

# 146 Lesley TD Skills Taxonomy

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By Lesley Sears

**Lisa Hochgraf** 00:04

You're listening to the CUES Podcast episode 146.

**Lisa Hochgraf** 00:08

Welcome to the CUES Podcast where leaders and experts discuss the top topics in credit unions today. I'm Lisa Hochgraf, senior editor at CUES and your host for this episode.

**Lisa Hochgraf** 00:19

In the show we explore skills taxonomies, what they are and why your credit union needs one as part of its overall talent strategy. Our guest is CUES' own VP of consulting, Lesley Sears, who heads up our CUES Consulting offerings.

**Lisa Hochgraf** 00:36

As I say in the show, when I think of the term taxonomy, I think of high school biology and learning about kingdom, phylum, and so on. Lesley says skills taxonomies are very similar. They're systems for classifying and then thinking about all the skills that everyone at your credit union has. It turns out that making the mindset shift from focusing on roles to focusing on skills opens up a lot of opportunity for people strategy, as Lesley explains in more detail in the show.

**Lisa Hochgraf** 01:07

For example, if you were to stop thinking about member service representatives and marketing specialists, and instead think John excels at member service and accuracy, and Savannah is fantastic at creative brainstorming and using desktop publishing tools, you can start to see what complementary skills each person would benefit from learning. You might also start to know when you might want to invite particular people to be part of cross-functional teams because of the skills, not title, they would bring to the table.

**Lisa Hochgraf** 01:40

And importantly, with a skills focus, you can more effectively formulate an organizational vision about what skills your credit union's team doesn't have yet at all and needs to acquire to propel your organization forward toward a more successful future. After all, like the title of the Marshall Goldsmith book says, "What Got You Here Won't Get You There."

**Lisa Hochgraf** 02:03

Lesley talks in the show and with her CUES consulting clients about the far-reaching benefits that can come from a skills orientation when doing people planning. Her expertise is cutting-edge stuff from the

world of talent development that could help credit unions become ever more agile when competing against far larger institutions and, of course, get better at serving the changing needs of their members.

**Lisa Hochgraf** 02:26

I'll be really interested in your key takeaways from this conversation. So let's get started.

**Lisa Hochgraf** 02:34

Welcome to the show, Lesley.

**Lesley Sears** 02:37

Lisa, it's nice to chit-chat with you today. I'm excited about our conversation.

**Lisa Hochgraf** 02:41

It's been really fun getting to know you better. I've enjoyed writing your blog, and now we're doing a podcast, and pretty soon there will be a video. So, our listeners are gonna have a lot of choices after they listen to the show about additional content they might want to check out.

**Lesley Sears** 02:55

Fantastic yes. I think you and I make a good team so this is fun.

**Lisa Hochgraf** 02:59

Yeah, and you're really all about team-building. And I think it's gonna be fun over time to have you many times on the CUES Podcast to talk about CUES Consulting and talent development, which are very much your areas of expertise. But before we get into that, I wondered, would you have a quote or a mantra that you use to guide your professional life that you could share with our listeners so they can get to know you just a little bit more?

**Lesley Sears** 03:22

That's an awesome question. Let me think. Yeah, you know, I had a mentor years ago that was really kind of one of my process consulting mentors because you know, you have different windows of people that you trust and listen to advice from, and the thing that she told me is, appreciate that you don't know, ask questions strategically, and listen to the answers intently. So really getting into that, especially from consulting, you don't know what you're going to walk into. So make sure you're asking the questions that are going to get to the bottom of the answers. And then listen and listen between the words, right?

**Lisa Hochgraf** 04:07

Yeah, yeah, I once as a journalist, I once heard a great story about a reporter that was disappointed because there was a really specific detail on the story that she had covered that a competing paper had printed, but she hadn't gotten. And when she went back to the police person who was on the scene where she was reporting, she said, Why didn't you tell me that? And he said, You didn't ask. Really important to ask a lot of questions, too, sometimes.

**Lesley Sears** 04:34

Yeah, absolutely. Well, and again, I like listening in the quiet part. Because often even the questions that you ask, there's answers that aren't directly answered, but they are, kind of, if you listen well. So then, you know, other questions to ask, right?

