

HR + People Platforms: A Formula for Talent Engagement and Empowerment

I am the engagement and culture director at GreenState Credit Union. I've been with GreenState now just over seven years, I've done everything I feel like, between my bank positions and credit union, and what keeps me in the business and the industry is, I feel like financial services is one, one of the few industries where we have an incredible amount of influence when we're working with our members or customers, because we're dealing with their money, how they're going to save it, how they might invest it, right, how they might borrow responsibly.

And I just feel like, you know, we've got to own that and use that influence very responsibly, because it is their money, right? And though I'm now working more in a support role, I'm supporting those who are working with our membership. And I love it. It's in my blood.

We don't have value police that run around the organization, calling people out, right? It's really up to each one of us, so we have to understand the value and be able to hold each other accountable. And so, of course, like probably most, where do you start with? You start with your new employee onboarding. Right? You want your new hires to understand what are your values? Right?

Your vision statement, your mission. You know, whatever that is, you're going to lay that out for them. And we do that. We have some discussion with them. We have some videos from some of our department leaders who speak to each value and what it means to them. So we try to give them examples to lay that foundation. And you know, I really think you have to find creative ways to continue to drip values and your culture on your employees after you hire them, right? It's not a once and done type thing.

Obviously, we go through the normal culture piece, the vision, the mission, the values, and I talked about that a little bit, but we have a segment that we do, it's called financial one on one. And I don't care if you've worked in this industry your life, or you're brand new to it, everybody participates, and we just take the time to break it down.

What does it mean to work at a financial institution? Where do we generate our revenue from? Right? What does that look like? And what are some of our major expenses? What are our assets? Which is a big trigger? Most think assets are deposits, right? They're not. They're our loans, because that's what generates our income. So helping them understand that is so important, because I don't care where they sit on the organizational chart, if they don't understand the foundation of what our business is and how they can contribute, you know, I think you're sunk before you get started, right?

So in my opinion, you have to get this basic with all of your new hires to help them understand your business and how they can contribute. And that's how you create a highly engaged employee.

We are encouraging people, and as I talk about, we're an extremely efficient organization, and we're always driving ideas from our employees about how to get better, and how do you get better? You've got to try things, and so you're going to make mistakes, right? And we're okay with that.

We want you to learn from the mistake. Probably don't want to repeat that same mistake, but we encourage people...because if you're restricted, that hinders us, right? And we want, we kind of want that blank page so that we can write our story and so taking risks, now, mind you, I don't mean compliance and risk, right, and violating any of those types of things, but we are not going to let anything hinder us from being able to try new and different things in order to take care of our membership, to grow our communities and to take care of our employees.

We try to be extremely transparent on all levels at GreenState, and a big part of how we do that is a really good visual on this chart is about how we really establish our goals and we set them.

So at GreenState, we have four organizational goals, and everybody in the organization ties up to one or multiple or all of those goals, depending on their job. And so, you know, we really believe that an employee has to understand what they do and how it contributes to their team, and then how it contributes to GreenState as a whole. And so in the goal setting process, we know those goals, and then each department leader works with their team on how their department drives that to the overall goals, and then the employees set their goals, and it's, you know, we're not telling them they're getting to set them. So it's in collaboration, once they set their goals that will, that will tie back to their department and ultimately, to the organization they use Lattice to go in and set the goals in there so that we can visualize everybody's goals.

It's, it's really pretty cool when you go in and see how you can filter through Lattice and look at, not only you know my goals, but I can see my boss' goals. I know the organizational goals, right? And my team, well, the first one would be one of our values, is all about growing. So we grow through learning, and after each value, we've got kind of a little tagline, so let me just share with you. It says we grow through learning. We expect growth, and we help our employees unlock their potential while learning from the occasional mistake. We're never satisfied with the status quo, so again, we're confirming for employees it's okay to make mistakes, right? That's how you're going to grow. You learn from them. So, but GreenState has been growing at 20% for the past 21 years on the average. So when you work for an organization that's growing at that rate, you darn well better be growing yourself, or you're going to get outperformed. That's just the bottom line.

So we expect our employees to own their growth and development, right? So they need to know what are they looking how are they looking to grow, and then it's our job to help them.

I think it's important to maybe say right up front, because we have three key constituents, we have our employees, our members on our communities, and you would naturally gravitate that the employees are the most important. We actually flip that. We say our employees. Did I say employees—I meant members—members would be the more I think I yeah, I tripped over my own words.

Anyway, you would think that you would say it would be the members right? But we actually put our employees in that top spot. And we do that because we feel if, if our employees feel valued, cared for, grown and respected and developed, right, they're going to take care of each other very well, and they're going to turn around and do the same with our membership. And I'm going to lay you odds, more than likely, they're going to give back in our communities with their time and their talent. And we see that. We see that happening. So with that, measuring our employee engagement and really listening to our employees is paramount.

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