



Inspiring Learning

## Case Studies

Change Management (Certificate Programme)  
Change Management in Action at Howard Cottage Housing  
Communication at AWE  
Creative Thinking at the Electoral Commission  
Culture Change at High Peak Housing  
Customer Care at Peerless Housing  
Customer Care Culture at Willow Park Housing Trust  
Embracing Change at North Wiltshire District Council  
Employee Engagement at Staffordshire County Council  
Equality and Disability Awareness at Lee Housing Association  
Equality and Diversity at IDIS  
Internal Consultancy at HBS  
Leading Change at Sentinel Housing Association  
Leadership Development / Service Improvement  
at Kirklees Metropolitan Council  
Management Development at Adactus Housing Group  
Resident Involvement at Accent Peerless

# CASE STUDY – CHANGE MANAGEMENT

## *A flexible and integrated approach to change training*

**How do you obtain the tools, skills and knowledge to manage change when you perform a specialist role for which there is no standard training? And how can you ensure support and guidance during your development when you work in isolation or already have more knowledge than most of your colleagues?**

This is the situation that faces many change agents within organisations, whether project managers working in operational teams or line managers trying to implement change alongside their day to day duties.

Whilst change management is often touched upon as part of management development programmes or covered in short courses, Pearlcatchers felt that there was a lack of in-depth learning and support available to those expected to manage the implementation and impact of change in their organisations.

*So they created the Certificate in Organisational Change – a flexible and integrated development opportunity, which pulls together the three core attributes needed by effective change management professionals:*

- **Knowledge** to understand the drivers and process of change
- Familiarity with the **tools** available to support change
- **Skills** necessary to apply the tools/knowledge successfully

Pearlcatchers' Sharon Young explains "Our initial market research revealed that while there is an abundance of training available in this field, most courses deal with only one or at most two of these attributes. Obviously, knowledge of the key issues and an understanding of relevant tools are important, but to be truly effective a potential change manager needs to possess the right skills to apply them correctly. This is the basis from which we designed the Certificate in Organisational Change - to provide a holistic and integrated development opportunity."

In addition to learning around the core competencies, the programme also provides a framework for support that can be missing for many specialists working in isolation or small teams. The format of core modules and learning sets every other month, provided delegates with the opportunity to gain knowledge and support from like-minded individuals.

The pilot programme began in late 2003 with delegates from both the private and public sector, including Sainsbury's, London and Quadrant Housing Trust and The Department for Work and Pensions. The flexible nature of the programme meant that it was equally attractive to delegates in varying roles within organisations – from project leaders to senior managers. One delegate explains why she chose this programme:

*"I was looking for a training course which would give me a better understanding of what change is all about. I wanted a course that would link in a very practical way to the work I was doing and give me the tools and knowledge to lead and manage change more effectively in my role. The Certificate programme fitted this bill perfectly"*

# CASE STUDY – CHANGE MANAGEMENT

The programme (which is designed to run over twelve months) was split into several key activities. The first stage of the programme was to complete a **Skills Assessment** (a combination of questionnaires, 360 degree feedback and status reports) that was used to identify key learning priorities. A feedback report was produced and a meeting held with each delegate to help prepare their Personal Development Plan (PDP)

*“I found the Skills Assessment very revealing, helping me to focus on aspects of my personal style that I may not have been aware of. I have been able to put together a personal development plan based on these insights”.*

**Core Modules** – interactive two-day modules held every other month which took delegates through the Cycle of Change – Pearlcatchers’ model for effective change management. Each module was followed by a work-based project to help delegates take their learning back into the workplace

*“These modules gave me a basic grounding for tackling change issues, helped me think both more strategically and practically about change and provided the tools to help me do so. In many cases, topics were directly relevant to projects I was working on - I have already been able to use some of the tools to great effect”*

The bi-monthly modules also incorporated **Learning Set** meetings – as well as providing a format for regularly reviewing progress, the Learning Set also offered some of the support and feedback that these specialists were lacking within their own organisations.

*“The Learning Set gave me an invaluable opportunity to learn from others’ experience, especially those working in different sectors”*

**Development Days** – there were also a range of one day modules which focussed mainly on the skills aspect, such as influencing, facilitation etc and delegates chose which ones were most relevant to their own specific development needs.

*“We did a very revealing exercise as a group which got us to look at personal values and really work on influencing from the personal standpoint – this has undoubtedly helped me a great deal in developing a range of influencing styles”*

The programme was rounded off by a repeat Skills Assessment to identify progress and a final Learning Set meeting to help develop future learning plans. All the delegates have made significant progress against their learning objectives with several obtaining new jobs or promotions as a direct result of their development on the programme.

*“I would wholeheartedly recommend the course to others. I was able to learn at a pace that suited me without too much heavy academic study. Each piece of coursework could be linked directly to my experience at work and therefore benefited both my developmental needs and met my company’s objectives too. The self motivated learning group was I felt very supportive and enabled me to get a different perspective on issues relating to my company and its culture, as well as my own management style.”*

*“For me this has been an extremely rewarding experience that has helped to broaden my horizons and be more effective in managing change. Without it I may not have sought out the opportunities that have resulted in positive change both in my work and personal life”*

# CHANGE MANAGEMENT IN ACTION

*Howard Cottage Housing Association were moving to new custom-built offices and wanted to use this as an opportunity to make some changes to the organisation. The expression ‘take what is good and leave behind what is not’ was used in our initial discussions. The programme was designed over five phased modules that were aligning with the various stages of the change itself. Alongside the formal modules, we offered remote support to the management team via email / telephone to discuss any specific issues they were experiencing as individuals.*

## **Module 1 - Recognising the Opportunity/Creating Culture**

In the first module, we explored the fundamentals of change in today's business environment and introduced delegates to the Cycle of Change – our model for implementing successful change. We also took the management team through Phase 1 of the Cycle of Change, incorporating understanding internal and external climate and opportunities; designing /understanding a vision and defining the change/desired outcome. This involved environmental scanning to understand the external climate, culture assessment to identify the internal climate and the identification of key opportunities and threats. They also created their own ‘big picture vision of the future’ and designed their desired culture for the organisation moving forward. Between the first and second module, the management team carried out a number of activities, including identifying what they needed to stop, start, continue or change to move to the new culture.