**Lisa Hochgraf 04:53**

Definitely. One question leads to another. That's about what that's just what's going to happen here.

**Lesley Sears 04:59**

All right. Let's do it.

**Lisa Hochgraf 05:00**

I have a question for you to sort of get started more talking about talent development. So Lesley when we were talking recently, you mentioned that an important foundation of a successful credit union talent development program is a skills taxonomy.

**Lesley Sears 05:14**

Yeah.

**Lisa Hochgraf 05:15**

But when I think of the word taxonomy, I don't think of talent development. I think of what I learned in biology class in high school, a system for classifying plants and animals like kingdom, phylum. How would you define taxonomy in the context of talent development?

**Lesley Sears 05:29**

So it's a great word, isn't it? And I love I love that they attached it to skills. It really is similar, right? It's just a different way of looking at the skills within your credit union. So much like, you know, within biology, you classify different taxonomies, you do with skills as well. And it's an up-and-coming learning and development philosophy. And it really has caused a lot of excitement within that industry, just because it's such a great way of being more agile as a credit union, of not being weighed down by some of those heavy job descriptions that nobody ever follows. And really, you can't. It's difficult to pull the data from. So it's a great way of looking at your credit union, specifically your credit union, and deciding what does success teeter on, like within our credit union, what does it what, what does success skills look like? And then once you identify those, beginning to classify them, and putting them into kind of a quantifiable perspective, and skills or capabilities, right, what does your credit union need to do really well, to be successful in whatever your objective is? So it's, and I say this to you all the time, it's really taking that people strategy that we all have, right, within all credit unions, they should have a people strategy, and aligning that with the overall objectives of the credit union. What are we trying to do? What is what are our what is our strategy, our goals, our objectives for the next year or three years or five years? And it's attaching those success skills to that alignment.

**Lisa Hochgraf 07:21**

So the classifying part? Excuse me, the classifying part? Are you like looking at all the skills you have in the credit union and saying, "Okay, these are leadership skills and these are managerial skills and these are individual contributor skills?" Or is it more like, connecting what you said, the business

objectives of the credit union to the skills you have? So these skills are the skills we need to help us with our technology savviness. And these are the skills we need to make sure our board is delivering vision.

**Lesley Sears 07:52**

Yep. Yeah, it depends on how you want to address it initially, like what what is the launching plan look like? Because you can look at them, you can look at your skills by department, you can look at your skills by position, you can look at your skills overarching within the credit union total. And that's kind of what you just described, you could break them into technical, you can also break them into leadership, management and individual contributors. Because the research behind the skills that really attach themselves to those three levels within an organization have been researched and found to be very sound over the last 50 years. So that's often what we do. We'll end up if somebody wants to do credit union-wide skills taxonomies, we'll break them into leadership management and individual contributors. And then once you do that, you can go deeper and deeper and deeper, as you get more data as you answer more questions, that makes it easier to go deeper into the organization to the credit union.

**Lisa Hochgraf 08:59**

So kingdom, phylum, and I don't remember what comes next, maybe it's class, but you start getting lower. So if I translate that into what I'm thinking this all means for talent development, then we have like, a skill of delegation. And maybe below that we have, like, specialty skill for delegation for lending or specialty skill for delegation for running a branch. Is that kind of what we're talking about?

**Lesley Sears 09:26**

Yeah and think of them kind of as the within the job description. So the way that somebody would have a job description. In every one of those positions, you can move from the job description into a skills-based answer. So rather than a branch manager, you're really taking the, you know, the bullet points, like every job description has those bullet points, and you're breaking those bullet points into skills versus tasks. So it's just a different way of looking at at the big picture.

**Lisa Hochgraf 10:02**

It kind of sounds to me like, if you have a skills taxonomy, and you're thinking in the context of skills, you might be pulling people from different parts of the organization who have skills you need onto a team who previously, you might have overlooked Oh, well, they're a teller, they're not gonna be able to help with this IT project. But it turns out, they actually have this really great skill for logistical planning. So we actually really want them on this team because they could really lend a hand.

