



# Case Study:

## Building a Program to Grow Real Leaders

*How a Wisconsin community bank built the case for a low-budget, high-value leadership development program by staying true to who they are.*

*“You can not be a leader, and ask other people to follow you, unless you know how to follow, too.”*

*~ Sam Rayburn*



# Sharing our Story...

**Rachel Ojala Dumke**

*Talent Development  
Project Manager*



**Jenny DeCeuster**

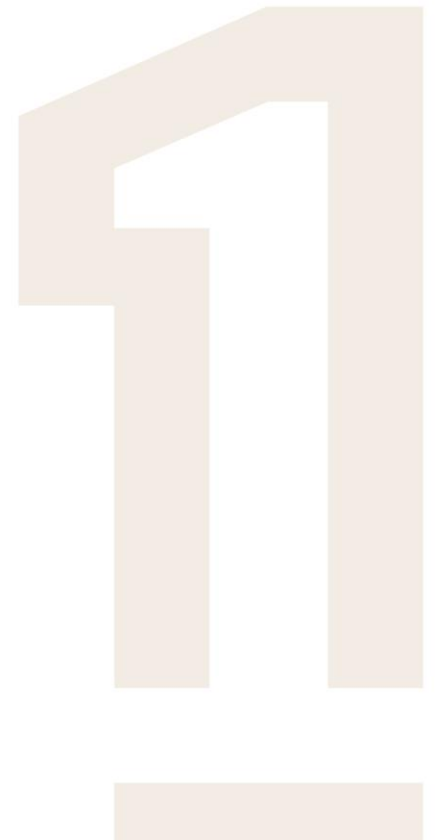
*Customer Service  
Manager*



**Ann Lueth**

*Human Resources & Talent  
Development, Director*







## Key Learnings...from the Dog

### If a dog were a teacher you would learn things like:

- Take naps
- Avoid biting when a simple growl will do
- Be loyal
- If you want what lies buried, dig until you find it



NEVER pretend to be something you're not





## Key Learning 1

# Be Authentic

### Best Practices:

- Define your program requirements.
- Know your “Why”
- Clearly define your leadership competencies
- Identify the leaders who best emulate those competencies and involve them.



“If you’re your authentic self, you have no competition.”

~Scott Stratten



## Poll Question

Are you currently using competencies in your **Leadership Development Program?**

1. Yes
2. Not Yet – We are looking into implementing competency based training (CBT) in the near future.
3. Unsure if competency based training is right for our existing program at this point
4. No. We do not plan to include them.
5. We do not have a leadership development program at this time.



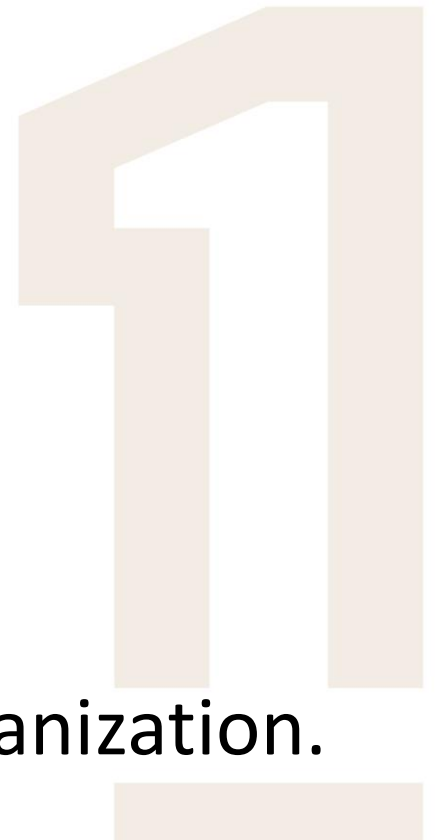


# Objectives

Take away at least one valuable insight that you can incorporate to:

1. strategically plan for
2. simplify the execution of
3. minimize the cost of
4. maximize the impact of

leadership development in your organization.





# Agenda – Dissecting the Case Study

## 1. Our Story

- Personal Intros and Getting to know you
- Who is FBFC
- How did “Leading With Distinction” come to life

## 2. How we accomplished it

## 3. Insights & Lessons Learned







# Part I: Our Story



“Today you are You, that is truer than true. There is no  
one alive who is Youer than You.”

