

Developing Talent as a Turnaround Strategy for Growth

How one financial services company is—quite literally—
taking Everything DiSC® to the bank!



For the entire financial services industry, 2009 was an exceptionally tough year. Newly implemented market steps and strategies to increase shareholder value were just beginning to turn around what has been called the most serious crisis since the Great Depression.

AND BANKS AND MORTGAGE LENDERS, trust and investment companies alike were facing the aftermath: a significant loss in consumer confidence and low employee morale. While many struggled to survive by reducing staff and slashing investments in talent development, First United Bank & Trust of Oakland, Maryland took a bold step forward. It reallocated its limited resources to the best training available and focused on developing its people as a strategy for business growth—by leveraging the power of Wiley’s Everything DiSC® solutions.

Banking on Everything DiSC to deliver

“From a financial perspective, with salaries and benefits alone, we recognized that employees are our biggest investment,” Chairman of the Board and CEO Carissa Rodeheaver recalls. “Yet, we weren’t spending enough time and energy on their continuing development outside of the specialty skills required for their jobs. Especially as we were facing this post-crash environment, we had to develop leaders at every level, to help everyone develop the communication skills needed to be more effective. And we were fortunate to have Jeannette Fitzwater, an Authorized Partner

and Certified Trainer of Everything DiSC, ready to introduce us to DiSC®—tools that were already proven to be effective in building better working relationships between managers and employees, within teams, and with customers.”

Targeting teams and departments with the greatest potential for business growth, the company’s trust and investment officers were the first to experience Everything DiSC® Sales, a customizable DiSC-based tool designed specifically to help them effectively recognize and adapt to their customers’ unique buying styles and, ultimately, deliver better bottom-line results.

Within a year of the initial sales training event, First United found other areas where Everything DiSC could make a difference as well. The company incorporated Everything DiSC® Management into an existing coaching and mentoring program—one required for all supervisors—to enhance the critical skills needed to build solid, one-to-one relationships with direct reports as well as up the chain-of-command, and to increase the efficiency and effectiveness of strategic execution. Then, as the company turned its focus on leadership succession, Everything DiSC Work of Leaders® became a core

component of First United's leadership development initiative. The company now offers a full-fledged Emerging Leaders program which includes a certification component and engages high-potentials in identifying how their DiSC style shapes their approach to the fundamental work of leaders: creating a vision, building alignment, and championing its execution. The program also includes department rotations, reading assignments, online courses, strategic action learning projects, and mentorships between aspiring leaders and those soon-to-retire boomer leaders.

Leveraging the common language of DiSC to build better relationships, company-wide alignment, and sustainable growth

"That first Work of Leaders program was extremely successful," Fitzwater recalls. "It caught the attention of the executive team who saw such positive results that many became quite bullish on bringing other tools in the Everything DiSC family to all 330 of the company's employees. In fact, the most exciting development is that we are now reaching across the company using the Everything DiSC Workplace® tool. Adding this solution to what we already have in place—for sales people, supervisors and managers, and



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up-and-coming leaders—lets us truly integrate the entire organization. Every single person employed by First United, from the time of hire and throughout his or her career, is experiencing DiSC and benefitting from the common language this model creates."

As First United Bank & Trust enters its seventh year of doubling-down on its investment in its people, the organization has seen impressive results: employee turnover rates below industry averages; a loyalty product

that has won new small business customers with profitable long-term potential; strategic projects executed ahead of schedule—in one case saving \$60,000+ right from the start; an emerging leader who found a more effective way to work with her boss and is now in a key senior leadership role. According to Chuck Olsson, Chief Human Resources Officer, Everything DiSC is fundamentally changing the very culture of the organization. “These Everything DiSC tools, in particular, create a high-level of self-awareness that, quite frankly, no other tool can provide. And that core insight into one’s motivation and into the style and motivations of others is like fuel for employees to take the initiative to improve in their work, relationships, and jobs. While our culture was obviously already here, Everything DiSC really helped turn it on!”

Fitzwater agrees. “Like everyone else in business, we continue to have to find ways to do more with less, which requires that we change things and execute better. Fortunately, we’re already seeing plenty of great examples of better execution as a result of our work with Everything DiSC because it’s all happening in alignment. And our plan over the near-term, the next three years, is to keep this all going. We want to start what I call cross-functional conversations where we’re branching out beyond in-tact teams to bring together groups whose success is interdependent. This is the logical next step for us because to really release the power of Everything DiSC we know we can’t see this as a one-time training event. Its real value is as an ongoing tool to build more effective relationships and better, more productive workplaces.”

— *Written by Terri Armstrong Welch*