## **Module 2 – Planning for and Leading Change**

In module 2 we focussed very much on the skills of leading change and how to plan the change effectively. This module will take delegates through Phases 2 (Building Support for Change) and 3 (Planning for Change) of the Cycle of Change. Phase 2 looks at defining the approach to change, building the case for change, identifying key players and winning stakeholder approval and commitment. Phase 3 looks at assessing the impact of change, building readiness for change, building a project plan and planning for motivation / communication.

The final key element of this module was around leading change and the premise that to achieve great heights people need inspirational leaders to model the way. This involved exploring the five aspects of Kouzes and Posner's Leadership Challenge (Challenging the process; Inspiring a vision; Enabling others to act; Modelling the way; and Encouraging the heart). Delegates completed self assessments and then looked at the strengths and development needs of the leadership team as a whole. After the event, the management team then worked on a vision / communication for employees and a detailed project plan.

## **Module 3 – Managing People through Change**

In module 3 we looked at managing employees through change (and dealing with This module is much more of a skills-based day, focussing on the skills and tools needed to help people manage their transitions to the new ways of working. As such it incorporated the first two stages of Phase 4 – Communicating Change and Managing People through Change. The role of the manager is crucial in helping people to recognise the positive benefits of change, supporting and motivating them through the hard times, recognising and dealing with resistance and keeping the momentum going.

# CASE STUDY – CHANGE MANAGEMENT IN ACTION

To do this, managers must first recognise their own reactions to change and then adopt a range of techniques for communication, influencing, motivation and understanding to support their teams through the process of change. We covered all these aspects on the day, using our professional actors to bring scenarios to life and to facilitate individual role plays. Following the event each manager took some time to consider their team members, their potential reactions and come up with a plan to help them manage their personal transitions. In addition, the team worked with their board to refine the launch presentation to all staff

## **Module 4 – Refresher and Skills Development**

Between modules 3 and 4 the formal staff launch and project plan was slightly delayed due to a delay in the building work and two new members joined the management team to cover a maternity leave. We took this opportunity to do a stock take on progress, successes and issues to date and to work on some skills that were felt to be holding the management team back from progressing more quickly / effectively.

We started off with a review of the programme to date, which also served as a way of getting the new team members up to speed. All the managers then went through their vision presentation and were given individual feedback and tips, together with some ‘advanced presentation skills’ techniques. We then reminded everyone of the ‘fatal errors’ of change programmes, their key role as leaders and then spent the afternoon working on how they could ‘make time for change’. This involved a session on time and stress management techniques which led to a planning session for them as both individuals and a team.

## **Module 5 - Embedding and Reviewing Change / Living the New Culture**

Between Modules 4 and 5, the move took place and the various procedural / behavioural changes were announced / implemented. The module therefore focussed on Phase 5 Embedding and Reviewing Change (Link into core systems; formal review and closure; ensure ongoing support and link review to continuous improvement). We effectively reviewed the success of the change project, reviewed their desired culture and went back through some of the ‘recognising the opportunity’ activities from module 1 (but with input from the new team members). This identified major successes, outstanding actions / issues and new areas for focus in the future.

We are continuing to work with Howard Cottage on areas such as executive coaching and rolling out a new appraisal system to all staff and managers, which includes behavioural competencies as well as objective setting / review. Feedback from the programme includes:

*“A really good, comprehensive programme- the fact that it was all about us and not some ‘off the peg’ product, means that it has delivered much more than expected by allowing the growth of the association through the leadership team”*

*“Sharon is very perceptive – giving good advice and eliciting required responses. She understood the housing industry and had practical knowledge of change programmes”*

*“The programme has helped us to deliver huge organisational changes and to improve the way we work as individuals and a leadership team”*

# CASE STUDY - COMMUNICATION

## *Singing from the same hymn sheet*

***How do you maintain staff confidence and commitment in changing times when you have a diverse workforce ranging from top scientists to industrial, administrative and IT staff? That was the problem facing management at a major government scientific establishment.***

Historically, their Corporate Communications department tended to focus on external relations. But the organisation's senior management team recognised that to win staff support for change, internal communications needed to be strengthened. In September 2003, a new Internal Communications team was created from existing employees with strong backgrounds in marketing / publishing and a good understanding of the business, but with no formal training on internal communications

That is where Pearlcatchers came in. At an exploratory meeting, it became clear that the team were well informed on the issues relating to internal communications within the organisation. However, they felt that they needed to develop their expertise, influence and confidence in order to successfully move the department and the company forward.

To minimise disruption to the office, Pearlcatchers designed a training programme, the first phase of which comprised five half-day modules. As a new team, influencing skills were essential to assist them in establishing their credibility and carving out a recognised role within the organisation, so the first two modules centred on understanding and developing influencing skills.

The team were given pre-course questionnaire, which included self assessment on various influencing skills/situations. The first module concentrated on recognising and practising different influencing styles the role of beliefs and self esteem and developing sources of personal power. The second module focussed on specific influencing scenarios that were likely to face the team, such as influencing without authority, making an impact at meetings and gauging your audience.

The third module considered the tools and techniques you need for effective internal communications – such as stakeholder management, using informal communication structures - and examined case studies from other organisations. The day culminated in the initiation of a case study of their own organisation. Then came how to develop, implement and review an internal communications strategy. This needed to involve all the members of the Corporate Communications department. Traditionally each member had tended to focus on their own specialism, - working in silos – without necessarily recognising the implications for internal communications.

The team split into two smaller groups, each of which chose one of the organisation's strategic imperatives and used this to work through the 'The Four Columns of Communication' - the Pearlcatchers model for delivering an internal communications strategy. The team looked at the culture of the organisation and its implications for communications; linked communications to business strategy; and then went on to build an integrated strategy. Audiences, targets and messages were defined; communication tools considered; and support mechanisms identified. Finally they looked at how to integrate and implement the strategy, remembering to build in a review and redesign phase.

