

# Case Study

## Using Inscape Publishing Products to Develop Communication Skills at an Insurance Company

- *DiSC® Classic*
- *DiSC PPSS*
- *Team Dimensions Profile*

Some managers had been at the insurance company for 30 years. Others had a mere decade or so under their belts. Regardless of their tenure, however, most of them believed that their years working together had forged the management team into a smoothly running machine that operated at peak efficiency.

But Paula Switzer, of the Switzer Resource Group, was not convinced. When the insurance company asked her to help improve the managers' communication skills, Switzer looked at them and saw people stuck in a rut of their own making.

"Most of the managers had been there for a long time," Switzer says. "There wasn't a lot of fresh thinking."

Switzer set to work uncovering the organizational difficulties that the years had coated with a thin layer of denial. She sent a questionnaire to all the potential participants in her training so she could collect background information and opinions. In addition, she interviewed several managers for in-depth data gathering. The surveys and interviews revealed myriad issues.

The more obvious problems included the high rate of employee turnover, which was in direct contrast to the longevity of the managers, and the large number of employee complaints about heavy stress. Switzer dug deeper to find such issues as poor execution of plans, an inability to implement innovation, and a high percentage of non-engaged employees. Most important, Switzer identified the working environment as seriously flawed.

"People were walking on eggshells," Switzer says. "They just weren't comfortable disagreeing with one another."

Multiple problems usually have multiple underlying causes, and this was no exception. Switzer believed that a chief reason for all the difficulties was the lack of knowledge that the managers had about their own behavioral styles. They knew even less about their colleagues' styles, and they had made no real effort to get to know one another. The lack of team balance and clear goals also complicated the working situation, as did the staff's collective fear of change.

However, the biggest root causes involved poorly defined assignments, responsibilities, and deadlines. The company simply had not undertaken an honest assessment of team effectiveness.

"There were no regular interactions among the managers, other than quick status updates," Switzer says. "They had different behavioral roles and even different agendas."

To design an effective solution, Switzer had to create a program that was nonthreatening yet still loaded with insights. She also knew that she had to convince the long-term managers, all of whom would be in the training, that new skills and ideas were relevant to them.

Switzer decided that the best way to reach the participants was to develop a flexible and interactive program. This meant designing each session only after the completion of the previous round. Such creativity and quick thinking is a hallmark of Switzer's training.

"I have a sense of where I want to go, but I leave my options open about how I get there," Switzer says. "Building it as you go can result in a program that is dynamic and responsive to the participants."

# Case Study

As pre-work to her formal training, Switzer had the participants take *DiSC® PPSS*. She then transferred the results to *DiSC Classic*, which allowed her to discuss both instruments with the managers in the first session. After Switzer introduced the DiSC model to the participants, she led the conversation about the importance of behavioral styles. The participants talked about their individual differences, and they were open to a unique assignment that Switzer gave them to complete before the next session.

“I told them to identify someone in the training they wanted to improve their relationship with,” Switzer says. “Then they were to go to lunch with this person and discuss their respective PPSS reports. I wanted them to see what they needed from each other to work effectively.”

The other project that Switzer assigned to the managers was to complete the *Team Dimensions Profile*. At the following session, Switzer went over the profile, taught the participants about the Z-Process, and discussed the importance of role differences. Although the explanation of the theory was powerful, Switzer wanted to give the participants a real-world application of the profile.

So she divided the participants into smaller groups and pulled out the questionnaire results from her needs analysis. She then asked the managers to use the Z-Process to develop action plans to address the issues that the survey had revealed. The participants dove into the project, which both reinforced their new skills and created potential solutions to problems that had been vexing the organization.

For the final session, Switzer reviewed the DiSC model and the Z-Process one more time. She wanted to verify that the participants took the insights to heart, but she also wanted to ensure that they did not view the instruments as contradictory.

“I told them that two Perfectionists can have different roles in the Z-Process and it’s ok,” Switzer says. “I said, ‘This is just another level of you,’ ”

When the formal sessions ended, Switzer learned just how successful her flexible approach had been. At that point, the managers engaged her in an informal discussion about their additional concerns. Switzer realized that trust in her had been established, and the participants wanted to learn even more. She says the experience proves the importance of ongoing adaptability and openness.

“By creating each stage of the program only after I had learned their needs, I was better able to address their issues,” Switzer says.

Those issues were not so intimidating to the participants once they learned a common language with which to discuss them. Switzer says that the managers better understood the potential causes of their previous miscommunications, and they embraced strategies for dealing with different behavioral styles.

“They know how to deal with a high D now,” Switzer says. “And they know that negative reactions might not be personal attacks.”

The participants also identified their strengths and weaknesses, as well as the behavioral preferences of their colleagues. As a result, communication among the management team increased.

“They understand each other a heck of a lot better now,” Switzer says. “Learning each other’s style was very beneficial.”

Another positive development was the participants’ enthusiasm for the Z-Process. Switzer says the managers made sincere efforts to balance their teams. They also became less hesitant to adapt to an unfamiliar role on occasion.

# Case Study

“They realized that even if they are not Advancers, they are going to have to step up in certain circumstances and just advance,” Switzer says. “They know that they can’t ignore that part of the process.”

Switzer says the management team has developed action plans to handle key issues that her needs analysis uncovered. She adds that the managers are revitalized to work together again, even after all their years of collaboration.

“They had been working together for some time,” Switzer says. “But they’ve learned that it’s never too late to learn new skills.”