



IDC TECHNOLOGY LEADER SUCCESS STORY

TruStone Financial Credit Union:

Creating Exceptional Financial Experiences Starts with Investing in Our People

I Who Is TruStone Financial?

TruStone Financial Credit Union, a 2 time CIO100 Award Winner in 2023 and 2024, has exemplified what it takes to use technology to transform an industry and turn that into value for its customers. So what is at the core of this success? It's not just the investment in and innovative use of technology, though that's a critical piece. At its heart are the people driving innovation, those building and fostering a culture of empowerment and continuous improvement and investing in their leaders of tomorrow.

Gary Jeter joined the TruStone family in 2021 at a critical point in their transformation journey. We asked Gary what it takes to be recognized as a transformative player in this industry, and here's what he had to say.



I attribute a lot of the success of my leadership team to the coaching that IDC paired them up with. Because of the one-on-one coaching, I have seen my team grow and polish their executive presence, leadership skills and emotional intelligence.



■ Opportunity

At the onset, what led Gary to IDC was professional development. He wanted a partner that could connect him with other IT leaders, to learn from peers, get professional feedback, and ultimately grow himself as a leader. Beyond that, he was also looking for ways to showcase TruStone as an innovative leader transforming the financial services industry and to attract great talent. TruStone at the time had a research provider, but they didn't offer the leadership and development opportunities he was looking for. IDC offered the perfect solution and checked all the boxes Gary was seeking, and even more as it turned out.

■ IDC Solution

Where Gary's journey with IDC started was Council Membership with Board Prep which provided Board Training and Certification, a Coach, and CIO Executive Council Membership. As a Member, Gary was able to improve his understanding and interactions with the TruStone Board of Directors.

During this experience, Gary's focus began to shift - from his own professional development to that of his teams. While working with IDC, he learned about Pathways Leadership Programs. Gary enrolled his team of direct reports into Pathways and quickly started realizing the value of doing so by the professional growth he was seeing in his team, and expanded their membership to the next level of direct reports.

■ Outcome

The outcome of TruStone's partnership with IDC far exceeded the original intent. Not only was Gary able to develop himself professionally and drive awareness of the TruStone brand, through Pathways Leadership Programs he was also able to provide his team with mentoring and professional development from experienced global leaders. *"Pathways coaching has been brilliant. It has been well worth the investment by helping us move forward and focus on some of the right things."* Today, TruStone has 6 employees enrolled in Pathways Leadership Programs.

Transforming a culture is a journey, and in an environment of constant change and innovation, having a team you can empower and trust is invaluable. And having a company like TruStone Financial willing to invest in its leaders of tomorrow is business excellence at its finest.



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