# CASE STUDY - COMMUNICATION

By building the course around real life priorities, the team not only understood and knew how to effectively use the model, but also had tangible outcomes and actions to take back into the workplace. The tone of the modules and the activities within the sessions reinforced the concept of working as one team towards common goals to assist in the formation of the new team. One of the delegates said: “The course was really enjoyable and gave us some excellent advice and ideas. We have already arranged a number of activities as a direct result of the training. We are planning a team away day to look at both the corporate and internal communications strategy.”

Following completion of this first phase, a number of specific training and consultancy requirements were identified to deal with both individual and team priorities. Firstly, six members of the team attended Pearlcatchers Voice and Body workshop as a follow-up to their influencing skills modules. This very intimate and practical day, uses theatrical techniques to enable delegates to use their voice and body as communication and influencing tools. The event works on areas such as voice awareness; relaxation and breathing; tone, projection and variety; linking voice with positive physical messages; body language awareness and developing a presence in different meeting situations.

It was also recognised that to truly move the team forward, it would be necessary to develop a detailed list of competencies. Starting with job descriptions, Pearlcatchers helped the team agree the key requirements for each role, split into three key areas - generic behavioural competencies (eg interpersonal sensitivity), specialist skills (eg campaign planning) and knowledge (eg communication tools).

Four skill levels were identified from new starter to department manager and each of the competencies mapped against the appropriate level. Detailed descriptions of each item were then agreed and collated into a Competency Directory for recruitment and development purposes.

Finally, two matrices were designed to identify current skill levels in relation to the agreed competencies. Firstly, an individual skills matrix for each team member to clearly see which areas they need to develop. Secondly, a team skills matrix, which both enables the department manager to ensure that the team have a full complement of skills and also allows team members to identify who best to ask for advice / coaching on areas they need to develop.

The team have made significant progress and are currently working with Pearlcatchers to set up learning contracts and form learning sets, together with individual coaching to work on any skills gaps identified by the new competency framework. The Internal Communications Manager commented “I just wanted to say how much we all enjoyed the modules and to congratulate Pearlcatchers on an excellent programme of activities. We had a number of specific training needs and they managed to capture all these and provide us with some superb advice and ideas. Thanks so much for all you’ve done”

Pearlcatchers offers training needs analysis for both the public and the private sectors and designs bespoke development programmes on a wide range of topics relating to communication. These include ‘The Manager as a Communicator’ – communicating change, dealing with meetings, interviews, appraisals and discipline skills; and ‘Communicating in the Modern World’, which aims to overcome the frustrating issues of e-mail, remote working and globalisation.

# CASE STUDY - CREATIVE THINKING

## *Developing Creative Thinking at the Electoral Commission*

The Boundary Committee, a specific department within the Electoral Commission where traditionally work was very process driven and regulated. Employees did not often have the opportunity to come up with new ideas – in fact the red tape and bureaucracy meant that change was very difficult to achieve.

However, the department was – like many government agencies – facing the possibility of a radical shake up and change in direction, which would involve the team in many more projects and new ways of working. They therefore decided that they need to increase the creativity thinking within the team and contacted us to develop a tailored programme

Due to budget constraints, it was agreed to hold a one-day workshop with a degree of pre and post –event work.

The main basis of the format was to consist of a number of short (15-20 minute) sessions to explain the theory, followed practical exercises to use the theory and 'learn by doing', which ultimately is the best way to embed learning. The morning focussed on understanding creativity, how it works and what competencies are required, using several short exercises to embed learning.

The afternoon dealt much more with the practical application of creativity with an introduction to our Creative Thinking Toolkit, as well as two longer 'creative challenges'. The event was concluded with a debrief, learning review and action planning for future development

Approximately 2 weeks prior to the main learning event, a questionnaire will be sent out to all delegates to complete and return to Us. The purpose of this objective is two-fold:

- To create energy and interest in the forthcoming event
- To provide some background information on the current thinking and capabilities of the team in relation to creative thinking

### **Morning Session – Understanding Creativity**

- Exercise 1 - Ice-breaker
- What is creativity?
- Why do you want to be more creative?
- Dispelling Myths about Creativity
- Exercise 2 – Mind Workout
  
- The 4 core competencies for creativity:  
Capturing, challenging, broadening and surrounding  
Very brief intro, which will be built on following each exercise
- Exercise 3 – Capturing
- Exercise 4 – Challenging
- Exercise 5 – Broadening
- Exercise 6 - Surrounding

# CASE STUDY - CREATIVE THINKING

- Introduction to the Seven Habits of Creative Thinkers
  - Going beyond the nine dots
  - Welcoming chance intrusions
  - Listening to your depth mind
  - Suspending judgement
  - Using the stepping stones of analogy
  - Tolerating ambiguity
  - Ideas banking
- Exercise 7 – How creative are you (questionnaire and discussion)
- Debrief and learning review from morning session

## **Afternoon Session – Using Creativity**

- Exercise 8 - Energiser
- Introduction to Creative Thinking Toolkit
- Creative Challenge 1 – Using Six Thinking Hats  
(This workshop will touch briefly on strategic thinking)
- Creative Challenge 2 – CSI – using technique of your choice
- Debrief and learning review from afternoon session
- Postcards from the Future
- Action plans – personal and team

# CASE STUDY – CULTURE CHANGE

## Using drama to design a new organisational culture

***Corporate culture, once an ivory tower topic for business scholars and sociologists has become an issue of vital concern to managers, executives and consultants on the front lines of change. It is never more important than when creating a completely new organisation from disparate groups of employees. This was the situation facing High Peak Borough Council when they were setting up a new company to manage their social housing activities.***

Previously, this was coordinated mainly through Housing, with involvement from other departments, such as Maintenance. As from 1<sup>st</sup> January 2004, a new organisation – High Peak Housing – was being set up run as an autonomous company, responsible for all activities relating to social housing. This involved the transfer of 120 existing council employees from Housing and other areas, such as Finance, HR and IT. The new Chief Executive recognised that this would be a huge adjustment for these employees – many of whom were used to little or no change in their working environment.

