

The Oklahoma Business Ethics Consortium



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MANY THANKS TO OUR NAVIGATOR MEMBERS:



Manufactured in Oklahoma City, OK, U.S.A.



MANY THANKS TO OUR STAR MEMBERS:

ENTERPRISE HOLDINGS.



Agenda – May 18, 2011

- I. **Welcome & Announcements** – Garyl Geist, President, OK Ethics; Chief Operating Officer, Oklahoma Allergy & Asthma Clinic
 - II. **Kudos: Compass Awards and Volunteers**
 - III. **Resolving Everyday Conflict – Graduates & Ongoing Workshops**
 - IV. **Intentional Interaction** - What was your best customer service experience? What elements made that experience worthwhile?
- Note:** OK Ethics encourages interaction among our members for the purpose of building relationships with others who share an interest in promoting Oklahoma values of integrity at work. At the same time, this is not an appropriate forum for sales activities.
- V. **Panel Discussion - “Building Trust in Customer Relations”**
 - VI. **Upcoming Events** – Shannon Warren, Founder, OK Ethics
 - VII. **Adjourn**

I. Welcome & Kudos

Congratulations to Compass Award Recipients:

L: Devon Energy (Larry Nichols), R: Coppermark Bank (Thomas Legan) and Ted Streuli of the Journal Record: Executive Pilot Award recipient



CPE CERTIFICATES

It is the responsibility of participants to demonstrate applicability of each program as it relates to his/her area of practice. OK Ethics makes no guarantees. Also, **attendees must be present** to accept CPE certificates and these will be issued at the back of the room upon the conclusion of the program. **Please note that we do not have the manpower capabilities to email these later.** CPE certificate recipients must be registered on our attendance list to receive a certificate, so please be sure to check in with the registration team.

Oklahoma Business Ethics Consortium Guiding Principles Adopted July, 2004

To ensure that the Consortium fosters positive characteristics of integrity in the successful achievement of its goals, these Guiding Principles were discussed and adopted (with revisions) during a milestone planning session held by Consortium leaders in Stroud on June 18, 2004. These principles were developed based on the Character First Institute's values and philosophies.

I. Responsibility to Self and Others:

- **Service:**
 - Passion for promoting ethics and integrity
 - Encouraging the promotion of ethical behavior through personal actions and
 - Sharing ideas and resources
 - Responsibility and accountability for fulfilling the mission of the Consortium.
- **Collaboration:**
 - Achievement of common goals through the promotion of ethical, mutually beneficial relationships
 - Service to the Consortium over promotion of self-interest
 - Cooperation emphasized over competition in promoting ethical business conduct
 - Members collaborate by being constructively engaged in discussions regarding ethics
 - Seeking consensus in interactive discussions regarding ethical matters.
- **Respect:**
 - Members may become aware of confidential information shared by others in an effort to determine an ethical course of action. We ask members to be sensitive in recognizing and respecting the efforts made toward achieving ethical behavior. In that vein, public disclosure of this information is discouraged.
 - We respect other members and the process by:
 - Exhibiting listening skills and actively listening to discussions
 - Being open to other points of view and outcomes
 - We are an inclusive organization and demonstrate this by welcoming members who are in different stages of learning as applied to ethical behavior.

II. Lead with Integrity

- **Dependability:**
 - Members are asked to demonstrate their support of this initiative by consistently attending meetings.
- **Initiative:**
 - Recruiting other members who have demonstrated a desire to promote ethical behavior in their organizations.
 - Recognizing what needs to be done to help promote the Mission of the Consortium and taking action to assist in that effort.
- **Honor:**
 - Members are asked to honor the Consortium through the practice of integrity and ethical behavior in their business dealings.
 - We express gratefulness to our hosts, sponsors and speakers.
 - Realizing that each of us is in a mode of continual learning, we demonstrate humility, care and compassion when sharing our thoughts and knowledge.
- **Courage:**
 - Speak the truth with confidence and encourage others to do the same.

