

ASTD 2008 Learning Transfer Contest

First-Place Winner: Suma Elwell
The WRC Group of Companies, USA

LEARNING: What key learning from the 2008 ASTD International Conference did you apply back on the job? *Please include the source of this learning (workshops, sessions, certificate programs, peers, etc.)*

I applied the Five Dysfunctions of a Team model using notes from the keynote session by Patrick Lencioni and the session on Practical Applications of the Five Dysfunctions of a Team Model. The contents of these sessions was applied to our Underwriting department that was then struggling with issues of accountability, destructive conflict, low morale and overall lack of team work. Using the materials from ASTD ICE sessions mentioned above and the field service guide to the 5 dysfunctions model, I designed the Strategic Development Program (SDP). The SDP was conducted twice a month for 3 months and the session length was 2 hours. Below are the highlights of my email to Patrick Lencioni describing my journey and success applying the model: I was introduced to the Five Dysfunctions model at your ASTD ICE keynote session. I remember meeting you at the book signing and expressing my concern about our Senior Leaders buying into this topic. A couple of months after I got back from ICE, I managed to convince the CEO of our sister concern to try this model as all the departments in her company was in a state of disarray. I was finally able to set out on my journey to implement the five dysfunctions model within our underwriting department. Instead of doing the entire session in 2 days, I spread the sessions over three months. In the beginning everyone was skeptical about the session as they had attended other team building sessions that hadn't worked for them. But as we progressed with the subsequent sessions, the employees started to see how it was helping them and they really started to get more and more involved in the process. For the first time since the dysfunctions session the team met today for their department meeting that went well and everyone reported about how good they felt about their department. The success story of this department has got other department heads interested in this program also. I will start my work with the next department in January 2009.

ACTION: (40%) How did you put this learning into action in your organization or with your clients? What challenges did you overcome?

The underwriting department within our sister concern 1st Auto & Casualty was the first to try out this program. The VP of Operations had mentioned to me previously of how this department was struggling with team issues such as low accountability, low morale, & negative communication. My first task was to convince the CEO of 1st Auto & Casualty on how the 5 dysfunctions model can help resolve the issues within the Underwriting Department. After getting her approval for the program, I had all members of the department including the VP of Operations and the CEO of 1st Auto & Casualty take the Team Assessment. It came as no surprise to me that the Team scored low on all five dysfunctions indicating that there was a problem with Trust, Conflict, Accountability, Commitment & Results. All members of the UW department were notified by a memo from the CEO that they were going to attend a six week Strategic Development program to help improve their productivity and team skills. The first session was on Trust and my biggest challenge was conducting the Personal Histories Exercise. I was not sure how the members would respond to this activity. Much to my surprise they all were willing share their stories and at the end of the exercise they felt that knowing what they did of their co-workers personal histories provided a human touch. This was just the beginning of my indomitable task. In the next session the participants took the Disc assessment which helped them understand their co-workers better. I think the most time was spent on the conflict session which actually took 3 sessions and at the end the members had established a conflict norm that is applied in their daily communication. The last couple of session was setting the thematic goals which the department will re-visit end of February to review their success. Today all members certainly feel more satisfied with their work processes which was revised in these sessions and also working with their fellow employees.

RESULTS: (40%) How has your application of learning made a difference to the organization, the business, or your offerings? *Please support your answers with available metrics or other criteria that clearly show the impact.*

During the Strategic Development program the participants expressed that they had no idea what their co-workers did. Although they worked in the same department they had no knowledge of what other did and this also contributed to the feeling that some people worked harder than other. There was also the issue of couple of employees who were constantly absent on a Monday when the work load for the underwriters and the CSR's (Customer Service Rep's) was the most. To address this issue the department members re-visited their workflow and found there were many redundant steps. They revised the work process and also made sure that they formulated a back up plan to accommodate for the days when other employees were absent. In doing so the department increased their rate of new business submission from 39 per week to 79 per week. The endorsements and inquiries increased from 641 to 782. As for the employees who were constantly absent they addressed this

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issue in the accountability session. In doing so, it helped lower the frequency at which these employees took off for personal reasons. These employees have stated to me that now when they need to take a day off because one of their family members is not well (which is most often the case they don't come to work) they try to find someone else to stay with their sick family member and reduce their number of days they miss work. Another employee showed up to the Christmas bowling party even though that morning she had lost the custody of her son as she felt she did not want to let her team down by not showing up. Before the SDP sessions the employees disliked going to the department meeting as they felt there was a huge rift between the CSR's and the underwriters. Today the CSR's and underwriters work together more cordially and 3 underwriters were promoted and given responsibilities of overseeing the CSR's. Overall the members communicate to one another in a more positive tone and are very willing to help each other.

SUPPORT: (20%) What factors helped you the most to put your learning into action? Who were your supporters and champions?

Firstly, having a proven model like the 5 dysfunctions was really helpful. It was simple to use and the field service guide gave you the list of exercises for each session. This helped reduce my research time for this program. Secondly, it was helpful to talk to the CEO of another Insurance company in Madison on how they applied it and what was their outcome. Thirdly, it was a great boost that the CEO of 1st Auto and Casualty was really supportive of this program. She sat in on all the sessions and was always willing to go first to share her experiences. When we did the personal histories exercise the first session, she was the first one to share her story. This helped other employees attending these sessions open up. The major success of this program came when I got the support of all participants attending the program. After the first session I still had a few skeptical participants who had been to other team sessions that had not worked for them. But as the sessions progressed they started trusting the success of this program and were the key champions in spreading their success stories across other departments. Towards the end of the program the success stories dominated the conversation in break rooms and fitness rooms. I still have skeptical employees out there who are nervous to try this program out. I am confident that they will buy into it after the first couple of sessions. I am starting the next SDP for another department tomorrow. I am really enthusiastic about this and am looking forward to sharing my success stories in months to come. I am also excited about the underwriting department's thematic goals meeting next month when they will measure the success of their thematic goal set at the end of the SDP session and chart new thematic goals for the future. The success from this program was so great that it was one of the main topics discussed at our All Employee Meeting in November. Team building can only be accomplished when the team buys into the program.