So she contacted Pearlcatchers to design and run their inaugural staff conference with the objectives of getting employees (many of whom had never worked together before) to think as a team and feel part of the new company, to overcome the fear of change and to establish the core values and culture of the new organisation. Pearlcatchers developed a series of different activities, which pulled together all these objectives.

The day started with the icebreaker ‘Desperately Seeking’, which got the new team members talking to each other by having to find the other half of their pair (eg Laurel and Hardy). The new Chief Executive opened the conference by talking briefly about her ‘vision’ for setting up the new company and the aims and objectives for the day. An Issues Board was also announced, where delegates could ‘post’ any queries or issues they had about the changes, so that they didn’t negatively impact the flow of the day.

Having spent a little time getting to know each other, the next task was to tackle concerns regarding the change. One of the main reasons employees resist change is fear and anxiety – which translate into stress, resistance and underperformance. In this interactive session, Pearlcatchers performed a live recreation of the ‘Who Moved My Cheese’ parable, a fun session which demonstrated in simple terms people’s different attitudes towards change and introduced strategies for coping with change on a personal level.

This was followed with small group discussions on what change meant to individuals and the ways in which they are affected by change. Sharing this information demonstrated both that people were not alone in their fears and that there was a recognition that change could be positive, if handled correctly. A good starting point on which to build the rest of the day.

One of the key objectives of the conference was to get the team involved in designing the culture of their new organisation. However, to do this successfully, the delegates needed to both understand the concept of culture and have a method or process to follow. So, through an opening sketch of a board meeting, the delegates were introduced to Big Bucks Unlimited, a once successful manufacturing company. The Chairman, Basil Bigwig told delegates that he was relying on them to analyze the culture of Big Bucks Unlimited and to decide “Who Killed the Motivation?”

# CASE STUDY – CULTURE CHANGE

Delegates were then introduced to the Cultural Web - a tool to identify and /or design the culture of an organisation. The Cultural Web is made up of six 'strands' each of which deals with one of the areas that contribute to creating a culture - organisation structure, routines, stories, symbols, controls, and power. These strands are then pulled together to form the paradigm of the organisational culture.

Each team had the task of analysing one of the six strands by interviewing a selection of Big Bucks employees, such as Simon Scrooge, Dottie Daydream and Sally Smartypants, who between them possessed all the information they needed. The teams were then rearranged to include at least one representative from each strand and given their second task – to agree the paradigm and identify the culture within Big Bucks. Each team then had the opportunity to feed this back both the 'board' and the rest of the delegates and suggest ways that their situation could be improved.

Following lunch, delegates were asked to create a coat of arms to represent some of the key qualities that they would like the new company to possess. Each coat of arms is divided into several sections to represent different aspects of the business, such as performance, customer/community care, employee attitudes etc. Armed with multi-coloured sheets of card and an array of pens, pencils and paints, the delegates got amazingly involved and creative during this activity. T

Having learned how to use the cultural web and identified some undesirable aspects of culture, the participants took this knowledge – together with ideas that started growing during the post-lunch energiser – and began to develop the basis for their desired culture in the new organization. Facilitated by the Pearlcatchers' team, small groups were asked to reverse the process they had followed with Big Bucks. Firstly, they discussed and agreed the paradigm they wanted the new organisation to have. They then considered what specifics would need to exist in each of the strands to make this paradigm a reality.

Finally, delegates were encouraged to take personal ownership and accountability for the success of the new organisation. Everyone was given a 'Postcard from the Future' and took part in a short piece of guided imagery to help them visualize their future. On one side of the postcard they were then asked to write down what they would ideally like the new company /their work situation to be like in one year's time. Then on the other side, exactly what action they 'had taken' to help move towards their vision.

As they were leaving delegates were asked to jot a few words on a post-it note to indicate how they felt about the day and the future. A summary of this included: "An enjoyable, informative, interesting and thought provoking day. Inspired - there was great insight into how we are all feeling and the day has helped us to establish the values of the new company. Although I was not looking forward to today – I now feel a lot more positive and enthusiastic as a result of how well staff have interacted together"

Pearlcatchers offers consultancy and development on a wide range of topics relating to culture and change management. These include leading / managing people through change; influencing, facilitating and participating in change; assessing, designing and changing culture, developing internal consultancy skills and organisational design.

# CASE STUDY – CUSTOMER CARE

## Introducing a Customer First Policy into the Public Sector

**If you don't like the service you can always vote with your feet. But what happens when customers don't have that choice? If you live in social housing, going elsewhere is not an option. And without the reality of commercial pressures how does a public sector body change to a customer first culture.**

**Historically set up to deal with social housing in the public sector, this was just the problem facing one established Housing Association as it (like many others) moved towards taking on private sector activities such as shared ownership and offering property for rent at market prices. It recognised that it needed to change its culture to one of putting the customer first.**

Although a tenant survey had shown generally high levels of satisfaction, there were a number of areas highlighted as in need of improvement. That is when they called in Pearlcatchers to review all customer care activities and to design and implement a customer care strategy. Pearlcatchers understand that customer care is not simply about setting up or training the staff in a customer service department. It is the underlying culture of the organisation and all employees have to commit themselves to the new ethos.

Pearlcatchers carried out a six-phase project to audit their customer care capability. Number one on the list was communicating with the employees at every phase. The Project Manager within the association explains "We had to get rid of the 'customer care is not my job' attitude. Putting the customer at the heart of everything was our ultimate goal and we couldn't do this without changing the organisational culture and getting staff to commit themselves to the new ethos."

Involving staff at every stage in the process was key. As well as reviewing processes, visiting sites and talking to customers, the audit involved over 60% of the staff in a series of one to one meetings, team discussions and focus groups to put forward their views. The audit resulted in a number of recommendations that jointly would work towards establishing customer care as the foundation of the organisation. This kind of undertaking cannot be implemented overnight. So two initial priorities were agreed:

Firstly, there needed to be a Customer Charter- the client's vision of customer care and the foundation on which all its activities are built. To stop the Charter being just another worthy document that is ignored in practice, it was drawn up by a team of representatives from each department and the rest of the organisation was asked via a questionnaire for their input and feedback.