III. Inspire Trust

- **We serve and promote the cause of truth with integrity, objectivity and fairness to all persons.**
 - We hold ourselves accountable by consistently honoring our word.
 - We extend trust abundantly to those who have earned it.
 - Trust, once earned, will not be taken for granted, manipulated or abused.

VOLUNTEER RECOGNITION:

OK Ethics has no staff and relies on volunteers to achieve the organization's successful pursuit of Oklahoma's values of integrity at work.



Registration Team: These dependable individuals show up every month to diligently record our guests' attendance and handle the collection of fees:

- **Mark Neumeister**, Co-Chairperson; D. R. Payne & Associates:
- **Mary Vaughan, CPA**; Co-Chairperson

- **Joe Walker**, Chairperson (Prepaid members); Grant Thornton
- **Marvinette Ponder**, (Prepaid members); Devon Energy

Ambassador Team: These friendly people welcome our guests each month and assist in helping them locate seats:

Team Leaders:

- **Tere Bettis**, Coppermark Bank: Co-Chairperson
- **Linda Streun**, Ideal Homes: Co-Chairperson

Team Members:

- **Arete Muse**, Vericrest Financial
- **Wayne Hart**, Prepaid Legal
- **Brent Martens**, Accounting Principals

CPE certificates – Michael Mount, Oklahoma Accountancy Board

Logistics: Jamie Potter, Eide Bailly

Name tags: Country Shelby Lynn, ONEOK Inc.

Accounts Receivable Reconciliation: Susan Pate, Stinnett & Associates

Join our team - Contact our leadership

- ✓ **Programs:** Shannon Warren, Founder, OK Ethics warrenokla@cox.net or 858-2233
- ✓ **Membership & Recruiting:** Shannon Hiebert, Vice President of Human Resources, Enterprise Rent-A-Car; Shannon.Hiebert@erac.com or call 330-9191
- ✓ **Public Relations:** Kellian Schneider, Owner, FullForce Branding & Marketing; kellian@fullforcebusiness.com
- ✓ **Ambassador Co-Chairs:** Tere Bettis, Vice President of Human Resources, Coppermark Bank, TBettis@coppermarkbank.com or Linda Streun, Director of Human Resources, Ideal Homes, lindastreun@ideal-homes.com
- ✓ **Registration:** Mark Neumeister, D. R. Payne; 272-0511; moneumeister@drpayne.com

OK ETHICS VISION:

To be recognized as a statewide and national forum for promoting business ethics.



PEACEMAKER[®]
MINISTRIES

SPECIAL WORKSHOPS OFFERED AT HOBBY LOBBY “RESOLVING EVERYDAY CONFLICT”

Contact Shannon Warren at warrenokla@cox.net
if you are interested in attending

Conflict is costly in the workplace (and at home)

- 22% of workers say they put less effort into work because of conflict at the office
 - Conflicts resulting in the loss of an employee can cost 150% of the employee’s annual compensation (managers ~ 250%)
- 60-80% of all difficulties in organizations stem from strained relationships, not from
Employers can lose up to 25% of an employee’s productivity due to family strife or divorce
deficits in skills or motivation

*****Seating Limited*****

First come, first served basis

*Note that this is a bonus program – cost to be determined,
but estimated at around \$50 per person that will include materials and lunch.
It is a Biblically-based program but is not preachy in content or tone.*

Recommended for 8 CPE’s

July 26 & 27

Four G’s of Peacemaking

- Go to Higher Ground
- Get Real About Yourself
- Gently Engage Others
- Get Together on Lasting Solutions

Four Promises of Forgiveness

- I will not dwell on this incident
- I will not bring this incident up and use it against you
- I will not talk to others about this incident
- I will not allow this incident to stand between us or hinder our personal relationship

Special thanks to Judge Bill Blew, Facilitator

Langston University (OKC Campus): Dr. Blayne Hinds

Oklahoma Christian University: Allison Garrett

Southern Nazarene University: Dr. Tony Griffin

Volunteers: Tere Bettis, Coppermark Bank and Dr. Deborah Burroughs, Langston

“Attending the Resolving Everyday Conflict course was a valuable use of my time. Not only did the course offer continuing education credits, it provided instruction on how to improve both my work and personal relationships.