~ *Dr. Seuss*



# The FBFC Story



- 155 Years Strong - Founded in 1859 as Summit Bank
- 1994 - 2<sup>nd</sup> location opened
- September 1997 – total of 5 locations
- March 2015 – 260 Employees , 12 branches, 2 loan offices
  - Continuous growth in support of client needs
- The FBFC Brand
  - One Bank | One Family
  - Organizational Culture
    - Authentic Leadership
    - Distinctive Customer Service
    - Employee Expertise – Learning and Development





# The Evolution

*...of Leadership  
Development at  
First Bank  
Financial Centre*





## Key Learning 2

# Be Influential

### Best Practices:

- Know your KPI's
- Make reliable data a priority
- Convert data into meaningful metrics and share insights.
- Provide access to knowledge necessary to accelerate the achievement of business goals.



“Leadership is not about titles, positions or flowcharts. It is about one life influencing another.”

~John C. Maxwell



# Part II: How We Accomplished It




*"A really great talent find's its happiness in execution."  
~ Johann Wolfgang von Goethe*



# Building the Case for FBFC's Leadership Development Program (Pilot)

## Develop the Business Plan/ Project Charter:

- Objectives and Vision
- Business Reasons
- Project Description
- Scope
- Business Needs - Including costs
- Assumptions
- Outcomes & Success Measures
- Project Team
- Timeline



**FIRST BANK**  
FINANCIAL CENTRE

**HRTD Project Charter**

...a preliminary outline and comprehensive project summary intended to serve as an ongoing reference to ensure the actions of the project team stay within the original scope defined—which was approved by critical partners.

Project Name: Leadership Development Program - Pilot

Date Initiated: September 27, 2013

Proposed Start Date: January 2013

**Project Vision and Objectives**

FBFC's learning culture and continued investment in employee development are contributing factors to our ability to attract and retain high-performing talent and be recognized as a Top Place to Work. As the organization continues to grow our human performance initiatives (HPI) need to stay ahead of that growth, as the need to have employees positioned to fill key roles within the organization is imperative. An effective **Leadership Development Program** can be a significant competitive threat, ensuring the organization not only can outperform the competition, but is also well-positioned to act on opportunities that fit our growth strategy.

The purpose of this initiative is to identify (6) preferably high-potential (as opposed to high-performing) leaders within FBFC to participate in a leadership development program pilot for the intended purpose of maximizing their organizational contributions to achieve the following objectives:

1. Increase the successful execution of business strategies to achieve organizational goals, through measurable improvements in desired leadership: knowledge, skills and attitudes (KSAs) as defined by organizational and position competencies.
2. Identify, personally recognize, and establish a baseline measure for the retention of *high-performing & high-potential employees*.
3. Increase bench strength and effective succession planning by building talent to create a pool of employees capable of filling key management roles.
4. Enhance employee engagement through a culture of continuous improvement fueled by leaders who coach, mentor and develop other leaders, creating distributed leadership at all levels

Effective leadership drives productivity, operating revenue, cost management and profitability. Investment in the resources necessary to measure a leadership development program's outputs and make a connection with these final outcomes is imperative.

**Business Reasons**

**Effective leaders are able to analyze: market forces, the organizational culture and the desired KSAs of a leader, and appropriately respond to them.**

**The Market:**

- **Sustain Organizational Performance** through times of economic uncertainty, ever-aware of how the financial services industry and regulatory agencies have responded to changes in economic conditions.
- **Outperform the Competition** - Competition will grow stronger now that most of the struggling banks have closed their doors or improved their standing.
- **Enhance Customer Satisfaction** - trends in & demands for: innovative products & services, competitive rates,

**Project Description**

76% of CEOs say it is important to grow their leaders but only 7% think their organizations are doing it successfully. (Source: 2011 study by consulting firm McKinsey & Co.)