The Customer Charter sets out the organisation's promise to its residents both in terms of how they can expect to be treated and in relation to 15 key Service Guarantees, such as handling customer complaints.

There were half-day workshops for all employees to look at their perception of customer care and consider what the Charter would mean for them in their day to day role. The Charter was initially launched internally to allow employees sufficient time to identify and resolve any potential issues in achieving the commitments made in the Charter. It is currently being launched customers, suppliers and the general public.

# CASE STUDY – CUSTOMER CARE

Next was to set up a Customer Advisory Team as a centre of excellence for customer contact. This new team brings together the previously disparate roles of switchboard, reception and the maintenance repairs line, as well as taking on additional responsibilities such as ownership of customer enquiries and complaints.

Setting up the team involved a multitude of different activities for Pearlcatchers and their client. Following the physical relocation to the newly refurbished Reception area, the first task was for each of the team members to learn each other's roles. To ensure that the team were able to handle general customer enquiries for all departments, it was also essential that the team gain an understanding of the roles, responsibilities, processes and constraints of other parts of the organisation. This is being carried out over several months and will involve each member of the team spending time in each department, as well as on the road on maintenance calls and at Sheltered Housing Courts.

Next there were a number of skills that the team needed to develop or improve for them to be confident and successful in their roles, such as confidence/assertiveness, coping with change, dealing with customers face to face, handling conflict and influencing skills. Another key area was involving the team in the development of their new roles, including processes, systems and support mechanisms. It was agreed that they should become owners of customer complaints, so Pearlcatchers worked with them and representatives from across the business to design a new Compliments, Comments and Complaints Process.

This involved mapping out the existing process and identifying issues at each stage; benchmarking best practice with other housing associations and asking customers how they would like their comments and complaints to be handled. A new process was then designed, together with customer documentation, guidelines for employees and a computer logging system to both monitor progress and produce reports. The process also links back into the organisation's Business Process Management system with the facility for customer disputes (where a customer believes that the organisation's policies are incorrect) to be reviewed by the cross-functional Quality team.

The new process is being rolled out to employees as part of the next development phase of the Customer Care initiative. This will involve one-day workshops for all employees which will use experiential and drama-based learning to further embed the new ways of working and the culture of personal ownership and accountability for customer care. This will then be followed by the creation of a Customer Care Forum – a regular cross-organisation meeting, chaired by members of the Customer Advisory Team to discuss issues relating to customer care.

Together Pearlcatchers and their client have got rid of 'the customer care is not my job' attitude that had existed. They have laid the foundations for an effective customer care culture and policy that all the staff own and are committed to. And together they will regularly review and assess progress to make sure that the objectives are met.

Pearlcatchers offers consultancy to both the public and private sectors and designs bespoke development programmes on a wide range of topics relating to customer care. These include recognising the internal customer, developing customer service skills and designing a customer care strategy.

# CASE STUDY – CUSTOMER CARE CULTURE

***Willow Park Housing Trust is registered social landlord based in South Manchester, with around 7,600 properties and we have around 330 staff. Whilst their customer service performance is good – with around 80% of customers satisfied or very satisfied – the trust is keen to improve further and to make the move ‘from good to great’. To do this they commissioned customer care training for all employees and following a recommendation from another housing association, approached Pearlcatchers to design and deliver this training. Our initial research identified that the trust were keen for this not to be just a one-off event, but part of the mainstream culture of the organisation. Another key objective was to improve communications and understanding between department***

We therefore recommended six one-day sessions with approximately 60 delegates on each. We designed the day to be very interactive with delegates working in different groups throughout the day, which would have the wider benefit of building relationships and awareness across the organisation. The day was roughly split into two sections: the morning focussing on attitudes to customer care / tenants and how this could be improved; the afternoon focussed on the skills needed to deal with difficult customer situations

We started with a brief introduction to the day in which the theme ‘good to great’ was introduced and we emphasised that the day was not a criticism or a lecture, but an opportunity to share knowledge and learn or refresh some skills. We then moved into our ice-breaker – World Café – this is a form of collaborative dialogue process, where we create a space where people feel comfortable and sit in small groups around tables as if in a café. We then used a series of ‘appreciative enquiries’ around the topic of customer care – the idea being that you create a completely different atmosphere when you focus only on the positives of a situation and ignore any negatives. The questions we asked were: “When have you experienced excellent customer care and what was it like”; “What might excellent customer care look like at Willow Park?” and “What is excellent already about customer care at Willow Park?” After each question participants move between the tables, meet new people, and actively contribute their thinking and discoveries. The session ended with all participants having a good idea of what needs to be done to achieve excellent customer care at Willow Park

For the event, we scripted a piece of forum theatre, which is based on an organisation that delegates can relate to and shares some of the same issues. The sketch is humorous and allows delegates to comment freely without any potential for defensiveness. We set this sketch in a maternity hospital, which experiences similar issues in terms of dealing with people from all walks of life about something which is very close to their heart (having a baby v your home). After explaining how the concept works, we performed the sketch and then split delegates into groups and asked them: what is going wrong; how can things be improved and how do / could these issues relate to customer care at Willow Park? Delegates then took a short break whilst we collated feedback and decided on ideas for the replay. We then improvised a replay of the sketch giving delegates the rare benefit of hindsight and how a few simple changes can make a huge difference to customer care.