I would recommend the course to anyone!”

– Rita G. Armer, Director, Internal Audit - The Hertz Corporation

Hats off to the Peacemaker Grads!



Carla	Driskill	Accel Financial
Renee	Kissler	Accel Financial
Richard	Reich	BancFirst
Tere	Bettis	Coppermark Bank
Janice	Dobbs	Devon Energy Corporation
Tammy	McKeever	Enterprise Holdings
Rita	Armer	Hertz
Victoria	Hawkins	Hertz
Tiffany	Price	Hertz
Angela	Smith	Hertz
Deborah	McIntyre	Hertz Corporation
Shad	Glass	Kimray
Deborah	Hill Burroughs	Langston University - OKC
Denise	Kennemer	Metro Tech
Shannon	Warren	OK Ethics
Wayne	Hart	Prepaid Legal
Kristi	Cooper	SandRidge Energy
Geron	Daugherty	SandRidge Energy
Kristin	Emerson	SandRidge Energy
Julia	Finch	SandRidge Energy
Debbie	Lee	SandRidge Energy
Brandy	Weldon	SandRidge Energy
Joy	LaBar	SandRidge Energy, Inc.
Marty	Michelson	SNU
Valerie	Hodges	Valir Health
Arete	Muse	Vericrest Financial

* List includes only OK Ethics Members; other participants are not included.

General Program Disclaimer:

Members of the Oklahoma Business Ethics Consortium frequently share information concerning various issues and developments that may have legal implications. The discussions, commentary, and handouts at Consortium meetings or presentations to other organizations are for general informational purposes only. They cover only some aspects of the subject topic, and do not constitute a complete legal analysis of the topic or how it might apply to any particular set of facts. Before taking any action based on information presented during a Consortium event, participants are encouraged to consult a qualified attorney. The observations and comments of presenters at Consortium meetings and networking are the views and opinions of the presenter and do not constitute the opinion or policies of the Consortium or any of its members. Presenters are respectfully requested to avoid profanity, preaching, politics and self-promotion during their lectures



**SUMMER BREAK:
OK ETHICS (OKC) WILL RECONVENE IN AUGUST**

TULSA OK ETHICS CHAPTER



Thursday, May 26

11:30 - 1:00

*****New Venue*****

**Doubletree Hotel Downtown Tulsa
616 W. Seventh Street**

Jim Stovall has been a national champion Olympic weightlifter, the President of the Emmy Award-winning Narrative Television Network, and a highly sought after author and platform speaker. He is the author of the best selling book, *The Ultimate Gift*, which is now a major motion picture starring James Garner and Abigail Breslin.

Steve Forbes, president and CEO of Forbes magazine, says, "Jim Stovall is one of the most extraordinary men of our era."

For his work in making television accessible to our nation's 13 million blind and visually impaired people, The President's Committee on Equal Opportunity selected Jim Stovall as the Entrepreneur of the Year. He was also chosen as the International Humanitarian of the Year, joining Jimmy Carter, Nancy Reagan, and Mother Teresa as recipients of this honor.

UPCOMING EVENTS FOCUSED ON INTEGRITY AT WORK (Not affiliated with OK Ethics)

For nearly eight years, we have been inspired by our friendship with the Character First Institute. Leaders with that organization provided the wisdom and insight for OK Ethics' Guiding Principles.



All events are by invitation only. To learn more about the Character First Institute, please contact John Burnett or Steven Menzel at 405-815-0001 for a personal invitation.

“BUILDING TRUST IN CUSTOMER RELATIONS”



Pete Winemiller
Senior Vice President,
Guest Relations
OKC Thunder



Celine Ferguson
Senior Vice President &
Chief Financial Officer
Coppermark Bank



Tim Hast
Consultant &
Corporate Trainer
Encore Life Skills LLC

PETE WINEMILLER

An NBA franchise executive for 16 seasons, Pete Winemiller currently serves as Senior Vice President of Guest Relations with the league's Oklahoma City Thunder.

