

## Sky Financial Gains Employee Intelligence for Repositioning Efforts

### Background

Sky Financial Group is a \$12.7 billion diversified financial holding company and is among the 50 largest bank holding companies in the nation. With more than 250 financial centers and over 250 ATMs serving communities in five states, Sky Financial's goal is to transition itself from a top-level "banking" organization to a leading financial services provider.

### Challenge

To make this transition, Sky must ensure its staff has proficient knowledge and competency in a wide range of areas.

With dispersed locations, it is sometimes difficult to assess the training needs for each employee and financial center. As a part of a financial services strategy, it was critical for Sky to identify its staff's competencies as well as areas that require development.

The company decided to conduct a gap analysis of the skills of its financial center and operational managers (team leaders) in seven key areas, including: personal data (i.e. tenure, education, computer skills), understanding of organizational profitability, employee relations, deposits and loans, insurance, trust and investments and small business or operations, depending on the employee's role.

### Solution

Sky turned to PeriscopeIQ to make certain that its assessment was aligned with its strategic goals. PeriscopeIQ took Sky's paper-based survey, which could have taken months to create, distribute and analyze, and created a valid, online assessment and deployed it to the target audiences.

PeriscopeIQ consulted with Sky to ensure a robust survey by creating specific, strategic questions addressing each of the seven core areas, organizing the survey for easy analysis and segmenting the audience into proper groups to obtain effective results.

Three online surveys were deployed in just weeks to more than 400 employees. The first was distributed to a pilot group to ensure its validity and the other two were for the financial center and operational managers. Because some employees did not have access to email,

PeriscopeIQ used a medley of deployment techniques including authenticated invitational email, intranet links and a few paper assessments and then consolidated the results online from the various sources.

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"We had many customized requests for PeriscopeIQ due to our diverse technology landscape across financial centers," said Jeri Close, VP of Training for Sky. "PeriscopeIQ was able to meet all of our special requests for deployment, reporting and segmentation without slowing down the process. And, the ease of use of the solution enabled us to analyze the data using PeriscopeIQ's "wizard-like" reporting capabilities without technical assistance."

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In addition to the in-depth analysis that PeriscopeIQ provided, Sky wanted a letterform report sent to each respondent thanking him or her for taking the survey and identifying his or her strengths and development needs. PeriscopeIQ developed algorithms to produce this custom report, and, with one click, the report was sent to the individual.

### Transformative Intelligence

In today's competitive business environment, it is critical for organizations to act quickly to meet the demands of the marketplace. Sky needed to gain immediate intelligence on its employees' competencies in order to provide the necessary training and development programs to help transform the company into a leading financial services provider.

"PeriscopeIQ created a valid, robust online assessment and quickly deployed it to the target audience in order to identify their strengths and areas of development," explained Close. "Through the strategic analysis of the results, we are now able to design an effective, corporate-wide training and development plan."

"The entire process took about 1/5<sup>th</sup> of the time it would have taken with the traditional, paper-based method and we achieved a 96% response rate," added Close. "The time savings in creating and deploying the assessment and analyzing the results alone made the solution cost effective."

"Considering that we were able to capture this critical intelligence on individual employees was instrumental in assessing our overall corporate training and development needs," said Close.