

Sandy Spring Bank sought to boost engagement companywide and knew that managers would need to play a starring role.



Who is responsible for reinforcing company culture? What role does a manager play? According to employees, the role a manager plays may be the most important one. When Sandy Spring Bank found itself struggling to deliver on its brand promise, it looked to leverage the impact of coaching on employee engagement and performance.

Our story

The year was 1868 and the United States was rebuilding in the aftermath of the Civil War. The town of Sandy Spring, Maryland, was a small, Quaker community located about 25 miles from Washington, D.C. A group of local businessmen and townspeople wanted to establish their own community-based financial institution independent of the influences of the District of Columbia and Baltimore. The bank would serve the interests of all people in their community, and be staffed and managed by those who lived and worked there.

Today, Sandy Spring Bank is the oldest, largest, independent community bank headquartered in Maryland. We have a 46-branch network and employ more than 700 employees. Our dedication to serving the needs of our community has remained virtually unchanged for nearly 150 years.

During the past 20 years, Sandy Spring has experienced record growth through acquisitions and branch expansion. We sit in one of the most affluent and heavily "banked" areas of the United

States. While we were growing, our community bank competitors were being gobbled up left and right by the large banks.

Bank mergers make economic sense when the banks combine operations and reduce staff. As a result, there was no shortage of talent for Sandy Spring Bank to recruit and fuel the growth.

These new hires brought with them not only their considerable work experience, but also their own banking cultures. The result was a melting pot of banking cultures trying to co-exist within an organization that prided itself in its unified approach to providing remarkable client service.

As stressed as our internal culture was, the external environment added a multitude of serious challenges. Banks felt the impact of the recession particularly hard. Record low interest rates put pressure on profit margins and stock prices. Business owners found themselves unable to meet credit obligations and banks had to write off billions in bad debts. Bank service charges came under fire from consumer groups and Congress. Finally, the mortgage crisis and "too big to fail" caused consumer confidence in banks, all banks, to hit an all-time low.

The solution

To emerge from the crisis stronger than when we entered it, we needed to re-engage and reinvigorate our employees around delivering a consistently remarkable client experience. A critical component of this process would be for the bank to provide a remarkable employee experience. Employees will only treat their clients as well as they are treated.

Logic dictates that if you want to know what kind of experience your employees are having, ask them—so we conducted a "Voice of the Employee" survey. The results reaffirmed the important role of the immediate supervisor in employee engagement. Our employees told us loud and clear that they wanted more regular performance feedback and more career development opportunities. A strong manager in the role of coach can provide both of these.

Although our retail branches had a highly structured monthly coaching process in place for sales and service results, there was no consistent coaching happening elsewhere in the bank.

We would have to "sell" the need for a coaching program by making it relevant to business results and obtaining an executive sponsor.

We developed the concept of a certification program and selected metrics tied to our client experience strategy. We secured our executive sponsor and were given the go-ahead for a pilot as long as we limited our expenses largely to in-house resources. Development of the FOCUS Coach Certification program took more than eight months.

Program design

We started our program design by defining our learning objectives. We knew that, over time, we wanted to improve employee engagement as measured by future surveys. But it would take time to move that needle in any significant way. This was a pilot program, and we needed to prove it worked. Because we were operating under the fundamental belief that an employee's manager has the greatest influence on his engagement and performance, we realized we needed to change the individual behaviors of every manager who went through the program.

Although coaching was our primary focus, we recognized that too many of our supervisors lacked basic management skills and knowledge of employment law. We needed to address those basic needs, and we wanted a deep dive on coaching skills. We landed on an "all for some, some for all" strategy. We would require all managers to take certain basic courses and target our more rigorous coaching certification toward midlevel managers who could influence the most employees and be role models. We decided to hand-select the inaugural class of participants and communicate it as an honor to be chosen. We kept the class size small at 11 participants, with representation from across the company. This would enable participants to form relationships across departmental boundaries and help us overcome some of the silos in our operations. These silos often get in the way of delivering the remarkable client experience we sought.