Winemiller is charged with creating repeat customers in a business environment where you cannot control the level of success on the basketball court (the purchased product), but you can control what happens in the stands (the customer experience).

His department's efforts have been recognized by David Stern, Commissioner of the NBA, "for setting the gold standard for the NBA fan experience." In 2008 Winemiller and his staff led the implementation of a results-producing customer service program in the inaugural season of the Oklahoma franchise, under what Commissioner Stern called "the most compressed beginning ever in professional sports." Colloquy Magazine, Chief Learning Officer Magazine, the University of Massachusetts – Isenberg School of Management and the National Sports Forum have all honored Winemiller and the Thunder for exceptional work in the area of customer service. Most recently the American Business Awards recognized the Thunder with a "STEVIE," one of the nation's most prestigious business awards, as the 2010 "Front-Line Customer Service Team of the Year."

Winemiller has consulted with a number of NBA teams, other professional sports leagues and with organizations outside of pro sports regarding their customer-service models. He has been a keynote speaker and featured presenter at numerous

customer-service events, including the New York Customer Care Leadership Forum, the Society of Consumer Affairs Professionals, the North American Conference on Customer Management, the Customer Care Institute, the Conference on Achieving Customer Service

Excellence and Arizona State University's "Compete through Service" Symposium. Winemiller has been an adjunct professor at Arizona State University and the University of Washington, as well as a guest presenter at the University of Oregon and the University of Oklahoma, sharing his business perspective with undergraduate students, graduate students and business executives.

As the author of many articles on customer service, Winemiller has been quoted in several national publications including FORTUNE Magazine, 1 to 1 Magazine, Sales & Service Excellence Magazine and Customer Service Advantage. He is currently writing a book on building winning customer-service cultures entitled "C.L.I.C.K.! with your Guests."

Winemiller has been recognized among a select few executives in North America by 1 to 1 Magazine as a "Customer Champion." A graduate of Washington State University, he is an alumnus of the Disney Institute in Orlando, Florida. He received his professional certification in Customer Experience Management in 2010.

FAST FACTS

- 85% of consumers said they would pay 5% to 25% more to ensure a superior customer experience
- 85% of consumers wanted to warn others about the pitfalls of doing business with a company and 66% wanted to discourage others from buying from that company
- 82% of consumers have stopped doing business with a company as a result of a negative experience
- 76% of consumers say they appreciate it when brands and companies take a personal interest in them
- 66% of consumers said that great customer service was their primary driver for greater spending
- 55% of consumers cite great service, not product (49%) or price (42%), as their primary reason for recommending a company

Source: RightNow Customer Experience Impact Report – North America 2010

YOUR ORGANIZATION'S CULTURE IS YOUR ORGANIZATION'S PERSONALITY

- “Culture eats strategy for breakfast” – Peter Drucker
- We are in the people business first...
- Employees and customers live in parallel worlds
- A culture of trust is a culture of R.A.V.E.

WE CANNOT CONTROL THE PLAY ON THE FLOOR, BUT WE CAN CONTROL HOW WE TREAT OUR CUSTOMERS

- Create trusting customers – By trusting employees
- Less red tape – More red carpet
- A complaint is a gift – It is free consulting
- Business goes where it is invited – But stays where it is appreciated

CLICK! With Your Guests

- **C**ommunicate Courteously
- **L**isten to Learn
- **I**nitiate Immediately
- **C**reate Connections
- **K**now Your Stuff

CELINE FERGUSON

OK Ethics is pleased to welcome a member of the Coppermark Bank Compass Award Team. Honored in 2007 and again in 2011, the Selection Team was impressed with the exceptional level of service that Coppermark provided to its customers.

Celine Ferguson is the Senior Vice President and Chief Financial Officer of Coppermark Bank as well as the Assistant Treasurer of Coppermark Bancshares, Inc. Celine also serves on several committees in the bank including the Executive Management Committee for Information Technology and the Financial Management Committee.

