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Client Story

Evolving a Leadership Culture, One Conversation at a Time

Columbia Bank has been delivering leadership development successfully over the past few years. It’s interesting to take a look at what drove the initiation of their development curriculum. “We knew there was a major shift taking place in our customer demographics that would require our employees to be more digitally enabled,” explains Shana Erickson, senior vice president of leadership development and effectiveness. “The digital transformation happening in the banking industry meant changes for our processes and our people. It was important for us to not only preserve our unique culture of creating strong relationships with customers but also evolve that culture to keep working for us in the future.”

The added challenge of managing numerous acquisitions in ten years helped Erickson realize the importance of partnering with senior leaders to codify their leadership culture and integrate it at several levels in the organization. “Servant leadership was the model we wanted to follow, so we needed to do the transformational work to define what servant leadership looked like for our company,” says Erickson.



Shana Erickson

In the Blanchard® servant leadership model, leaders first set the vision for the company, then flip the traditional pyramid to empower those closest to the customer to deliver on that vision. Servant leaders believe their purpose is to serve, not be served, and to help their employees be successful through goal achievement. Building that environment depends on leaders having the skills to develop trusting relationships and encourage honest, open communication. “Making adjustments to organizational culture can be difficult to manage, but I knew that leveraging an agile methodology and developing a coaching mindset would set us up for success,” says Erickson. “The concept of servant leadership is easy to understand, but implementing the necessary changes can be a challenge. As part of the agile approach, we took leaders through an iterative process in five week sprints and made changes and course corrections along the way. Part of this journey included executive coaching for our leaders. It was important for them to have the experience of working with a coach to get the personal support they needed to enhance their capabilities and skills.”

Executive coaching provides senior leaders with a confidential and neutral sounding board so that challenges and opportunities may be discussed in a safe environment. Columbia Bank brought Blanchard coaches in to work one on one in a highly customized approach that gives each leader exactly what they need to operate at a peak level. The action-oriented sessions focus on helping the leader achieve successful business outcomes. “Working with executive coaches, we started building an army of influencers that would help us evolve our leadership culture one conversation at a time,” says Erickson.

Columbia Bank also worked with Blanchard to create an internal executive coaching process so that both Erickson and her colleague, director of talent development Michelle Drager, can offer coaching to other senior and executive leaders. This coaching not only supports learning for leaders going through Blanchard programs but also assists them with leadership competencies and succession growth.



Rolling Out the Leadership Culture

Columbia Bank held several culture events for employees. Each event featured a keynote describing the servant leadership mindset along with a copy of the book *Leading at a Higher Level*, coauthored by Ken Blanchard and several subject matter experts from Blanchard®. The lively events engaged people with the servant leadership strategy at an individual level. Once the mindset was in place, leadership development was implemented at all levels to teach the skills necessary to support the servant leadership initiative throughout the organization. They worked with Blanchard to develop the curriculum, which includes Blanchard Management Essentials® for people new to a leadership role as well as SLII® so that all leaders could learn how to diagnose a team member's development level and offer the right amount of direction or support needed on any task or goal.

Once leaders complete these courses, they are eligible to attend Coaching Essentials® to learn how to have coaching conversations with their people that create connection, build trust, and improve performance.

“We don’t require people to go through the training, but we highly recommend it and let people self-select into the classes. We find that people seem to be more serious about learning when they make the decision to attend a class rather than being told they must do it. This system works for us,” says Erickson. “Recently we also began offering Leading People Through Change®, which teaches people a trusted method for leading a change initiative by involving others throughout the process. It fits perfectly within the servant leadership mindset and culture.

Advice to Others

Erickson offers encouragement for others who are considering this kind of plan. “Doing this kind of work that impacts the whole organization takes a lot of one-on-one time. You can’t underestimate how important it is to pay attention to the needs of individuals and be there to support them—over and over, if necessary,” says Erickson. As Michelle and Shana were preparing for a presentation to share the work of Columbia Bank, they developed a framework to describe the method. “Reading Vicki Halsey’s book *Brilliance by Design*, I knew having an acronym would help communicate the message, so I came up with AGILEHR. It’s a combination of being agile and working with your HR partners.”

The Framework

- Always put people first, treat them with respect, and honor everyone
- Give generously in terms of meeting people where they are, with no judgment, and bring them along
- Inside out development. Start with coaching first to get at the core of who people are
- Leader led. Get buy-in from executives by having them experience the coaching and the training
- Empower people by training them to use the skills of SLII®
- Harness potential by getting leaders at all levels involved
- Reinvent continuously to adapt to changing times

Erickson credits two key elements to the success of her team’s work. “I can’t stress enough the importance of executive coaching. I believe every executive should have a coach, and I’m not sure this would have been possible without our leaders experiencing the coaching with the team from Blanchard. Also, find a vendor who is willing to be your partner, not just a supplier. Blanchard approached our needs holistically by working to understand our wishes and desired outcomes. They even helped us integrate content from other places into the overall plan. They knew what we wanted to achieve and became part of the solution. Blanchard is our partner in leadership development and a strong part of our evolving leadership culture.”

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