**Lesley Sears 10:28**

That's exactly right. And that's one of the strengths of the skills taxonomy or the skills approach is you understand your workforce at a totally different level than you would if you are focused on more of a job description or a job title. Suddenly, the opportunity for projects and participants on those projects opens up in a huge way. So you're looking at the person, the individual person's set of skills. So along with the organizational skills, you're also shifting the individual people into a, into more of a deeper understanding of their total skill set because you don't necessarily know what positions they've come from. Right? I love the commercial with where the woman wears all the hats. And I kind of think about

that when I'm thinking of skills taxonomies. She has on a firefighters hat and the coach's hat and mean all of these different things that she has done in the past. The skills taxonomy really begins to identify that for the organization-wide, so people really understand who their workforce is, and what they're bringing to the table on any given day.

**Lisa Hochgraf** 11:44

And for someone like me, who's an individual contributor, it seems like that might help people take stock in what they're really good at like, "Oh, well, I'm getting called in occasionally for these other things because I have this particular ability that's useful to the organization." Do you see that?

**Lesley Sears** 12:00

Absolutely. And that's the projects or gigs, a big thing is what they refer to as gigs. So it's not necessarily a full project. But it's a just something within a position, let's say a project light, right? So it's a gig, there are very specific IT platforms that can really help in managing this because when you start talking skills approach, often people's top of their heads blow off, because it's like, how in the world are we going to manage this? There are fantastic IT options on managing this well, and they look at your skills, right, or the skills that your credit union needs to be successful. And they pull in the people skills. So each person you know exactly what their skills are.

**Lesley Sears** 12:48

Also gives you the opportunity as you're filling new positions, right, which is another huge strength of skills taxonomies. If I'm filling a teller role, I now have identified what skills that takes. And I can go out and recruit and interview for specifically those skills. So I'm not necessarily recruiting or interviewing for a position, but I'm really interviewing for the skills and take it to the next step--not only just the skills for that teller, but I'm looking at what do, what does my credit union need? Are there other skills

**Lisa Hochgraf** 13:26

overall

**Lesley Sears** 13:26

Yeah, are there other skills that my credit union is really lacking, because now we've identified what we know we need, what we have. And this is kind of where the gaps are, you can fill those gaps a couple of ways. You can either develop to the gaps, which is a fantastic option. Or you can hire to the gaps. So you don't necessarily just hire for a teller. You hire for someone with some with the teller skills. But then also, if there's someone that has the additional skills that you're filling for your credit union, you can include those as well. So it's really an agile way of staying cutting-edge within your credit union and really being robust in how you look for your replacement people.

**Lisa Hochgraf** 14:08

It sounds like such a powerful tool. And I have to think that maybe there's a listener that's out there saying that sounds great. How do I get one of those from my credit union? How do they get one of those for their credit union, Lesley?

**Lesley Sears** 14:20

So we have several tools that we utilize because one thing with the skills approach is it sounds very daunting, right? It's like, "Where do I start?" We have tools that we can actually help you fairly easily identify what those success skills look like and what they are, and you're not making them up, right, because that can be a tendency. There are research skills that really repeat themselves again and again and again that we know are frequently utilized. We can help you in identifying what your particular skills are within your skills taxonomy. And again, credit union-wide, department, person, individual position, we can really break it down a ton of different ways that way.

**Lisa Hochgraf** 15:04

That's wonderful to know that there's sort of a research base framework to use. So that's the kind of thing that you don't have to make it up from scratch. And there's a process to follow.

**Lesley Sears** 15:13

Yeah, that would be super daunting if you had to, like really sit down with a pad and paper and start, start filling them in. That would be really hard. So now we bring tools to the table, that we can make it much easier to begin to implement that and then also help with some of those job descriptions, giving just some guidance and what do you look for? And how do you break those down that what does that look like? So yeah, we can do a lot of help to that table for sure.

**Lisa Hochgraf** 15:39

Yeah. So how to give the job descriptions more of a skills approach. Is that right?

