



HOW TO TURBO CHARGE EMPLOYEE SUCCESS



True Sky Federal Credit Union



Our Speaker



**Sean Cahill,
President/CEO
True Sky FCU**

About True Sky

- Oklahoma City, OK
- Approx. \$918M in assets
- Over 56,700 members
- 198 FTEs
- 16 branches



About True Sky Federal Credit Union

True Sky Federal Credit Union has been serving the Oklahoma City metro area since 1946. We're a not-for-profit and member-owned financial institution providing low rates, minimal fees, and customer service that you can't beat. What started as a desire to help FAA employees with their financial needs has grown into more than we could have ever imagined. We strive to serve, empower and enrich our members and communities. Here at True Sky Federal Credit Union, we are truly Oklahomans who are passionate about helping our local communities. Our mission is to serve our members to the best of our ability, empower communities to become educated in finances and enrich our members' lives by knowing who is handling their money and making their dreams come true.

The Challenge/Opportunity

- True Sky has a multiple common bond charter and serves members across 16 branches, including a new *state-of-the art technology branch* and the *largest fleet of ITMs* in the state.
- Our assets have increased 44% in the past four years and our branch network has nearly doubled.
- We are trying to transform our credit union into a technology company with purpose. We must *be more innovative and change with the times*.
- Change is never going to stop and is *happening faster and faster*.

Change. Grow. Transform.

- To accommodate changes in technology, member expectations, market, and more, we launched a transformation team called, *Change. Grow. Transform.*
- The team launched three years ago while converting from a core processor we'd been on for four decades.
- Employee focus groups helped us determine a *dedicated team* would best help True Sky manage change moving forward.
- In the beginning, the team *served as a source of positive reinforcement* during the core conversion, ensuring *effective communication* among team members, and distributing thank you notes and treats to boost morale.
- Today, Transformation team members act as a conduit, *soliciting feedback* from colleagues, as well as *sharing information to help employees better understand the "why"* behind changes occurring at True Sky.

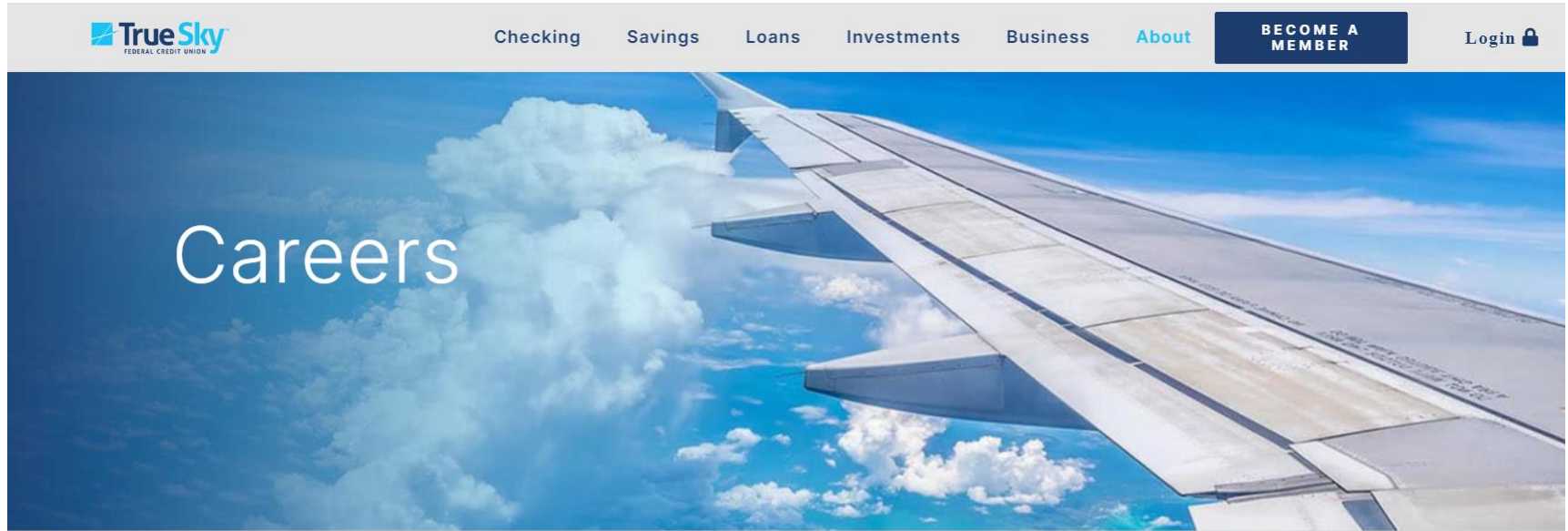
Well-Balanced Representation

- The team pulls together volunteers representing departments— including the *loan department, contact center, fraud, and operations support*, as well as a few different *branch locations*.
- Importantly, *senior leadership does not hold a seat* on the transformation team. Our HR director runs the meetings and determines agenda items, but otherwise we try to *avoid placing managers on the transformative team* altogether.
- The focus on *peer-to-peer communication* is an essential success factor. Not only is it more effective than top-down messaging when it comes to opening lines of communication, it also *encourages employees to speak their minds*.
- During a recent training session, team members asked around to find out *what others would like to enhance* inside the organization and what they envisioned the culture looking like in the future.
- Of course, it's also important to *act on employee feedback* when possible.

