

Really Engaging Employees

In 2003, CUNA Mutual Group, the leading provider of financial services to credit unions and their members, initiated changes that included a new organizational structure, new ways to interact with internal and external customers, and a renewed focus on their strategy. But despite a barrage of communication including intranet articles, executive-led forums, and PowerPoint presentations about the new policies, behaviors didn't change.

A 2004 employee survey showed that more than half of the employees didn't understand their own business unit strategy. If employees didn't understand their own goals, how could they deploy corporate goals and strategy enough to make radical change happen?

The business need

CUNA Mutual contacted Root to help create tools to connect employees in the process of change. Its executives chose three focus areas, and Strategic *Learning Map*® modules were developed to bring these strategies to life.

The first concerned marketplace conditions and the current state – the “why” of change. The next step was to go deeper into the strategy. This module focused on the “what” of the change to help employees understand the strategic direction, the new organizational structure, how that impacted solution development and delivery, and how they measured results.

Module 3 took a different approach, using leaders as “teachers.” CUNA Mutual created consistent terminology, tools, and framework for managers to use with their teams. Each manager used a “kit” with detailed instructions on how to facilitate, dialogue questions, and companion tools. This provided a common framework of how corporate goals connect to the business unit goals, how business goals connect to departmental goals, and how those connect to individual performance objectives. The kit included a visual, a poster showing elements of the balanced scorecard, and a section on writing SMART objectives.

Implementation

All 5,000 employees experienced the Strategic *Learning Map*® sessions. Multiple sessions were set up over the course of a several weeks, and were kicked off by a member of the executive team. Employees registered through an intranet system. Each facilitator was responsible for attendance records.



“Employees in almost every group started talking about change!”

— Jennifer Kloeping,
Human Resources





Two months after the first module was deployed, 95 percent of all employees had experienced it. Because field representatives are out with customers, virtual *Strategic Learning Map*® sessions were also used. Later that year, when the international team took it to England, Ireland, and Puerto Rico, it received rave reviews in all countries!

Results

CUNA Mutual began to see results even before the sessions were finished. During the final exercise, when employees were asked to complete an activity card, “The light bulbs started coming on!” says Jennifer Kloeping, Performance Management Consultant, Organization Capability, Human Resources. “By the end of this module, employees came to their own conclusions about the marketplace conditions and how we had to change as a company to grow and be successful.”

In an electronic survey, an amazing 99 percent of employees chose a 4 or higher on a 7-point scale on all items. Eighty percent rated the session as effective overall, and the same number said they have a better understanding of how to make an impact, showing a successful alignment between department and business unit strategy. The CEO frequently uses the Roadmap visual with customers to describe the company’s transformation.

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About Root

Root is a strategy execution company that helps organizations engage people as a catalyst for change using a proven framework that consistently achieves clarity, ownership, and results.