Having now identified both what constitutes excellent and poor customer service, the session moved onto improving customer care at Willow Park. One of the key differentiators of excellent service, is personalising the service. So we explored this concept more using our Customer Values exercise, by asking: ‘who are your customers and what do they want?’ We start by advising that whilst we don’t want to put people in boxes – it is very hard to personalise a service when you are talking about 7,000 properties, so to focus a little more, we ask delegates to call out as many different customer groups as they can – both types of tenant and other customers, including colleagues, council agencies etc. Delegates were then split into groups again and each group given one tenant and one non-tenant group to discuss. The groups first identified some key characteristics of that customer ‘type’ (recognising that even within groups there are different needs). They then put themselves in the customer’s shoes and consider what would be of most value to them – in terms of service from Willow Park. Finally we asked them to consider what Willow Park could do to improve the service to

# CASE STUDY – CUSTOMER CARE CULTURE

After feeding back some of the key suggestions, we briefly identified some of the hallmarks of organisations with outstanding customer service. However, with the best will in the world, sometimes this is not always possible due to various barriers and issues within the organisation. We handed out a picture of the Square Wheels cart and asked for comments from delegates – the key points being that every organisation has some ‘square wheels’ that it is probably just used to working with, even though they probably also have some round wheels if they took the time to look for them. We split into groups again and asked them identify some of these barriers and then suggest ways to overcome them

We had agreed that the afternoon session needed to provide delegates with some tools and tips to deal with the difficult situations they face – which are often the ones that can impact customer satisfaction. Therefore, the majority of the afternoon was spent in the Scenario Practice Sessions. However, we started the afternoon with an energiser session both to embed what they have covered in the morning and to wake them up / engage the right (creative) side of the brain. This involved getting teams to come up with their own company coat of arms in relation to customer care, using a full range of craft materials.

The focus of this session was around dealing with difficult situations, so after consultation with the management team, we wrote three scenarios: the first dealing with a colleague who has not kept a promise to a customer; the second dealing with communication across cultural and language barriers and the third dealing with a potentially violent tenant with mental health issues. For each scenario we had two actor / facilitators who played out a ‘how not to’ version and then asked for feedback on what was wrong and how to improve. This led to discussion to various aspects of theory that we had included in their support packs for each scenario, as well as a couple of short exercises, exploring areas such as personal space, conflict strategies and ways to deal with stress / high emotion. Each scenario lasted for 30 minutes and delegates experienced each in turn on a rotational basis. The session concluded with a review of learning points and identification of what other support they would like to develop further

The final part of the session was aimed at getting delegates to realise that everyone can make a difference to customer by putting their ‘personal signature’ on the job. We started by telling the story of a supermarket ‘bagger’ who had Down’s Syndrome, but who was so enthusiastic about creating his own personal signature that he inspired customers and colleagues alike and according to the shop manager ‘transformed our store’. Each delegate was given a postcard and asked to think about their customers and to commit to one or more things they could do to put their own personal signature the job and to create memorable experiences for their customers. Delegates then dated and signed the cards to emphasise the commitment they had made to themselves.

The day finished with a brief summary and we then asked for some immediate feedback as they left on 1) how the day went from them and 2) how optimistic they were that Willow Park could go from good to great. Below is a summary of the feedback. We are now working closely with Willow Park about how to maximise the enthusiasm and commitment raised by these events. They are planning a range of local / team-based activities, cross-departmental projects and knowledge sharing and implementation of some of the excellent suggestions from the various discussion groups.

***“The best training I’ve had in 20 years!”***

***“A great day – interesting and thought provoking”***

***“I wasn’t looking forward to today, but I thoroughly enjoyed it – especially the team work”***

***“I was very impressed – the day was fun, informative and relaxed”***

# CASE STUDY – EMBRACING CHANGE

North Wiltshire District Council is one of four district and county councils that are the process of merging into one organisation by 1<sup>st</sup> April 2009. Some parts of the organisation are already heavily involved in the changes (particularly those whose areas are merging first), but others have had little or no involvement to date. Training modules had been organised for managers across the councils to help them manage change in their areas.

However, it was felt that there was a need for some workshops for all employees to help them to embrace change and become involved in the process, so that they could have an impact on what ultimately happens to them and their jobs. This was felt to be particularly relevant because at the start of the assignment the neither the new structure, nor the locations where staff would be working in future had been finalised – leaving employees in a state of limbo, having to cope with a lot of unknowns. And as a wise man once said *“The misery of uncertainty is worse than the certainty of misery”*

It was in this atmosphere that Pearlcatchers were asked to design and deliver four workshops that were to be interactive and fun and offer employees the opportunity to explore their feelings and concerns about dealing with the changes ahead. After a short, funny introduction session, we immediately split delegates into groups of 3 or 4 to explore their personal experience of change. Our intention was to help them to see that change can often have positive effects, so we used a series of ‘appreciative inquiries’ to tease out their happier experiences. To keep energy levels high, they moved around to different groups, with our facilitators giving an update on the previous question before moving on – in this way we involved people in a ‘whole group discussion’ without the nerves of being the first person to speak in front of twenty others! The questions we asked were

- Think of a change you have experienced that was very positive. How did it feel
- What specifically made it a positive experience
- What learning can you take and apply to other change experiences

Next we moved onto a live recreation of Spencer Johnson’s iconic ‘Who Moved My Cheese’ using our actor / facilitators to play the little men and mice, with the lead consultant as narrator and key slides to back up the main points of the story and its messages. We then split delegates into four different groups to discuss what the story meant to them and which aspects of the different characters they would identify with themselves – and others. After briefly talking through the key drivers of each character, each group were then asked to discuss the character of the actor they were working with. They were asked to consider the advantages and disadvantages of their character when dealing with change and to then offer them advice to help their character to better handle change. After feedback from each group, individuals spent a little time considering whether any of these tips many useful for them when dealing with change in future.

The focus so far had been on the individual’s reaction to change. However, for people to truly embrace change in the workplace, it is necessary for them to understand a little about the need for continuous improvement in organisations and then to link this back to individual challenges. We started this section by asking delegates to consider what are the main barriers that they come across when going through change. We then explained that there are two main types of barrier – organizational and personal and listed up the delegates’ suggestions, splitting into these two categories.

# CASE STUDY – EMBRACING CHANGE

We then told a story about a pike is separated from minnows by a glass divider and after battering its snout against the divider, eventually gives up – even when the barrier is removed. We explained that barriers can be real or imaginary, rigid or flexible and then introduced them to the expression – “God grant us the courage to change the things we can, the serenity to accept the things we can’t and the wisdom to know the difference” - which we use as the basis of our process of managing change and stress. In groups delegates brainstormed ways that they could help to change or minimise one of their barriers.