Transparency is Key

- We *acknowledge employee feedback* and thank them for their engagement. We're also transparent *when the credit union can't address a topic*.
- For example, at the behest of the transformation team, True Sky *now distributes a newsletter* to keep employees apprised of the goings on across the organization.
- And when we merged with Central Oklahoma FCU in 2022, the transformation team *served as ambassadors* with employees from the smaller cooperative, even adding a spot on the team for a Central Oklahoma employee.
- Overall, we are pleased with the concept and results of the transformation team.
- Employees are *aware of change* and *involved in an organization-wide conversation*.
- True Sky also has a *pulse on the attitude* of our workforce *and the pain points* employees face.

Crafting a Career Flight Plan



Come Work with Us

Considering a True Sky Federal Credit Union Career?

So you're thinking about a career at True Sky Federal Credit Union? Here's what you need to know! True Sky Federal Credit Union is a great place to work! We offer a fun, friendly environment where you can really make a difference. We're passionate about helping our members reach their financial goals, and we're always looking for talented, driven individuals to join our team.

[Our Beliefs](#)

[Current Openings](#)

[APPLY NOW](#)

Helping Employees Take Flight

- To help employees decide where they want to be, typically in three years or more, and how to get there, we encourage them to craft an *individual development plan* (IDP).
- Employees *own their own career flight plans* and participate in the program on a 100% volunteer basis.
- The largest hurdle employees typically face is simply *getting started*. Staff worry about setting the wrong goal or action step. But these are personalized plans with *no right or wrong answer*.
- Whether on a physical piece of paper or in a computer, naming goals and *crafting a roadmap helps* True Sky employees identify success and work toward achieving it.
- To help employees take those first steps — and continue to work their plan — we offer *templates and workshops* to help employees gauge current performance as well as conduct their own research on potential training, experience, or skills needed. We also offer *formal assistance* before all-employee training days.



CLO Development Plan

To be completed by _____ (Date)

Objective	Type	Start Date	Due Date	Details	Notes	Date Completed
Consumer Lending						
Performance and potential initiatives to determine success within Consumer Lending	Performance		09/30/2019	2019 Holiday Loan		9/30/2019
	Performance		11/30/2019	Implement OnSpot Program		1/14/2020
	Performance		02/28/2020	Borrow and Save Loan Program	Delayed due to the Stand True Loan	
	Performance		03/31/2020	Develop Credit Card Department	Hired Credit Card Manager	05/01/2020
	Performance		03/31/2020	Establish Preferred Dealer Program	Started this with two different dealerships	07/01/2020
	Performance		05/31/2020	Centralize all functions of Consumer Lending	Hired 4 of 7; on track to complete	06/18/2020
	Performance		05/31/2020	Establish QA Department	In establishing centralized lending this should be completed	06/18/2020
	Performance		06/30/2020	Reprice Credit Card Portfolio and Program	Started and will be complete by 6/30 This has been delayed due to the rate <u>environment</u> , however it is still on schedule to revisit in 2021.	
	Performance		09/30/2020	Evaluate Leasing Program	Determine if this would be beneficial for TSCU	

Providing Guidance Along the Way

- Employees are encouraged to *talk with their supervisors* if they are interested in an IDP and our chief administrative officer makes herself *available to mentor employees, offering guidance, inquiring about where they are in their plan, and discussing potential barriers.*
- Leaders also *set examples through their own participation.* Our chief lending officer, vice president of real estate lending, chief information officer, and chief administrative officer all are or were on IDPs. Other leaders are working on plans, too.
- Employees who can show *they've worked a development plan* and took tangible steps toward achieving a goal *have a leg up* when it's time to determine promotions or fill vacancies.
- We focus on *developing our talent from within.* We've promoted employees who have gone through development plans. That's impactful because *employees see this works.*

Transformation Team



Q&A Discussion Period



THANK YOU FOR WATCHING



1001 Connecticut Ave NW
Ste. 1001
Washington, DC 20036



callahan@callahan.com
www.callahan.com



800-446-7453