Connect the human and financial sides of the organization by building an effective **Leadership Development Program** after analysis and integration of the following three components (as outlined in Business Reasons):

1. Where – Our Market
2. What – Our Organization
3. Who – The Individual

**Overview (see attached visual):**  
**Title: *Leading with Distinction***  
*Successful completion of this Leadership Development Program is based on the relentless focus and daily practice of the three dimensions of leadership.*  
**People – Operational – Organizational**

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# 6 Step Process

1. Rally Your Team

2. Obtain Stakeholder Approval

3. Plan It

4. Brand and Market It

5. Execute the Plan

6. Report the Results



# Step 1 – Rally the Team

## Factors for Participant Selection:

- Defined Requirements
- Organizational Growth
- Succession Plan
- Executive Approval

## Program Participant Support:

- Participant's Manager
- Accountability Group
- Accountability Group Coach
- Course Facilitators
- 3<sup>rd</sup> Party Coach
- Executive Management

## Communicate your:

- Purpose (your **WHY**)
- Leadership Strategy
- Program Goal & Description
- Tactics (Core Components to achieve desired outcome(s))
  - **What** do you need to do to achieve your goal
  - **How** are you going to do it
- Success Measures
  - Reaction
  - Learning
  - Job Impact
  - Business Results



## Key Learning 3

### Communicate More

#### Best Practices:

- Cc: Managers on participant communications.
- Provide managers with the resources they need to coach to key learnings.
- Ensure managers are providing their participating employee the opportunity to apply and develop newly acquired skills.



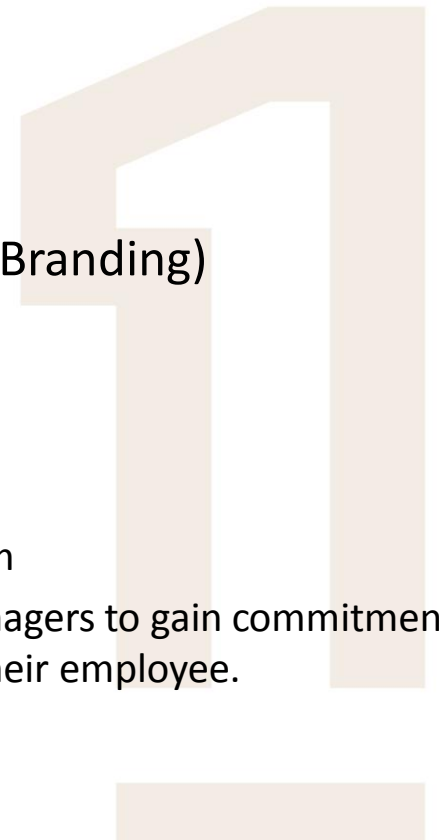
“The single biggest problem in communication is the illusion that it has taken place.”

~George Bernard Shaw



## Step 2 – Obtain Stakeholder Approval

- External Business Partners/Providers
  - Ensure Statements of Work are complete
  - Order program materials
- Internal Business Partners
  - Marketing (Obtain commitment to support Program Branding)
  - IT (SharePoint LWD - Meeting Centre)
  - Program Facilitators
  - Managers
    - Call managers (individually) to introduce them to the program
    - Conduct a planning meeting with proposed participant's managers to gain commitment to the initiative's objectives and approval to formally invite their employee.





# Step 3 – Plan It

- Finalize the program details:
  - timeline and model
  - resources (i.e. collaboration tool)
- Secure logistics
- Conduct Program Kick-off
- Obtain Participant Commitment
- Participant Pre-Survey

Leading With Distinction – 2014 Pilot Timeline & Model

12 Month Leadership Development Program Pilot (March 2013 – February 2014)												
	April	May	June	July	August	September	October	November	December	Jan.	Feb.	March
ILT and e-learning	Coaching Methodology Intro	Course 1 Coaching		Course 2	Course 3	Course 4	Course 5	Course 6	Course 7	Course 8		
Measuring Results	Individual Goal Setting Manager & Accountability Coach feedback & approval	Individual Devel. Plans (Manager & Accountability Coach feedback & approval)		Pre & Post Learning Assessment and Course Evaluation	Pre & Post Learning Assessment and Course Evaluation	Pre & Post Learning Assessment and Course Evaluation	Pre & Post Learning Assessment and Course Evaluation	Pre & Post Learning Assessment and Course Evaluation	Pre & Post Learning Assessment and Course Evaluation	Pre & Post Learning Assessment and Course Evaluation	Program Goal Review (w/ Mgr. & Accountability Coach)	Leadership Program - Survey Distribution 3 <sup>rd</sup> Party Coaching
Leadership Journal	Topic: Reading Reflection & Program Goal-setting	Topic: Reading Reflection & Goal Evaluation		Pre-reading for Mo. 2	Pre-reading for Mo. 4							
Reading												
Coaching	Coaching 120 day Program											
Team Project												
	Manager	Accountability										

Leading with Distinction

Welcome to First Bank Financial Centre's Leadership Development Program!

