

# CASE STUDY | **UNION BANK OF CALIFORNIA**

Compendium helped a leading regional bank foster a stronger culture and live its values through every employee.



**COMPENDIUM™**  
INCORPORATED

**SITUATION:**

Union Bank had invested heavily in a system-wide reward and recognition program for 300 branches. The program was supposed to inspire employees

to new levels of sales and service excellence, but it wasn't working. With only 120 days remaining before the program was to be re-launched, Compendium was called in to re-design the program.

# Union Bank of California

## Uniting 3,000 bank employees around a new vision of sales and service excellence.

**SOLUTION:**

To breathe more meaning and significance into the workplace, Compendium helped top executives articulate an inspiring new Vision, Mission and Values for the bank. The new Reward & Recognition program was then tied directly to the Vision, Mission and Values. Instead of being recognized for "smiling at the customer," employees would now be recognized for "exemplifying the bank's Core Values—Spirit, Communication, Commitment, Excellence and Celebration."

From there Compendium created and delivered a turnkey program in less than 90 days, including: Logo re-design, branding and collateral development...program implementation kit for all

managers...custom design and fulfillment process for 20,000 awards...daily, weekly, monthly and annual recognition components...strategic communication plan...and year-end celebration. Included were program architecture, creative development, ghost writing, tracking, measurement and fulfillment.

Employee interviews indicated that bank employees felt uninspired about their work. ("I'm just a teller—what difference do my efforts make in the world?") Employees also felt uninspired by the previous reward and recognition program which rewarded routine behaviors such as smiling at the customer, or using the customer's name in conversations.



Program Signage and Posters

*Employee Reward Cards*



To find out more about Compendium's innovative employee communication programs go to [www.work-inspired.com](http://www.work-inspired.com)

*Memo Pad and Program Brochure*



## RESULTS

In year one Union Bank managers recognized their employees for nearly 100,000 extraordinary “moments of truth” with the customer. Morale and customer satisfaction went up, and turnover went down. The bank recorded one of its most profitable years, including the highest ROI for a single quarter in company history—plus Compendium delivered the program for less than half the budget of the previous year. The program was repeated in fresh new versions with Compendium for six consecutive years.