

Creating Organizational Alignment



Involving sponsors and key stakeholders in the planning process helps build support and alignment. We assist by giving direction on issues such as program emphasis, roll-out timing, and how to integrate the credit union's overall goals and priorities into the training. A steering committee should be convened to review the training objectives, identify resources within the organization necessary to support the desired outcomes, clarify roles and responsibilities, determine implementation strategies, and identify key questions to be tested in field research.

■ The Steering Committee Member Role

- Provide input on the training implementation and process
- Ensure the organizational readiness necessary to achieve results from training
- Highlight key credit union processes, policies, and products to be integrated into the training
- Recommend adjustments to address potential credit union barriers
- Identify baselines of sales and sales management performance
- Orchestrate senior management ownership and involvement
- Create organizational excitement around the training
- Ensure that performance management and reward systems reinforce the training
- Ensure the content of the program captures the credit union culture and most critical organizational issues

■ The CUNA Performance Consultant Role

- Recommend and customize the agenda for the steering committee planning meeting
- Facilitate the steering committee planning meeting
- Provide tools and methods to assist the steering committee in analyzing key information to plan and make critical implementation decisions
- Recommend follow-up steps to ensure the credit union reaches desired outcomes

■ For information about how to bring this training system to your credit union, visit training.cuna.org/cml, call 800-456-0543, or e-mail cml@cuna.com.