

## Connecting an Organization with *Everything DiSC*<sup>®</sup>

### Company

- A medical diagnostic center and research organization with companies spanning across the U.S.
- The finance and accounting department, that works with all areas of all companies.
- Approximately 30 employees in the finance and accounting department.

### Products Used

- *Everything DiSC*<sup>®</sup> *Management*
- *Everything DiSC*<sup>®</sup> *Workplace*
- *Everything DiSC*<sup>®</sup> *Comparison Reports*
- *Everything DiSC*<sup>®</sup> *Group Culture Reports*
- *Personal Listening Profile*<sup>®</sup>

### Challenge

When the new CFO arrived, he sensed people were disconnected from one another. After being in the organization for a few months, he found that basic communication and customer service skills were lacking, interdepartmental relationships were in jeopardy, outside customers complained regularly, business-close was taking too long, and there was no synergy between team members.

The CFO wanted to do customer-service and change-management programs for the finance and accounting group.

### Solution

We created five lunch-and-learns around the *Personal Listening Profile*. Most employees and managers were engaged and began to buy in to their self-development.

After the lunch-and-learn sessions were over, we were asked to coach a few of the new managers. We used the *Everything DiSC Management Profile*, a workbook we created, and the *Everything DiSC Management* video to individually coach each manager. As part of the management-coaching process, we used the *Everything DiSC Comparison Reports*. We ran comparison reports between the CFO and the managers, and by request, any two managers who wanted one.

We had facilitated coaching sessions with the controller and two managers who were his direct reports. The controller's managers gave him feedback about his management style. At one point, the controller was resistant to the feedback he was given. The high-C manager who gave him the feedback was able to provide the controller with an example of when his management style doesn't work well for their relationship. She told him that when she works very hard to gather and bring him correct data, he often makes her feel like he doesn't trust her numbers or ideas for solving problems with the data.

The individual coaching sessions were so successful, that the CFO wanted more training. Together, we designed a program that included two sessions for managers, two sessions for employees, and a final session on conflict management for the entire group.

We started with the managers and opened with reviewing the *Everything DiSC Management Profile*. Next, we went over the *Everything DiSC Group Culture Report* and had a great discussion about what their culture looked like and how it might impact the organization. At the

end of the session, we gave the managers random *Everything DiSC Comparison Reports* and gave them the assignment of pairing up with their *Comparison Report* partner. They reviewed their *Comparison Reports* together and talked about the information and how it could help their working relationship.

After the management session, we began two employee sessions, following the same format we used with the managers. For the employee group, we used the *Everything DiSC Workplace Profile* along with the *Group Culture Report* and random *Comparison Reports*.

Finally, we ran *Comparison Reports* between each manager and each of their team members to use to improve their working relationship.

### **Coaching Results**

- One manager, who has a high D/I style, was rubbing everyone the wrong way. As we discussed this in our coaching session, she began to cry and said, “I’m a D, I tell them they can come in and tell me what’s on their mind.” She thought that people would then come to her directly if they felt something was wrong.

We gave her some candid feedback about how her words sent a message, but her behavior told a different story. The next day, she had an epiphany and realized how much her behavior was impacting not just her team, but others too. Since then she has made a great effort to accommodate people based on their styles. One of her team members, who was close to being put on a performance plan, is now her “superstar.” By communicating differently, she is getting much more out of people.

- During another session, a manager who many employees were having problems with, openly stated he realized he was causing conflict by not being aware of how his high-D behavior was affecting others. One of his direct reports was ready to quit; this manager told her that he now realized he needed to communicate differently with her and would make an effort to do so.

### **Other Results**

- When the CFO came on board, business-close took approximately 21 days. It is currently about 5 days.
- The finance and accounting department have had happy hours and events outside of work.

## Re-energizing Management Skills with *Everything DiSC*<sup>®</sup>

### Company

- Non-profit company with 500 employees

### Products Used

- *Everything DiSC*<sup>®</sup> *Management*
- *Everything DiSC Comparison Report*

### Challenge

- The leadership team had communication gaps, interpersonal difficulties, and trust issues.

### Solution

The first intervention focused on the leadership team. In order to understand the breadth of the problem, the entire leadership team gathered in one room and discussed the challenges they were facing. Over the next months, I followed up with each individual.

The Chief Operating Officer was primarily responsible for all of the leadership team members. After our session, he said that he felt like he needed to go back to school to learn how to manage people. I suggested that in lieu of going back to school, he take the *Everything DiSC Management* assessment.

He took the assessment and loved the results so much that he brought it to the HR department and told them he thought the whole organization should go through it. The HR department pushed back, because they had already put the entire organization through Predictive Index<sup>®</sup>. However, the COO was determined to bring the leadership team through the profile, and showed the HR team how simple and intuitive it was. He thought that the rest of the organization would appreciate how much easier DiSC<sup>®</sup> was to understand, and he was successful in his pursuit.

