

Case Study

Highlights of Innovations Financial Credit Union's Partnership with Integrity Solutions

As described by Dan Chaplik, Director of Operations



CREDIT UNION PROFILE

Asset size

\$620M

Members

24,000+

Membership

Individuals who live, work, attend school, or worship in the Florida Counties of Bay, Holmes, Washington, Jackson, Calhoun, Gulf, Walton, Okaloosa, Franklin, or Liberty.



OUR NOTABLE WINS

A **67% increase** in product sales income.

96% of employees reported feeling prepared for change by the organization.

94% of employees reported feeling optimistic about their future and the company's future.

A **34% increase** in employees feeling secure at the credit union. 89% now report they feel secure.

A **30% increase** in employees feeling appreciated, with **84%** now feeling appreciated.



CLIENT OVERVIEW

Innovations Financial Credit Union is dedicated to empowering our community and members with exceptional financial solutions. With roots tracing back to the 1950s, we've built a legacy of exceeding our members' expectations through every stage of their lives. Our commitment to innovation and member-focused service drives us to embrace new opportunities and continually enhance the member experience.

Over the years, we've been honored with several prestigious accolades, including the Expansion Award in recognition of our recent acquisition of First National Bank Northwest Florida in 2024. We have also been named a Best Credit Union to Work For in 2019, 2023, and 2024, and maintained our status as a Top Workplace Campaign for United Way of Northwest Florida. We take pride in fostering lifelong relationships and making a meaningful impact in the communities we serve.



EXPERIENCE WITH THE PROGRAM

After a recommendation from our Allied Representative, I attended the Train-the-Trainer as an Executive Champion. Our partnership with Integrity began after that workshop in 2021 when we invited our Integrity Solutions facilitator to lead the entire leadership team through the course as a pilot program. The results met expectations and more. This success led us to utilize additional services that continue to this day.

Our experience with Allied and Integrity has been transformative. Allied has been a trusted partner for many years. The best part of working with these teams has been the enriching experience of deepening our partnership with new tools for growth. We've developed new friendships and enjoyed watching our team thrive. The collaborative approach has not only enhanced our team's skills and performance but also fostered a stronger, more cohesive organizational culture. Additionally, our team genuinely enjoys the training sessions, finding them both engaging and enriching.



DESIRED OUTCOMES

There were several disconnects we were attempting to remedy, which pointed us to the Allied/Integrity partnership:

Our primary goal was to increase the focus, consistency, and effectiveness in our approach to coaching and developing our team members' skills. We aimed to ensure that leadership across the organization was aligned to consistently coach and mentor their teams using a more unified and repeatable approach. We desired to build a culture of team member development and growth.

Next, we wanted to align our sales culture, internal communication, and leadership efforts to enhance overall effectiveness and drive better results.

We needed to establish a simple and effective method for gathering actionable feedback from the entire team.

Finally, we needed a more formal method to develop our leadership and build an even stronger, more cohesive team. We needed to tear down silos and encourage cross-departmental collaboration.



SOLUTIONS

We are currently utilizing *The Member Advantage (TMA)* service-selling CU program and have incorporated it into our onboarding program for all new hires. We took the entire Credit Union team through the TMA program, both front and back office to ensure a consistent language and approach to member service. Our team feels that the TMA training builds confidence by empowering every individual to grow both their skills and abilities, while confirming the value they contribute to the success of Innovations. We've observed a significant improvement in communication and collaboration throughout the organization. Areas that once operated in silos are now integrating into the larger team, fostering a strong sense of "team spirit" and synergy.

We also utilize *Integrity Coaching* and have incorporated Allied's *5 Behaviors of Cohesive Team* training and implemented their Employee Surveys 3 years in a row. .



IMPLEMENTATION

One of the primary obstacles we faced was the common resistance to change. However, Allied and Integrity helped us navigate this by offering a seamless and comprehensive experience for participants. This support was instrumental in helping us overcome resistance and to successfully implement the new system.



IMPACT

Since implementing this solution, the most significant win has been the remarkable improvement in our organizational culture. Employees are now more engaged, motivated, and aligned with our core values, leading to increased collaboration, innovation, and productivity. This cultural shift has not only enhanced service quality but also driven a rise in member satisfaction and loyalty, strengthening our competitive position in the market. While some results were immediate, others took time, as changing culture and behaviors requires hard work, consistency, and buy-in from the entire team.

Our members have expressed great satisfaction, noting improved service quality, more personalized interactions, and greater trust in our services. They appreciate the increased efficiency and responsiveness, which has deepened their loyalty. Even initially hesitant team members have come to value the efforts, resulting in enhanced communication and collaboration. Our feedback platform and improved sales ratios speak volumes, highlighting our successes.



ADVICE TO OTHER CREDIT UNIONS

For anyone considering a partnership with Allied and Integrity, it's crucial to understand that they don't pretend to provide quick fixes for longstanding issues. Instead, they guide leadership through the hard work necessary for organizational change. The responsibility lies with the leadership team to implement these changes. We view Integrity as a valuable tool in our toolkit—acting as consultants, guides, and coaches. Their services should be part of a comprehensive and focused approach for maximum impact, rather than used in isolation. However, the rewards are substantial and well worth the investment.