**Lesley Sears** 15:44

Absolutely. Absolutely. And then, like I said, subsequently begin to interview. Once we break those pieces down for you, then you can begin to interview we can help with that as well. Some of the interview questions, what are you looking for follow-up questions, those types of things, we can help with that as well.

**Lisa Hochgraf** 16:00

Very cool. I once had a former jockey apply to write for the magazine, that he was great because he had learned to type. And I was like, well, that is a good skill, what we might need a few more.

**Lesley Sears** 16:12

That's awesome.

**Lisa Hochgraf** 16:13

So let's say how is having a skills taxonomy a different approach to talent strategy and workforce planning than what's been used in the past?

**Lesley Sears** 16:22

Yeah, well, I think historically, within kind of the HR world, they tended to view employees, well, you said it more narrowly, right there at teller period, like they didn't go any deeper than that. They kept them within the boundaries of that position that they were in. And they had, you know, they hired to it, they managed to it, they everything they did internally as far as talent development was aimed at that.

So unfortunately, that is clunky, I like to say it's clunky. And it's a really kind of a slow method within an organization when when our org and our credit unions need to be much more, I use the word agile a ton. Because really being on the tips of our toes, when we're being able to move and change and shift and, and adjust and make the most of our workforce, that old way of the job description, organized in a employee file with no real way of accessing that person's skills. It just gives you there's no data access. You can't really know what skills that person or not even skills, like what experiences do they hav. If you're not even thinking skills, it's just a paper-heavy, hard way of managing the broad workforce, right? It's not very friendly to understand who your people are. And the thing that is real with skills taxonomies and just the skills approach is it prevents some of that unconscious bias. Right? Because DEI is a huge, the huge thing right now, and really finding unique and strategic and forward-thinking ways of addressing it. This is a fantastic way because it eliminates some of that unconscious bias that when you're looking at skills and not the particular person

**Lisa Hochgraf 18:15**  
and their experience.

**Lesley Sears 18:17**  
Yeah

**Lisa Hochgraf 18:17**  
experience so far been able to do so far. But what can they do?

**Lesley Sears 18:22**  
Right, exactly, exactly. It eliminates some of that potential. Unconscious bias is hard, because it's unconscious. Right? You don't even know you're doing it where this helps to eliminate some of that even from the equation.

**Lisa Hochgraf 18:35**  
That's another great reason to consider shifting your thinking about talent development from role and position maybe to skills.

**Lesley Sears 18:44**  
Yeah, absolutely. Absolutely. Well, and again, like we said before, you don't have the level of detail about the person, right? The people that you are bringing into the workforce, unless you know, all of their skills, right, no matter just where they're within your credit union, but everything that they've done. Everything they're bringing to the tab. Unless you know that you're leaving things on the table, you're leaving things that they're never going to be asked to do, are never going to even you're never going to know they can do them. Because you didn't ask the question.

**Lisa Hochgraf 19:18**  
Yeah. So when we talk about people bringing their whole selves to work

**Lesley Sears 19:22**  
This is it

**Lisa Hochgraf** 19:22

But we've ignored 30% of the things they could possibly do.

**Lesley Sears** 19:26

Or 60.

**Lisa Hochgraf** 19:27

Losing out right 60% It goes that high, you think.

**Lesley Sears** 19:30

yeah, oh, for sure. For sure. Because you think about people that are in their career for really any amount of time. And when they get hired just how, how slim, often the skills that they need to use for that job description, compared to their entire self, how slim that is. And this just opens the door. It just opens the door for that. So imagine how excited employees are right when they can bring all their best self to their workforce, their team, their credit union. So yeah, it's exciting. It's an exciting way to look at everything. And then

**Lisa Hochgraf** 20:08

I wonder if the CFO gets excited too. Because it sounds to me like this has the potential to make talent management more effective. You were saying, like, reams of paper and not very efficient about previous approaches. Right? So does this have the potential to streamline and make more cost-effective, our people efforts?