The leadership team went through two four-hour sessions, using two modules from *Everything DiSC Management*. During those sessions, we also discussed trust, relationships, and group-forming stages (forming, norming, storming, performing and adjourning), which helped them to be more comfortable and to see the benefits of opening up when discussing DiSC.

### Results

After the sessions, I created *Everything DiSC Comparison Reports* for the leadership team. Their feedback was that the *Comparison Reports* were not only right on, they were very invaluable in really understanding the individual relationships they had with each other. They are continuing to use the reports on their own to improve their communications and relationships.

After working with the leadership team, the executive who supervises the mid-level managers decided that he wanted to bring *Everything DiSC Management* to all of the mid-level managers. Currently, we are in the process of administering the profile to the mid-level managers.

They have indicated a great deal of improvement in their functioning together since we started our process 15 months ago. In fact, they are so committed to the learning process with the *Everything DiSC family* of products, they opened their own EPIC account, and they love that they don't have to pay an annual fee to use the account and they can pay as they go. EPIC has allowed them to keep their learning alive and to respond to both immediate and long-term needs.

## Enriching Sales Training using DiSC<sup>®</sup> and *Everything DiSC*<sup>®</sup>

### Company

- Privately-owned supplier of specialty chemicals to the oil and gas industry
- Division of a U.S.-based parent company with locations across Canada
- Over 2,000 employees worldwide

### Products Used

- *DiSC*<sup>®</sup> PPSS with sales supplemental reports
- *Everything DiSC*<sup>®</sup> Sales
- *Everything DiSC Customer Interaction Maps*

### Challenge

The company had been providing basic sales training to sales staff for 10 years with some noted success. The problem was in creating examples of sales situations that their people could relate to.

### Solution

In 2005, sales training was revised to include DiSC. At first, we used the *DiSC PPSS* with the sales supplemental reports, and the response was positive. When *Everything DiSC Sales* was released in 2008, we finally had access to a sales-specific DiSC program—and it had video with real-life sales scenarios! We decided to give it a try. We used *Everything DiSC Sales* as part of our three-day sales training program. Since we switched from *DiSC PPSS* to *Everything DiSC Sales*, the positive feedback from staff has been even stronger.

### Results

Out of everything covered in the three-day sales training program, the feedback on *Everything DiSC Sales* is always the strongest. Participants recognize it as something they can apply right away, both with their customers and their co-workers. The video is always a big hit; people see themselves and past mistakes they've made by not adapting their behaviors. The free follow-up reports, *Everything DiSC Customer Interaction Maps*, have also been well received. We continue to look for new ways to encourage salespeople to use these free maps on an ongoing basis. We've focused on making sure area managers see the value of the *Everything DiSC Customer Interaction Maps* so they will influence their sales team to use them.

My client has long known that selling is all about relationships: understanding the customer's priorities and communicating in a way that fits the customer's needs. *Everything DiSC Sales* has given them a way to recognize others' behavior and adapt their sales pitch to fit that customer. One salesperson commented, "I have been using DiSC to read my customers and adapt to their style of doing business. My customers and I seem to feel more comfortable during our meetings."

My client's sales team has found the training useful when dealing with coworkers. "My coworker and I realized that DiSC helps us work through issues easier because we understand where the other is coming from. We have 'sold' each other on ideas and opinions much more effectively due to what we learned from the course!"

Ultimately, though, in sales it's always about the bottom line. As one recent participant commented, "Using DiSC to people-read my customer is not only enjoyable, but profitable."

### Using *Everything DiSC*® Sales in a Financial Services Company

Jim Weaver, a trainer with a financial services company recently took part in a train-the-trainer session featuring *Everything DiSC*® Sales.

Weaver said that the training helped salespeople understand why they've had difficulties with customers in the past and that the difficulties are seldom the result of chance. He says that DiSC® gets salespeople to see that different communication styles exist, and that those differences can be the difference between success and failure. He added that this insight is often a surprise to veteran salespeople.

"They say to themselves, 'Now why didn't I make that sale?' Then they find out about DiSC, and they say, 'OK, I see it now,' " Weaver remarked.

According to Weaver, the *Everything DiSC Sales* video helped illustrate the differences in styles. By showing the consequences of failing to meet the customer's priorities, the video illustrates how even minor differences in communication approaches can have negative effects. He says that the scenarios on the video help salespeople apply DiSC to their real-life experiences.

"A lot of salespeople related to the situations in the video," Weaver said. "It directly linked their styles to the challenges they face in the field."

Weaver says that in addition to helping salespeople see what they may have done incorrectly in the past, *Everything DiSC Sales* allows participants to discover how they can improve their communication with customers in the future. He believes that by helping people discover their unique strengths and limitations, *Everything DiSC Sales* can convince even experienced salespeople that they can become more effective at their jobs.

"It's an entertaining way to explain the problems they've faced in the past," Weaver says. "And it also helps them make improvements to become better salespeople."