Celine is a member of the Financial Managers Association and the Association for Financial Services. She was also selected as one of 12 representatives across the United States to serve on the board of a leading financial software company users group where she most recently served as their President. In addition, Celine is a past board member of Suited for Success, the Putnam City Public Schools Foundation, and a recent graduate of Leadership Oklahoma City. She is currently an Advisory Board Member for the Meinder's School of Business at Oklahoma City

University and volunteers for numerous organizations including the American Heart Association.

Some of Celine's honors include being named one of The Journal Records Woman of the Year "50 Making a Difference" for three years in a row and being recognized as Oklahoma City University's Distinguished Alumni for the Meinder's School of Business. This year Celine was also named by the Oklahoma Hospitality Club as one of their 2011 Ladies in the News as well as receiving the Community Hand Up Award from Suited for Success.

Understanding the importance mentoring has had in her life, Celine works hard to be a mentor to those around her. She has spent numerous hours mentoring to those in her organization as well as mentoring to accounting and finance majors at Oklahoma City University.

Celine has been married to her husband Brad for 25 years and together they have two children, Tyler who is twenty three, and Lauren who is eighteen.

Coppermark Bank Building Trust in Customer Relations

Mutual Trust and Respect

- Years to Build and Minutes to Destroy
 - Current Banking Climate
- Forthright Communication is Key
 - Transparency

- Can be Trusted with Confidential Information
- Is Honest in Dealing with Others
- Demonstrates High Ethical Standards

Begins at the Top

- Lead by Example
 - Honesty, Integrity and Trust
- Vision, Mission, and Values that Foster Ethical Behavior
 - One Thing to Write it, Another to Demonstrate it
- Three Simple Questions in Decision Making
 - Is it Legal and Within Regulatory Requirements?
 - Is it Ethical?
 - Is it the Right and Fair Thing to Do?
- Leadership Traits of Instilling Trust with Employees and Customers
 - Keep Promises

Ethical Challenges

- Future Reputation of the Banking Industry
- Technology
 - The Changing Way that Customers Conduct Business
- Social Media

Do the Right Thing

- Hire the right people for the right job, with the right level of experience, and expect them to do the very best job they can, in the most ethical way possible.
- Our Word is our Bond. As long as it's fair and legal, we will stand behind commitments and promises to our employees and customers.

Tim Hast

As a corporate trainer, Tim has conducted programs at companies such as Devon Energy, American Fidelity Assurance, the Oklahoma County Clerk's Office, Surexpress Freight and Courier Service, Vox Printing, Anautics, Inc. and many others.

As the son of missionaries, Tim lived in Puerto Rico throughout most of his formative years. Having experienced the cross-cultural dissonance between Caribbean and Oklahoma cultures firsthand, he has a unique insight into how the differences between individuals and their misunderstanding of each other can impact the quality of communication, and therefore relationships at all levels.

Tim holds a master's degree in education from the University of Oklahoma and a master's degree in Community Counseling from the University Of Central Oklahoma. In his work as a counselor focusing on couples in conflict, Tim observed that the majority of problems have to do with poor communication and conflict management. The same holds true in most relationships, both personal and professional.

Tim now provides training in the soft skills, including listening, communication, conflict management, and team building. He reflects that his work provides the oil that makes the machine of business run smoothly, minimizing unnecessary friction and maximizing productivity.

Building Trust In Customer Relationships – Tim Hast

Pine Tree Borers

- I. Systemic VS Topical Trust-Building
 - a. Treat the symptom: marketing, branding, and *appearing* trustworthy
 - b. Treat the system: internal customer service excellence taking good care of your employees.

Taming A Wild Cat

- II. Building Trust By
 - a. Care
 - b. Caution
 - c. Consistency

What Kind Of Glasses Are You Wearing?

- III. Be Aware Of Generational Preferences and Prejudices
 - a. Generational expectations
 - b. Generational preferences

Bibliography

Todor, John I. *Addicted Customers*. Martinez: Silverado Press, 2007.

Maslansky, Michael and others. *The Language Of Trust*. New York: Prentice Hall Press, 2010.

Bell, Arthur and Cohn, Richard. *Winning With Trust In Business*. Gretna: Pelican Publishing, 2008.