After lunch we started with an energiser where a ball is thrown from one person to another until everyone has thrown / caught. This then becomes a process with each person having a number – which they are asked to improve themselves. When they are comfortable, the facilitator then makes a major change to the process and asks them to try again. This is a great exercise for examining the difference in your reactions when a change is your choice versus something that is imposed – and also how quickly you can learn to adapt

We then briefly introduced delegates to the transition curve people experience during change and the emotional stages of change and map these onto it. To demonstrate how people are affected by these emotions we played a short game – The Wedding Reception from Hell – where delegates become guests at a wedding, each at a different emotional stage. They have to guess which stage each person is at and we then provide some tips on helping themselves and others at each of these stages

We then talked through the basic theories of resistance and that it is quite natural for people to resist change. The actors then played a series of scenarios based in a fictional organisation going through change, where the employees were showing various forms of resistance. After each role play we discussed that type of resistance and afterwards each group was given a character (including the manager) and asked to coach them to be able to deal with change a little better. We then replayed the sketches quickly to see the difference that a few small changes can make.

For the final session, we looked a little more about ‘embracing uncertainty’ using the work of Susan Jeffers on the wonderful possibilities that life can deliver if you are open to them. This session challenges delegates as to whether they would really like to know everything that is going to happen to them – from the ending of a film they are going to see, to knowing how and when they will die. We talked briefly through some of the key points and provided much greater detail for delegates to take away and think about on their own

We finished with our Postcards from the Future exercise, where we used guided visualisation to get delegates to think of themselves one year in the future when they have coped well with the current changes. We then asked them to note on their postcard of what the future looks like and what they have done to get there. This then leads into a section of personal action planning for them to consider what they now want to do to help them cope better with the current (and future) changes. Feedback was universally positive, with a summary of comments detailed below:

*“Thought provoking with time for reflection. Inspiring talk – motivational. Engaging the whole group. Enjoyed the use of actors/actresses – a great way to learn and a fun take on embracing change. Very mature, professional group of trainers / facilitators. The course was a day well spent! Quite emotional at times but has made me question why I am afraid of everything – and taught me to be proud of what I have achieved and to be less afraid in the future. Brilliant day, thank you.”*

# CASE STUDY – EMPLOYEE ENGAGEMENT

*The mission of the Staffordshire Library & Information Service is “To deliver an excellent customer-focused service in an innovative way in partnership with others, investing in staff and improving performance to attain standards”. As with many library services, Staffordshire had been ‘going through changes’ and moving to ‘new ways of working’, when they first contacted Pearlcatchers regarding their staff conference. Much progress had been made already, particularly in terms of access, environment, stock and marketing. There had recently been huge physical, process and cultural changes within the service, such as partnership working, setting up one stop shops and being more creative / empowered.*

The theme we agreed for the event was ‘passion and pride’ with the overall aim of encouraging employees to be passionate about their customers, their services, their organisation and everything they do – and to be proud both of their achievements so far and the role they play within the community. A key aspect of this theme was the new ways of working that will enable the library service to create memorable customer experiences:

- reinforcing what they had learned already, but emphasising that excellent customer service is more than ‘skin deep’
- Overcoming stereotypical image of ‘librarians’ – the librarian as host or sales person
- Coping with the pace of change and embracing innovation and new ideas
- Working with partners

**Stage 1 – The Journey So Far Video** - A key part of the objectives was for employees to feel motivated and proud of what had been achieved so far – even (especially) those who were not attending the conference itself. Pearlcatchers were assigned to plan, shoot and produce a video that could both be shown at the conference and distributed to other employees. The video was split into four main sections, which related to the key priorities of the service: access, environment, stock and marketing. As well as background reading and planning, we visited a number of libraries around the region, each of whom had interesting developments to report on. Whilst there, we filmed the environment and interviewed employees and customers about the changes they had seen. This footage was then taken away and edited to provide a short motivational video for all employees to see.

**Stage 2 – The Conference** - Olivia Spencer, Head Librarian opened the event and showed the video that had been produced. A short presentation then re-emphasised some of the key improvements. The presentation was followed by an icebreaker “Customer Service Means” to get people talking and thinking about one of the key themes of the day – customers – and specifically to discuss various definitions of service and how they might relate to customer care in their own organisation

In the next section, we introduced delegates to a piece of forum theatre. Delegates to the conference were immersed into the world of Avago Antiques where things are not going well. Despite the fact that the shop is looking lovely, there are no customers – and those that do come in are scared off by the condescending attitude of its owner, Camilla Conventional. This results in Camilla having to sell the shop to Anthony Antiquity (an interesting cross between David Dickinson and Lovejoy) and she and the rest of the staff struggle to cope with the changes. The sketch ended up in a stand off between Anthony and Camilla and the delegates were then broken into groups to discuss the issues that were raised by the sketch, relate them to their own experiences and suggest ways that the situation could be handled better.

# CASE STUDY – EMPLOYEE ENGAGEMENT

The initial sketch was written specifically for Staffordshire to both reflect the progress made so far and the areas that still need to be tackled, such as the librarian as host and moving away from the traditional 'old-fashioned' view of librarians. After a short break, delegates were able to watch the next chapter in the story of Avago Antiques which was improvised based on the feedback received from the groups.

During the next exercise "Customer Values" delegates took some time to identify *who* are their customers, *what* they value and *how* you can meet their needs. Delegates were asked to call out different types of people that use their services and then consider characteristics for each type of customer and (based on this) what they believed to be of value to each type of client in terms of what services they offer.

