Case Studies

Name:
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Title:
Boosting Employee Morale

The Client:
One of the largest online banking institutions was struggling with employee morale and productivity. Their international call center had high rates of absenteeism and turnover, which impacted customer satisfaction. The company wasn't sure how to solve the problem, but they wanted help to increase retention and morale and, in turn, improve their customer service.

The Business Need:
The customer service representatives needed basic interpersonal skills training. I told their manager that once the employees understood themselves, they would be equipped to understand others, including their co-workers and their customers; in a customer service environment, it was especially important to teach the concepts of understanding others in order to adapt your listening approach.

The Solutions:
To help participants understand themselves and others, I introduced DiSC through QuikDiSC® and the *DiSC Classic*. We used the *Personal Listening Profile* to discuss the basics of customer service and to practice adapting to customers' needs. I also had the participants complete the *Team Dimensions Profile* to build rapport with their co-workers and to focus on the role of each team within the call center; the group was really a number of smaller teams focused on retaining customers or selling financial packages or handling ATMs, etc. We finished with a celebration piece and personal action plan. Everyone was given the DiSC *Talk! Action Planner* Cards to use as a job aid.

The Delivery:
I took a beta group of 20 people through the training in four half-day sessions — on Tuesday and Thursday for two weeks. On the first day of training, we did some needs assessment. I asked the participants to tell me what kind of problems they were facing in their call center. We came up with a list of 20 items, many of which were related to miscommunication or misunderstanding the other person. My goal was to work our way through that list of problems until everyone had a solution they could use if they encountered those situations again.

We moved into DiSC with the QuikDiSC game. Everyone was given four cards and then instructed to trade with others until they had four cards that best described themselves. After a short break, we de-briefed the game and discussed how to begin the process of better personal understanding. Next, I had participants complete *DiSC Classic*. I opened the floor for discussions and questions as I walked them through the various profile descriptions and how to recognize their internal customers as well as external ones. I gave everyone a pin to wear to identify their primary dimension: D, i, S, or C.

After we'd talked about their personal styles, we focused on style interaction. The participants worked through some of the descriptions of the different styles in different day-to-day situations (all of those descriptions are available in the PowerPoint® Presentation that comes with the DiSC Classic Facilitator's Kit). Each participant was asked to describe a difficult situation they'd experienced. The rest of the group tried to help the individual figure out how an understanding of personal styles would make the situation easier in the future. One employee shared that she once had an irate caller who wanted her to 'fix' his late charge; she felt that she had fully described the policy and done her job, but then her supervisor spoke to the person and 'fixed' the fee for the client. She felt betrayed by her supervisor and didn't want to deal with him in future interactions. As a group, we discussed each of the styles involved — the employee, the customer, and the supervisor — and the class suggested that in the future, the employee shouldn't 'argue' with the customer. Instead, she should transfer the call to her supervisor. This would relieve her stress since her supervisor had more authority to handle refunds. The woman agreed that this would be a practical solution. Each participant's story was unique, and the solutions we developed for each of the 20 situations will be useful to the entire group in future interactions.

On the second day of training, I brought in the *Personal Listening Profile*. The participants completed the profile and then we used several activities to reinforce their learning. I love to use the audiotape from the *Personal Listening Profile* Facilitator's Kit. I especially like the Sidewalk Café example from the tape; it helps participants connect with what they've learned about their own listening preferences and about how they adapt, or fail to adapt, to others.

When I introduce listening approaches, I always let the participants drive the direction of the course because it requires experiential learning — you can't expect them to read about their own preferences and learn new behaviors. Instead, participants reflect on interactions they've had with customers that didn't go well. The entire group discusses what went wrong in the interaction, and then they strategize how to adjust their listening approach in similar situations. This helps them tie what they've learned back to their work environment, adding practical application to the material. For this training, I also used another listening exercise, in which participants had to identify what listening approach the caller used by listening to call center employees handle situations. This exercise is outlined in the *Personal Listening Profile* Facilitator's Kit.

On the third day of training, we used the *Team Dimensions Profile* to focus on the subgroups within the call center. They split up by work groups — the retention team, the financial team, the ATM team, etc. — and we started with the LEGO® activity from the Facilitator's Kit. Each team has to build a tower, and it becomes evident if your team is balanced in terms of roles. I debriefed the exercise by discussing the different roles needed in every team effort. This was the jumping-off point for discussing the Z-process and the four roles. Next the participants completed the profile. As outlined in the Facilitator's Kit, and at the participants' request, we used another activity. I had them create team logos, mottos, and mission statements in their work groups. They had a ball! They wouldn't even take breaks. There were four teams and each came up with a group flipchart of their "Team Name and Motto" — two of the teams took their flipchart sheets back to their areas and hung them in their cubicles. They also let other members of their team know why it was hanging there since not everyone was in the class.

Again, I let the participants direct the session on the fourth day. They asked to revisit DiSC to make sure they understood style interaction. We began with a 25-minute overview of the DiSC model and the four dimensions, and the participants discussed how to incorporate DiSC with the Listening Approaches they'd learned, as well as with their team roles. It was a cross-training package. They also wanted to learn about the roles of the other work groups. We used role-plays for that purpose. The ATM group, for example, acted out some of their customer interactions while the financial group watched. Then the financial group could react and learn more about the ATM team's roles and responsibilities. It helped the call center's teams work together cross-functionally.

The Results:
The impact was immediate! The call center had their first full week in which no one called in sick

or left early, and the rest of the customer service employees were begging to come to class! After the first half-day of training, I had other employees from the call center stopping me on the elevator to find out when they could come. As a result of the training, one employee in my beta training group actually spent his lunch hour helping a customer — a first for him in terms of customer service! That improvement — that single employee — sold management on the training. The company had used a grant from the state to put the beta group of 20 through training, but now they've committed to putting all 200 call center employees through my training.