

# Top Credit Union Uses Promotability Index Guidebook to Support Career Advancement, Communicate Expectations and Increase Employee Engagement



**Industry:** Banking    **Product Used:** Promotability Index® assessment



## Results

**Company:** SAFE Credit Union is a top 100 US-based credit union serving over 200K members, founded in 1940. Having previously earned multiple Best Places to Work designations, SAFE wanted to maintain their commitment to a culture of engaged employees.

**Challenge:** Part of its existing performance management system included a 12-month review cycle with a career development plan for all employees. Erica Dias, VP of Marketing, Communications and Community Banking was looking for a way to provide further insights for her team in 1) building out that development plan and 2) to include a path to promotability.

**How They Did It:** Dias, who holds an MBA with an emphasis in ethical leadership and is a doctoral candidate in Transformational Leadership, has a passion for developing high-performing teams. Because of her background, she understood that each member of her team would experience a unique journey across their current and future roles and could benefit by having a way to own their leadership development, with a tool that they could revisit over the lifetime of their career. With no extra cost to the process other than the time to train the team and 1:1 meetings, she quickly and easily rolled out the PI assessment to a pilot team of approximately 40 individuals. Over the course of a full year, which traversed two review periods, the team was able to adopt the program without any complications or concerns - and fit it in their very busy schedules.

Dias was pleased to learn that her hope of the PI allowing for a personalized experience was confirmed; the enthusiasm from the group validated that everyone wants to advance and develop in some way.

- 100% of participating employees welcomed the candid feedback and detailed guidance on areas where they could grow.
- 70% were interested in promotion; 30% were happy staying in their current role and gained performance insights. 100% received insight into specific actions to incorporate into their development plan.
- 60% were on track for promotion in the next 3 years
- Dias used the PI as an integral part of grooming her eventual successor
- Having a methodology and common language to work from also gave the team a more comfortable way to approach some of the tougher issues they needed to address.