

## CLIENT SUCCESS STORY

# EQ Improves Relationships and Collaboration

Ally Financial Inc. is a financial services company with the nation's largest all-digital bank and an industry-leading auto financing business, driven by a mission to "Do It Right" and be a relentless ally for customers and communities. The company serves approximately 11 million customers through a full range of online banking services (including deposits, mortgage, and credit card products) and securities brokerage and investment advisory services. The company also includes a robust corporate finance business that offers capital for equity sponsors and middle-market companies, as well as auto financing and insurance offerings. Ally's "Do It Right" culture is a driving force behind its investment in the learning and development of their people.

## THE CHALLENGE

Kathie Patterson, the Chief Human Resources Officer at Ally, believed there was a strong business case for Emotional Intelligence (EQ) training as a premier offering for employee development, which led to Ally rolling it out to teammates in 2017. Then COVID-19 and the return to office heightened the need for everyone to be aware of how they interact with others to build strong relationships and effectively serve their internal and external customers.

“ At Ally, we take a people-first approach to everything we do. Our name is our purpose and EQ helps us deliver in a way that aligns with our core values. ”

— Bill Mulvihill Jr., Lead Training Facilitator

Additionally, the Learning and Development team sees a strong fit between Ally's core values and TalentSmartEQ's program. Ally's core values – Look Externally, Execute with Excellence, Act with Professionalism and Deliver Results – embodies its people-first focus and reinforces the importance of building human connections within the company and with the customers they serve.

## AT A GLANCE

### Challenge

Improve EQ skills to build stronger human connections within their company and with the clients they serve.

### Solution

- Emotional Intelligence Appraisal – Self Edition
- Emotional Intelligence Appraisal – Multi-Rater Edition
- Mastering EQ Level 1
- Mastering EQ for Teams

### Results

- More effective leaders and managers
- Better relationships
- Increased collaboration and problem-solving
- Increased ability to handle negative emotions

## THE SOLUTION

Kathie's Learning and Development team led the charge to research Emotional Intelligence training solutions to address Ally's needs and selected TalentSmartEQ's program, including the Self and 360° Assessments and Mastering EQ Level 1 training program.

The Emotional Intelligence Appraisal® – Self Edition provides participants with personalized information about their current EQ level, including their natural strengths and opportunities for development. The 360° Edition provides participants with feedback on how others perceive them and identifies gaps between their self-perception and the ratings from their boss, peers, subordinates, and others. These differences help them to recognize their blind spots and prioritize key areas to develop.

After completing the assessment, participants then attend a virtual or in-person training session that provides an overview of emotional intelligence, allowing participants to understand the 4 core skill areas – Self Awareness, Self-Management, Social Awareness and Relationship Management – and develop action plans to improve their individual EQ skills.

Ally implemented a train-the-trainer approach, certifying Bill and three other trainers within the organization so they could cost-effectively offer the training to their 11,000 employees at various locations.

**“ The TalentSmartEQ team has been so helpful in equipping me with the content and skills I need to deliver the training and maximize the impact to our team. ”**  
— Bill Mulvihill Jr., Lead Training Facilitator

Ally offers open enrollment classes each month in both live and virtual formats. They have trained over 2,200 employees to date in Mastering EQ Level 1 and have seen the impact of having a common language to discuss emotions and behavior on relationships, team collaboration, and business results.

“When I do an EQ training, I love when employees are transparent and vulnerable and have open conversations about how we think we come across and how we are actually perceived,” said Bill. “One of the hardest things to do is to control our triggers. I want our team to know it's OK to feel the way they do but learn how to best manage their emotions in an office environment, to best represent themselves and Ally.”

As a follow-up enhancement to their EQ program, Ally wanted to take their EQ training to the next level and build emotionally intelligent teams to increase collaboration, effectiveness, and performance. The Mastering EQ for Teams program helps teams evaluate collectively how they manage their emotions and then develop strategies and an action plan to improve how they work together both within the team, cross-functionally, and with external partners. Ally successfully piloted the program with 50 people, a mixture of leadership and their direct reports and is looking to add the EQ for Teams program to their offerings next.

## THE RESULTS

Ally has seen a significant impact from its EQ training program, citing more effective leaders and managers, better relationships, and increased collaboration and problem-solving. In their feedback, participants found the training to be engaging and valuable, particularly in helping them to manage negative emotions and giving them a roadmap to improve their EQ skills to improve their relationships both at work and in their personal lives.

**“ EQ training helps us become better teammates, builds better relationships and results in better collaboration. It drives our business and is integral to our award-winning culture. ”**  
— Kathie Patterson, Chief Learning Officer