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Client Story

Building Strong Relationships at Columbia Bank

Headquartered in Tacoma, Washington, Columbia Bank has more than 150 branches throughout Washington, Oregon and Idaho. They know their extraordinary employees truly make a difference in the overall success of the bank, but realize there is always room for improvement. "We wanted to unlock potential and create even better and stronger relationships between leaders and their direct reports," explains Michelle Drager, director of training and development. "Some leaders were doing this better than others. We needed a leadership development program that could be used consistently across the organization."

Michelle Drager

The solution was SLII® from Blanchard®. Shana Erickson, VP and director of leadership development, was familiar with SLII® and trusted it would be a good fit for the culture. "I knew SLII® would provide the foundation our leaders needed to be able to identify the needs of their people and help with those needs. SLII® is a beautiful way to improve leadership because it gives people the language, skills, and framework they need to be successful," Erickson says.

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THE ROLLOUT

Columbia Bank delivered the first SLII® session to a group of core senior managers and high potential future leaders. “We worked closely with this group to gather feedback to make sure the program would be effective for our specific needs,” says Drager. The intention was to be slow and deliberate about rolling out the program and to use feedback to create a learning experience that would help people transfer their learning back to the workplace. Ideally, this approach would create a positive buzz that would build excitement for others to sign up for the course. “Our plan has certainly worked—we have so much demand for the training that we’ve doubled the number of offerings this year,” Drager says.

Erickson and Drager are also intentional about making the most of their investment in SLII®. Participants know exactly what to expect, from prework activities they need to complete before they come to the training session to tools that are available to them after training. These tools, offered through an online platform called Blanchard Exchange, include worksheets to help with goal setting, conversation starters for planning one-on-one meetings with staff members, and checklists for assessing the effectiveness of their communications. Managers will find articles and videos to share with their teams to further their understanding of SLII® as well as an app that allows them to diagnose direct reports’ development levels on specific tasks or goals.

“Blanchard Exchange is easy to use and flexible. We use it to send email boosters reminding people throughout the company of all the resources that are available to them,” says Drager. “It is a great way to continue to direct everyone back to the tools that will help them make SLII® a common language and common practice.”

The company also takes advantage of the coaching sessions that are part of the SLII® certification process. “We have leveraged the coaching time to get help with best practices for facilitation, implementation, and getting internal sponsorship. Blanchard coaches are an amazing resource that is only a phone call away,” Erickson says.

NEXT STEPS

Shortly after rolling out SLII®, Erickson and Drager were introduced to the First-time Manager program from Blanchard®, which they piloted with the same group of high potentials that participated in the pilot of SLII®. This group of experienced managers agreed the First-time Manager content was applicable to any level of leadership. Once again, their feedback helped refine the program to meet the specific needs of Columbia Bank. “For example, although the people in our pilot group had been taking training for many years, they were impressed with the First-time Manager program content and felt it could be used immediately on the job by people in all levels of management. There was one hitch, however—we knew we would have more success with this program if we re-branded it from First-time Manager to Management Essentials,” Erickson explains.

Columbia Bank markets their Management Essentials course to all levels of management in the bank. For new or future leaders, the training is offered as a way to learn tools to help them effectively manage people—and for those who have been in a leadership role longer, the program points out the importance of refining skills they already have. “We often promote high performing individuals into leadership roles knowing they don’t have strong leadership skills. By offering Management Essentials to everyone, we are building that strong foundation in leadership and communication skills that serves people well regardless of their role in the company,” says Drager. “Our senior leaders like the program because it is simple, clear, and easy to apply. Sometimes training for senior leaders is very lofty and complex, but our senior leaders connected with this program immediately,” adds Erickson.

The latest addition to Columbia Bank’s curriculum is Coaching Essentials, a training program designed to help managers integrate coaching behaviors into their leadership style. The content connects directly with SLII® and Management Essentials but goes even deeper into developing the coaching skills managers need to help develop their direct reports.

SURPRISES ALONG THE WAY

Erickson and Drager were surprised to see how easily the employees embraced the training. "I was worried the senior leaders who were already successful bankers and experts in their field might not engage with the training," Erickson says. "I thought they might not be interested in developing leadership skills at this point in their careers. But I have seen some big shifts in this group of leaders. Their willingness to participate and hunger for growth has been inspiring." Drager agrees and says she has witnessed the same level of enthusiasm, adding, "Several of our leaders are responsible for leading people while managing very large portfolios. I suspected they might not welcome time away from their hectic schedules to attend training. I knew we would have to help them understand that these skills are valuable and that this would be time well spent."

The trick, according to Erickson and Drager, was to roll out the training in a measured way in order to create excitement around it. As people shared successes about the learning, excitement grew to the point that there is a waiting list for each class.

THE BALANCE OF SLOW AND BOLD

Although Columbia Bank recommends an intentionally slow implementation plan for other organizations considering this type of training, they encourage boldness as well. The slower implementation allowed them to incorporate feedback from participants into their program so that it works better in their culture. But their advice to other companies is to be bold enough to get something out there for people to react to. "Don't wait to get the perfect plan built before you start training," suggests Erickson. "We had key sponsorship from senior leaders and commitment to deliver the training, so we just started and continued to keep things very fluid so that we could make necessary changes along the way."

At Columbia Bank, the culture is based on community and relationships. Erickson and Drager believe these three programs—SLII®, First-time Manager (which they renamed Management Essentials), and Coaching Essentials—are a perfect fit. The training provides their people with improved communication skills that not only create strong relationships internally but also translate directly to improved relationships with the customers they serve.

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