

Align Your People and Places for Optimal Success

Today's physical environments require a new people approach

The physical design of today's credit union branches and operations centers is undergoing a radical transformation. The traditional models of work are outdated and have given way to more open and collaborative concepts. These changes are far more than just architectural and aesthetic – they are being made to greatly enhance the experiences of both members and employees.

Unfortunately, too many credit unions don't realize the full financial return on their capital investment because they've approached the change purely from a design standpoint. They've failed to sufficiently invest in the "experience" side of it, as well. Employees aren't trained in how to function confidently in their new environment and/or their personality simply is not a good fit for it.

Let's consider two common scenarios where greater alignment of people and place is needed:

- 1) A beautiful new branch with an open concept and "universal" model. Using the same staff from the old, traditional-style branch can be a recipe for disaster. Tellers, for instance, who are used to standing or sitting behind a fortress (i.e., teller line) are now expected to approach members as they come in the door and conduct a transaction while standing side by side at a pod.
- 2) A magnificent new operations center, or headquarters, with lots of gathering places. Employees are used to working in cubicles and sharing one or two meeting rooms. The vast majority of their working time is spent in one of those two places. In fact, many managers judge their team's productivity by how much time they spend in their cubes and in front of their PCs.

The Personality Impact

For some people, making this transition from old to new will be invigorating, even liberating; for others, however, it can be a nightmare and lead to reduced performance and increased turnover. Change – especially physical change – is much easier for some people to accept than others.

The psychological aspect of these changes warrants heavy consideration. Employees felt comfortable in their previous environment. Now, they're being removed from those safe places and expected to quickly assimilate into a totally new and distinctly different environment ... with little or no acceptance of any negative impact on production.

Introverted, highly analytical employees often struggle when repositioned to high-traffic, open-air spaces. Conversely, expressive, outgoing, relationship-driven employees may feel stifled and grow frustrated if positioned in an office or cubicle. Credit union leaders need to be very diligent when physical design changes are made and staffs are redeployed.

Environmental psychology proves that physical spaces dictate human behavior. For instance, moving from a private, lower-volume space into a high-volume, high-visibility space may cause apprehension, anxiety and mental fatigue that degrades performance and, especially in branches and contact centers, diminishes the member experience.

Consider the Zone

Following are four examples where staff personalities need to be tightly aligned with their new work zones:

- The Engagement Zone

We've all heard about the power of first impressions – in our business and personal life. Well, in your new physical spaces, that impression pertains to the new place as well as the people working within it. Employees and members can be blown away or blown off by the first impressions they experience.

Further, the design of those spaces is often open and inviting. So, it's imperative that the people working there are equally inviting. The required personalities include being approachable, hospitable, empathetic, and exuding positive energy. These traits may have a different priority in an operations center versus a branch, but they are still near the top of both lists.

The necessary skills to succeed include making strong engagement quickly, personalizing the conversation, and being highly perceptive to clues, including what the member says and how they say it. While these are teachable skills, to an extent, only those employees with a certain personality type and enthusiasm level will be successful in delivering the desired positive experience, the first time.

- The Transaction Zone

In most cases, operating systems don't change during a move so your employees still need the same level of operational knowledge and skills. After all, they'll still be responsible for processing transactions accurately and efficiently.

What changes, however, in the new branch world is the fact that the member will be right next to you. Even though cash will be stored in a recycler instead of a drawer, employees are often uneasy about members being within arm's reach of the cash.

The personality in the branch still needs to be possessing attention to detail and being highly organized, among others, but it's now also being agile in their conversations with members – being conversational while keeping focus on the operational transaction at hand.

In the new operations center, employees may be conducting their normal transactions in a community pod instead of a personal cube. They may be in an office now where previously they were out on the floor. Further, they now have the ability to conduct their transactions at various stations and gathering places throughout the building.

For them, the personality match will need to be versatile. They can't spend all their time in a lounge area away from their teammates nor should they be holed-up in their cubicle or

office. They need to balance social traits with personal ones to a much greater extent than before.

- The Consultation Zone

In most new branches and headquarters, there will still be offices used largely for quiet conversations. In a branch these offices will typically be for consultative conversations with members where personal and financial information will be discussed. In the operations centers, they'll be for personal coaching consultation between managers and direct reports. In both instances, the quiet spaces will serve as a tranquil escape from an otherwise noisy and hectic office. Thanks to advanced acoustic materials that minimize sound and furniture that provide a comfortable and relaxed environment, using these offices often provide the calmness needed for private conversations and detailed consultation.

Individuals who perform in these offices need to present themselves with a consistently calmer, lower-key attitude. In the branches, and like the zone's name, they too need to possess a consultative style where they're utilizing the quiet to ask deep questions and engage in an active two-way dialogue. In the operations center, a similar type of consultation will usually be between teammates.

- The Collaboration Zone

Maybe the greatest feature of the newly designed branches and operations centers is the great amount of collaboration space built into them. Whether it's a high-top table near the coffee bar or lounge areas with couches near the elevators or an enlarged kitchen with multiple ovens and mini fridges, these new places are magnets for bringing people together – both employees and members.

However, don't assume that people will automatically utilize these spaces; many will need to be encouraged to take their laptops there to finish work or conduct meetings there with their team. Employees who have been successful, in part, because of their intense focus and isolated processes may struggle in the collaborative spaces. Those personalities that may have led some to label them as "introverted" are now being asked to step out of their comfort zone and become much more social and collective.

Conducting games and contests can help get staff out of their normal space and into the new ones. Training them on better interpersonal skills can help. Using spaces for team meetings and project meetings can also help in this effort. In branches, some transactions don't need the privacy of an office and, therefore, employees can be encouraged to do them in a lobby nook.

In the end, each of these zones will only return value if they get used regularly and you are proactive in training and encouraging staff to use them. Don't expect that change to occur easily or quickly; don't think that it's such a cool new design that every employee will gravitate to the unique



features; and don't proceed believing that employees who performed well (even your top performers) in the old environment will perform equally well or better in the new one.

Let the experts design an impressive new branch or headquarters/operations center but don't forget to also design a transition plan for your people. Fit their personality traits and preferences to their new roles in the new working environment. Train them on the new skills necessary to excel in their new environment. And keep very close tabs on staff's attitudes and production in the very early days in their new environment.

If your credit union is redesigning an existing branch or operations center or, especially if you're building a new one, our consultants can help with that critical people transition. We've helped many credit unions in recent years and have a dedicated process to position you for maximum success. Contact us at www.fi-strategies.com/contact or 636-578-3280.