**Program Description**  
 The 12 month Leading With Distinction program aids and accelerates the achievement of participants' goals through the enhancement of leadership skills. Successful completion of this leadership development program is based on the relentless focus and daily practice of the three dimensions of leadership: people, operational, and organizational.

*"When leaders are transformed, the transformation of their organizations follows not far behind." – Antony Bell, author of "Great Leadership, What it is and What it Takes in a Complex World"*

**Program Contacts**

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**Sales Progress Contact**  
 timgsalesprogress.com

**Program Participants**  
 Jenny DeCeuster  
 Tawna Hannaford



## Key Learning 4

### Personal Investment Creates Engagement

*Financial investment yields  
personal commitment*

#### **Best Practices:**

- Have participants and their managers literally “buy-in” using employee development dollars (allocated to departments)



“No other investment yields as great a return as the investment in education. An educated workforce is the foundation of every community and the future of every economy.”

~ Brad Henry





## Step 4 – Brand It

### Partner with Marketing to create a program title and image that:

- Provides immediate recognition
- Sends the desired message
- Is a symbolic representation of the focus and purpose of the program
- Is reflective of the organization's brand

#### Tips:

- Define your Why
- Clarify your purpose and value proposition
- Stay focused on the participants and organizational culture.



## Step 5 – Execute the Plan

### Monthly

- Instructor-led training
- Team meeting (participant host)
- Monthly Key Learnings and Assignments (posted on Monthly SharePoint Site)
  - Progress Update
  - Group Discussion (i.e. work through a case study)
  - Reading (Book or articles)
  - Journal Questions
  - Self-assessments
  - Program Pulse Surveys
  - Project Preparation
- 3<sup>rd</sup> Party Vendor Coaching Assessments

### Frequency varied by Team/Participant

- Coaching meetings
  - Manager
  - Accountability Coach
  - Coaching Vendor Coaching Session
- Final Team Projects



## Key Learning 5

### Keep It Simple

#### Best Practices:

- Maintain a consistent and clear framework.
- Make learning easily accessible.
- Find speakers skilled at simplifying complex messages & tying it back
- Layer knowledge



“Great leaders are almost always great simplifiers, who can cut through argument, debate and doubt.”

~General Colin Powell



## Key Learning 6

### Make it Fun

*The best learning comes from play*

#### **Best Practices:**

- Ask
- Gamification
- Share what you know
- Fall down



“Play doesn’t just help us to explore what is essential. It is essential in and of itself.” ~Greg McKeown, *Author of Essentialism, The Disciplined Pursuit of Less*



## Step 6 – Report (Share) the Results

### Desired Measurement:

- Implement measures throughout the program to help you:
  - Prove
  - Improve, and
  - Reinforcethe impact and effectiveness of your leadership development program.
- Consider measuring:
  - Reaction
  - Learning
  - Job Impact
  - Business Results

### Best Practices:

- Scale the measurement process to the size of the initiative.
- Report to management throughout the pilot.
- Use free resources such as Survey Monkey



# Part III: Insights Gained and Lessons Learned



“The most important thing in communication is  
hearing what isn’t said.”


~ Peter Drucker





## Key Learnings

- 1. Be Authentic**
- 2. Be Influential**
- 3. Communicate More**
- 4. Personal Investment  
Creates Engagement**
- 5. Keep It Simple**
- 6. Make it Fun**



Where do we go  
from here?





## Key Learning 7

(Continue to)

### Support Your Leaders

#### Best Practices:

- Support of behavioral change from the leader's manager
- Maintain the vision with Post-program leadership goal(s)
- Program "graduates" serve as the "Accountability Coaches" for the next group of participants.
- Maintain visibility & involvement (i.e. experiential learning, Mentors, Councils, etc.)



"Everyone has a fire inside. Leadership's role is throwing gas on it."

~ Leadership Freak



# Thank You for Attending

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