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—Joseph Clouse

## THE JOB TO BE DONE

Mission Federal Credit Union (MFCU), founded in 1961 as a member owned business, is a financial institution that is dedicated to the Educational Community but serves all of San Diego County. It consists of 450 employees who serve 130,000 members in the San Diego Community.

In 1995, when Ron Martin became the new CEO, he spent the following year observing the organization and conducting member and employee surveys to find challenges and opportunities for growth. He discovered that the company was in good standing in the community and showed good financial performance, but had a culture which lacked trust and leadership. Departments operated independently, employees did not trust managers, empowerment was low and professional development was non-existent.

## SOLUTION

To unleash employee potential and increase effectiveness throughout the organization, Martin started a change initiative in 1996. Joseph Clouse, currently Vice President of The Learning Center, implemented The 7 Habits of Highly Effective People training, initially to management, followed by the senior team and finally to all staff members. Attendees started to implement principles from the training and use 7 Habits vocabulary in everyday communication. During the years that followed, MFCU also implemented The 4 Roles of Leadership, starting with the senior team, then training all management staff. They also started a project to define the Mission Federal Credit Union Mission Statement, Core Purpose and Core Values. “It wasn’t just management or senior leadership who defined the organization’s purpose and values,” said Clouse. “It was every employee and the Board of Directors, all working together. Everyone was involved, and the mission, purpose and values that we established then are the same that are in place today.”

Additionally, MFCU administered their first annual xQ (Execution Quotient) Survey, which measures an organization’s ability to focus and execute top company priorities, to all employees in October of 2002. They also worked with FranklinCovey to create a Leadership Assessment Program, and followed with specific leadership development activities to cultivate their managers into effective 21st century leaders.

## RESULTS

“When I first got here people were very apprehensive about sharing their ideas with others, and not very enthusiastic about the company as a whole,” Clouse said. “After implementing the training, managers and employees are more supportive of the company as a whole, the things we do and the direction in which we are moving. Communication has increased and the culture has shifted from one of independence to interdependence.”

Mission Federal Credit Union’s training curriculum has evolved from a single teller training course in 1995 to their current offering of 50 stand-up courses, 65 online modules, self guided studies, and succession planning at various levels throughout the organization. To keep a continual focus on applying the training, Mission Federal Credit Union recognizes a “7 Habits” and a “Leadership” award winner at their annual business meeting. Each of these awards recognizes an individual who has applied the principles and values from the training into their job responsibilities. Their overall xQ score, which measures organization-wide execution capabilities on a scale of 1 to 100, has moved from 63 to 69 since 2002, trust ratings have increased from 50% to 70% and organizational alignment has improved significantly. They have also integrated the xQ Survey into their strategic plan as one of six measures they use to track progress toward key goals.

Clouse said, “Over time, we have done some great things. We still struggle in some areas, but we are constantly improving and as we continue on this path, with the help of FranklinCovey, I believe we will become a phenomenal and dynamic organization.”