**Lesley Sears** 20:29

Absolutely, well, imagine that focus that you can have. So you, the CEO, the CFO, the everybody within the credit union, understands what the objectives are, you know, the mission, you know, the vision, you know, the objectives, and anything that the people strategy can do to make that work better, or make that work, make your resources go further. You've got a team of people that want to move toward that objective. And I think often their hands are tied, because they're in the position that they're in, where they're not necessarily always doing all that they could do. So when you begin to open up that data floodgate, when you first understand, you begin to understand what you as a credit union need with your skills because I think often because skills have been so underused, credit unions or organizations don't know, they don't know, they've never looked at it that way before. They know what positions they need. But they don't really know the skills. People have skills. People don't have positions, right?

**Lisa Hochgraf** 21:38

That's right.

**Lesley Sears** 21:39

Yeah. So when they begin to unfold what those skills look like, for the success of the organization, and then they go to the people and begin to identify what skills they have within the workforce as a whole, that's an exciting way of beginning to really drive toward that objective in a more focused way. Imagine how much easier and better it is to develop people to skills, you know you need and skills, you know



they have, but maybe they need them at a different level. Maybe they're intermediate, and they need to be excellent. Or maybe they're beginner, and they need to be excellent. So you can develop to skills that have been identified both within the organization and within the people. Resources go so much further.

**Lisa Hochgraf 22:29**

And I know you can help credit unions to figure out what skills they need, right? So there's a variety of processes that work together here to build what you do, right? I'm understanding that you talk to everyone in the credit union to find out what skills are needed and what are the success skills in that culture. And then you're finding out from the team members, what skills do you have, not just the ones for your current role, but just in general, and then you kind of weave those together to have a vision for where we're going and what we need to learn,

**Lesley Sears 22:59**

Right and identify the gaps, right? Ultimately, the goal is to identify the gaps, you understand what you need. You understand what you have. What weaknesses do we have, what gaps do we have. And we can create a plan that develops to those weaknesses. So yeah, so you can just utilize your workforce and their abilities in such a more streamlined, efficient, powerful way.

**Lisa Hochgraf 23:24**

That was to say, and even more full, right, even more for what you're doing. This is wonderful. And I'm so glad you're gonna be on the show again, because honestly, I love this topic and I could talk to you about it all afternoon. But since I know you need to do other things and maybe even work with some credit union clients this afternoon, I want to close up.

**Lisa Hochgraf 23:43**

Yeah, right. I want to close up by just asking you what is something that I didn't ask you today about skills taxonomies that you'd like to share with our listeners.

**Lesley Sears 23:53**

So within really people strategy in general, I think the thing that I see overlooked more often than not, honestly, is including the people in this process. Often, management or leadership gets together and they start determining what the skills are without really including anybody that has the skills. So I would say make sure that throughout the entirety of the skills-based approach lead in, right, or launch, that you're incorporating your people. Your people hold the power, right. They hold the skills, so incorporate them into discussions, get them excited, get their buy-in, help them see what the power for them along the way because the change to a skills-based approach, the success of the change will come through them. Ultimately, they'll come through them. So include your people, anything you do within talent development, make sure you include the people at the beginning.

**Lisa Hochgraf 24:57**

I love it Lesley. Credit unions are all about people and so having a really great talent strategy that appreciates people for who they are and what they can do just sounds like a perfect match.

**Lesley Sears** 25:07  
Agreed. 100% I agree.

**Lisa Hochgraf** 25:09  
Thank you so much for being on the show today, Lesley.

**Lesley Sears** 25:12  
Thanks, Lisa.

**Lesley Sears** 25:13  
We'll talk soon I'm sure.

**Lisa Hochgraf** 25:14  
Sounds wonderful.

**Lisa Hochgraf** 25:16  
I would like to thank you, our listeners for taking time out of your busy schedules to listen to today's episode of the CUES Podcast.

**Lisa Hochgraf** 25:24  
And many thanks to Lesley for sharing her expertise and insights.

**Lisa Hochgraf** 25:28  
Learn more about CUES consulting, which Leslie champions at [cues.org/CUESconsulting](https://cues.org/CUESconsulting).

**Lisa Hochgraf** 25:35  
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**Lisa Hochgraf** 25:51  
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