

## Client Profile: Financial Pacific Leasing, Inc.

### Leadership Training Program

#### **The Need:**

As a subsidiary of Umpqua Bank, Financial Pacific Leasing, Inc. is a direct provider of small-ticket commercial equipment leases that help companies to grow by financing their acquisition of new and used equipment. The hiring of seven new staff members in 2010 comingled with experienced Financial Pacific Leasing employees contributed to a broad array of management and supervisor styles. The Corporate Office identified the need for a consistent management and leadership throughout the organization. They originally contacted Invista Performance Solutions (IPS) in the fall of 2010 to assist with the development and delivery of the Financial Pacific Leadership Training Program onsite for mid-level managers and supervisors. In 2015, IPS followed up with a visit to Financial Pacific and as a result was contracted to provide the services again.

#### **The Invista Performance Solution:**

IPS dedicated a team to identify the critical areas of development for participants. To validate training topics, IPS administered the StrengthsFinder 2.0 online leadership assessment to participants. Instructional designers developed the training curriculum around the major themes reported in the online assessment and a series of 11 workshops were delivered in 2011. "The benefit of working with IPS was that we were able to develop a customized Leadership Training program with access to multiple resources and support we do not have available in-house," reported Heather Bolek, HR manager. "The staff at IPS worked hard to ensure the program was developed to our needs, implemented effectively and executed to our expectations. Each person that we worked with was professional and provided excellent service."

Prior to each workshop, curriculum was reviewed to confirm alignment with client expectations. Each workshop was evaluated, the results tabulated, and reported back. "Our project manager worked as a team member with us throughout the program, arranging and participating in pre-class conference calls with the instructor, introducing each class session, and following up with evaluation results. When adjustments to the program or an instructor were needed, all were handled promptly and effectively," Bolek affirmed.

Documented learning outcomes and program impact of all 11 workshops were included in a final report for the client. 90% of participants rated the facilitators' interaction with participants as very good to excellent. IPS worked developed in-box reinforcement learning activities that reinforced the learning and were delivered to participants by email in 2012.

In the fall of 2014, Heather Bolek requested that the 2011 program be modified and delivered again to high potential leaders as shown below.

### **Courses in the Financial Pacific Leadership Training Program:**

- Fundamentals of Supervision, Motivating Others and Delegation of Work (2011)
- Attributes of High Performance Teams (2011)
- Communication Skills for Supervisors and Managers (2011 and 2015)
- Setting and Monitoring Performance Expectations (2011 and 2015)
- Effective Presentations (2011)
- Meeting Management (2011)
- Authentic Leadership and Emotional Intelligence (2011)
- Developing Others and Managing a Multigenerational Workforce (2011 and 2015)
- Managing Difficult Employees (2011 and 2015)
- Creating a Healthy Work Life Balance (2011 and 2015)
- Facilitation Skills for Managers (2015)

The 2015 series included a one-hour follow-up meeting for each session to reinforce learning objectives and increase on-the-job application. Both the sessions and the hour follow-ups were evaluated with the standard IPS evaluation. 92% of participants rated the workshops as very good to excellent and 95% rated the facilitators' knowledge of subject matter as very good to excellent.

Following the Developing Others and Managing a Multigenerational Workforce, one participant stated, "I would like to be able to incorporate all of the information we learned every day (of this series). It would make me a much more effective supervisor." And in response to the Managing Difficult Employees, a participant said, "Very helpful material that needs to be applied in the workforce. Very helpful tools for those hard to deal with employees."

### **Unique Program Aspects:**

In the 2015 series, Financial Pacific's program series was funded by Washington State's Customized Training Program (CTP). Under the CTP, the State Board for Community and Technical Colleges (SBCTC) pays the costs up front for customized training and the business repays the costs while gaining a B&O Tax Credit of 50% of the total.

### **2016 Leadership Development and Beyond**

Summative evaluations surveys were sent to 2015 participants and modifications were made for the upcoming 2016 program based on these suggestions. Participants in 2015 agreed that Managing Difficult Employees, Developing Others and Managing a Multigenerational Workforce, and Creating a Healthy Work Life Balance were the most valuable sessions of the series and should be repeated for all new managers.

The 2016 Leadership Series will focus on these courses, utilize the same facilitators, and access CTP funding. The one-hour follow up sessions were also of great value to the participants and will again be implemented in the 2016 series.