



# Case Studies

**Name:**

Sue Beyer

**Title:**

Turning Complicated Programs into Simple Truths

**The Results:**

Organizations often seek improvements to their culture that are easy to comprehend: better communication, enhanced leadership skills, and so on. But as all trainers know, these straightforward concepts are not necessarily a snap to implement. In fact, intricate programs and complex thinking are often needed to explain these so-called simple ideas to participants.

Veteran trainer Sue Beyer often designs multilevel programs to educate participants on these important subjects. She also may use more than one product to address deep-seeded organizational problems from different angles. This willingness to embrace complexity came in handy when a customer service call center asked her to help them improve their efficiency.

The call center's environment was one of high stress and stagnant innovation. Lackluster effort was common, and the workers' gaps in technical knowledge were obvious. Beyer's analysis was that the employees had inferior telephone skills and needed help developing their communication abilities.

"They were poor listeners," Beyer says. "They did not ask callers good questions, and they were unable to identify the callers' real needs."

Beyer believed that there were several reasons for the workers' problems. They had no understanding of their own behavioral patterns, and their colleagues' styles were even more of a mystery. In addition, knowledge often was not communicated to the workers, which Beyer says was a result of the managers avoiding their responsibilities.

"The supervisors were not supervising," Beyer says. "They didn't know how to coach their people."

Before leaping into possible solutions, however, Beyer wanted to make sure that she knew as much as possible about the call center and its environment. So she interviewed both employees and managers to find out what issues they faced. She also listened in on actual calls to the center and taped several of them for transcription. Beyer says such thorough needs analysis was necessary before designing a training program.

"We learned that the employees and managers needed to relate to one another more effectively," Beyer says. "But we also learned that everybody needed to understand the customer better."

Now that she had a solid idea of the challenges that the organization faced, Beyer customized her training. She wanted to start by increasing the participants' knowledge of themselves. Beyer believed that if this step were successful, she could then move on to showing the workers how and when to adapt their styles.

From the start, *DiSC® Classic* was the foundation of her solution. However, Beyer also used *DiSC PPSS* and the *Personal Listening Profile®* to supplement the participants' learning process.

So in Phase One of her training, Beyer administered all three profiles to the participants. She then



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led a discussion of the instruments' results, which allowed the employees to learn more about their own behaviors and motivations.

"They identified their personal strengths and weaknesses," Beyer says. "That got their attention."

To move the discussion beyond the abstract, Beyer applied the participants' insights to the transcriptions of the recorded customer calls. Beyer removed any reference to specific workers so that none of the participants would be embarrassed. Then the employees took turns role-playing the actual phone conversations. The result was a dramatic display of the pitfalls of personal interaction.

"They saw the mistakes and assumptions that their colleagues were making with customers," Beyer says. "And in some cases, they saw the mistakes they were making, but from a new perspective."

The role-playing exercise continued into Phase Two of the training. The DiSC model was a constant reference point, and the participants began to see the connections between style and effective communication. Beyer also used this time to introduce online action planners and helpful listening activities. As she did previously, Beyer did not plan the next phase until she gauged the participants' progress.

"I design each section based on what happened in the earlier phase," Beyer says.

Phase Three included the administration of the *Time Mastery Profile*®. The participants learned about prioritization and proper time management, and the lessons of the first two phases and their respective instruments were reinforced throughout the section. At this point, Beyer had the participants role play the transcriptions one more time, taking care to apply the insights of all the various profiles to the real-world examples.

With the formal group sessions ending, Beyer segued to one-on-one coaching to ensure that the participants' new skills took hold. She also helped the workers create action plans, which were solidified with the help of a "buddy system" of colleagues.

"The goal is to make skills turn into habits," Beyer says. "They have to have time to work on the lessons of the training."

Those lessons included identifying possible causes for miscommunication. Participants saw how earlier interactions with colleagues or customers had gone wrong, and they tried to learn from these errors by recognizing how behavioral styles and perception play a vital role. The workers also learned how to improve the speed and effectiveness of their interactions with customers, and some even applied their insights outside of work.

"It's more meaningful for them, and it helps develop the new habit, if they can take what they've learned and use it in their personal life," Beyer says.

Measuring the ultimate success of training is a difficult task. Many consultants and trainers must rely on anecdotal evidence to show a job well done. But while Beyer received no shortage of positive feedback, she also had concrete evidence of improvement.

The call center increased its scores on a 25-item list of customer service standards. Key metrics also rose, including the professionalism rating, which surged to 97%.



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Beyer says that the organization's goal of hitting the benchmarks of good service was met. She adds that the complexity of her solution did not overwhelm the participants, and in fact, it helped them learn the simple truths of interpersonal communication.

"Training is about asking people to modify their behavior, so they first have to understand their behavior, and that is why I always start with DiSC," Beyer says. "Then, depending on the need, I use the other tools Inscape offers."