To engage the managers from the outset, we invited the selected group of participants and their managers to a program

orientation where we reviewed the certification requirements and time commitments. Keep in mind that these are working managers who have their own deliverables in addition to managing a team. At least some of the required work likely would be done outside of working hours. We included a "learning contract" that all of them signed as a symbol of their commitment to complete all the certification requirements.

Learn, apply, reinforce

We adopted a simple learning model that integrated the manager's role in learning transfer. Our model was basic: learn, apply, reinforce. We offered a learning event; in this case, an instructor-led class. We assigned post-class application exercises (homework), and journaling was used extensively as reflection exercises both in the classroom and as homework. Finally, after each training session, participants scheduled a debriefing session with their managers, who had been provided with a debriefing discussion guide to help them facilitate the conversation and reinforce the learning.

Bringing the group together for training on a regular basis provided opportunities to share experiences and build relationships. It was amazing to watch the group dynamics change over the duration of the program. What started out as a disparate group of managers—many of whom had never met—ended as a cohesive group of colleagues who now call one another for counsel. In a post-program survey, this aspect of the program was noted repeatedly as one of the most beneficial. In all, there were five classroom training sessions. In the first introductory session, the team validated their Myers-Briggs type and explored type differences through a multitude of experiential exercises. Participants learned how type differences influence how we manage ourselves and others. It also provided a quick and fun way for learners to get to know one another.

The second session, called LEAD the Way, introduced a model for coaching conversations. After this session, participants transferred the learning by conducting and documenting monthly coaching sessions with each employee. Additional training topics introduced observation coaching and feedback, career coaching,

and managing diversity.

In addition to the application exercises that followed each training class, the participants selected and completed an elective assignment. We provided an elective guide with topics that included building effective teams, change leadership, delegation, listening, and recognition, just to name a few. The guide provided an assignment for each topic that incorporated the "learn, apply, reinforce" model. Participants learned by researching the elective topic.

The application assignment forced them to apply what was learned in the research to their coaching practices with their teams. Participants wrote a summary of the research and the application exercise to document how the research was applied and what was learned in the process. The written submission was shared with the manager, who debriefed with them to reinforce the learning.

The final aspect of the certification was a case study project. The participants were divided into smaller groups of three to four, and asked to analyze a prepared case study and to make recommendations for a 90-day management action plan. The case study presented a somewhat complex, but entirely realistic, scenario involving a manager who had been promoted to lead a new team. In addition to the case study details, we provided additional materials, such as team member profiles and meeting transcripts, to help the groups dissect the issues.

Groups presented their findings and recommendations to a panel of senior leaders, including the program's executive sponsor and their managers. This project was a culmination of all the coursework and their experiences doing monthly coaching. At the end of the presentation, group members shared a personal reflection about how the program had affected each of them personally. It was a powerful way to end the program by hearing how the participants had been transformed.

Results

Although it is too early to show a significant impact of one limited pilot program across the organization, we are pleased with the results we have seen so far. At the conclusion of the program,

we surveyed the participants' managers. More than 90 percent "agreed or strongly agreed" that the participants were more effective coaches.

More importantly, the program had a profound effect on the individual participants. All of the participants reported experiencing a transformation as a coach, manager, and leader in the company.

This effect is reminiscent of a common parable. In the story, a man is walking along a beach littered with starfish washed up on the shore. He begins picking them up one by one and throwing them back into the ocean. An observer asks the man why he is bothering because there are thousands of starfish and he can't possibly make a difference. As the man flings yet another starfish into the ocean, he replies that he made a difference to that one.

As learning professionals, we are constantly challenged to show the business impact of our learning initiatives. But we must not forget the impact we have on one learner in one moment. If we can re-create that moment hundreds or thousands of times, we will have a movement on our hands that can make a true difference on a grand scale.