The final session before lunch was a presentation from the senior team that followed on from Olivia's opening address and introduced the 'aspects of the future' which were to be discussed in the afternoon's breakout groups

The first session after lunch took a light-hearted view on the changing image of the librarian and attempted to challenge some of the preconceived ideas about library staff today. Using the style of a spoof documentary, we first introduced the stereo-type of Edna (an older woman, with her hair in a tight bun, wearing glasses, a cardigan, and says "Shh" a lot) and then various other possible images for the librarians of the future including a computer geek, a pub landlord and Batgirl! Having sent the various images the librarians were asked to consider 'who is the real librarian?' The final thought was that it was up to all of the audience to move beyond the stereotypes and create their own image for the future

This idea was then developed further in the next exercise, where delegates were split into groups and asked to design their own coat of arms based on the qualities they wanted their organisation to be known by. This was followed by break out discussions on the vision presented earlier and delegates were asked what actions could be taken by anyone (locally as well as management team etc) to move towards the new objectives. Pearlcatchers facilitated this as well as all other sessions

The final activity of the day was a piece of guided visualisation, where delegates were asked to complete their own 'postcard from the future' imagining that they are sending a postcard to themselves one year in the future. As part of their standard follow-up, Pearlcatchers typed up all the notes from the day and suggested ways in which the impetus from the day could be carried forward through communication and ongoing activities. Some of the feedback from delegates includes:

*"It was a thoroughly enjoyable day and certainly made me think! The group activities were friendly and non-threatening and allowed you to mix with lots of people."*

*"The forum theatre was a good starting point for discussion and images stay longer than words!"*

*"I really felt part of the Service and was impressed with the level of energy that was generated."*

*"Having outside facilitators was a great idea – and they were excellent! Congratulations on such an enjoyable and relevant day."*

# Case Study - Disability Awareness

***Lee Housing Association is a small residential social landlord whose employees had previously been through Equality and Diversity training, which covered disability at a basic level. However it had been identified as part of strategy planning, that employees needed to go through a detailed disability awareness programme. The client wanted all employees to attend the training from the Chief Executive to housing officers, reception and administration staff***

After a short icebreaker, we split delegates into small groups to discuss their 'definition' of disability, their experience in dealing with people with disabilities and their objectives for the session. We then moved onto 'the facts and figures of disability, where why disability awareness is so important at the same time as increasing awareness of the issues experienced by people with disabilities. Rather than a long presentation, we did this in the form of a multiple-choice quiz with delegates split into teams with little prizes for the winning team. As we went over the answers, we explored the issues that the points made and led into a full group discussion. The trainer then finished with a short presentation to confirm the key facts around disability and the Disability Awareness Act.

One of the biggest issues for disabled people is the attitudes and stereotypes that others have towards them. To explore this concept we worked through the How Old Were You exercise where delegates are each given a different type of disability (including those not always considered as disabilities such as HIV) and individually asked to consider when and how they first heard about this group and the impact on their attitude then and now. They then paired up with a colleague and shared whatever they were comfortable with discussing in terms of anything that the exercise revealed.

We then had a short group discussion about stereotypes, where they come from etc. This generally reveals that the media has quite a crucial role to play in this. We then looked at the different ways that disability is portrayed in the media. Delegates are then given some personal time to reflect on their various influences and what they can do to change them. This exercise can be very revealing about some beliefs we hold without realizing it

We then spent some time getting delegates to 'experience disability'. This is a very practical exercise which physically demonstrates some of the constraints of being disabled when trying to perform tasks that seem quite simple to 'able-bodied' people. One half of the delegates become people with disabilities (eg blindfolded, earplugs to show hearing impairment, one hand tied behind back, not able to speak, using a wheelchair / walker etc) The other half are their helpers and had to assist them without asking in advance how they would like to be helped whilst we carried out a physical activity such as playing catch or bowling pin target practice. We then had a short debrief on how this felt – particularly in terms of how they felt being 'helped' by the able-bodied people. We then got the pairs to have a conversation about how their disability felt and what would have helped them in terms of being 'helped'. We then swap to both give the helpers the chance to experience being disabled and to see how the helpers add much more benefit when they communicate fully with the disabled person. This is then followed by a further debrief and personal reflection on what has learned by this experience and how this might alter the way you (both personally and as an organisation) treat people with disabilities in future We then took the outputs from the previous session and started to look at 'what does this mean to our customers?' We did this by a variation on our Customer Values exercise, where we identify different 'groups of disabled people'.

# Case Study - Disability Awareness

In small groups delegates considered some characteristics of this group, what they might most value from the organization and what could be done both by individuals and the company to improve the service they offer to that group. There are usually some common themes, such as respect and understanding which we identify from a feedback session and some of the suggestions were then transferred into the organizations 'Disability Action Plan'.

The focus so far had been on people's disabilities, but a key part of our training is around understanding the many talents and abilities that exist also. We used a short exercise where delegates had to pair famous people with both their achievement and their disability. We looked at some of the great achievements of disabled people, such as the para-olympians and Helen Keller the blind author and then got delegates to try translating some Braille and sign language. We then had a small group discussion and personal reflection on this aspect.

We then spent some time looking at how your underlying attitudes, fears etc which can come through in the way you communicate with a disabled person and considered how you can ensure that you do not offend or embarrass the other person. We also talked about appropriate language and etiquette around people with disabilities. We gave examples of some of the typical faux pas that people commit and how they might avoid them in future

One way to help with personal reactions (and closely linked to ability awareness) is a concept called conversity, which we use regularly in diversity and inclusion training. It works on the idea of taking advantage of our natural instinct to group people (like stereotyping). Basically, it is about trying to focus on your similarities with others (in this case people with disabilities) and find common ground rather than focusing on one obvious difference. We introduced the concept and then examined how delegates could use this practically in their day to day life.

During the session we had given delegates a lot of 'food for thought', so after a short review of what we had covered, we gave delegates the chance to reflect on their experience. Using a form with key questions, delegates looked at what they have learned, made a personal commitment to be more 'ability aware' and created a personal action plan about what they were going to do next. We also spent a little time planning at an organizational level, in terms of what you need to do for your customers etc.

The programme was very successful and we are now discussing rolling a strategic version to board members. Feedback from the event includes:

*"Well presented, educational and entertaining - lots of issues were raised and investigated."*

*"Excellent! I enjoyed the exercises they helped illustrate the problems."*

*"I now have a greater understanding of disability and particularly relate to the concept of person first disability second."*

*"Very thought provoking"*

*"As a result of the training I will try to allow more time for people with disabilities, treat people as individuals; be more aware; have better understanding; give respect and most importantly, listen."*

# CASE STUDY – DIVERSITY & INCLUSION

*IDIS are a pharmaceutical organisation that deal internationally with suppliers and clients. We have worked with IDIS for over two years to both design and deliver training courses (personal effectiveness, managing sickness absence, presentation skills etc) and consultancy (designing a competency framework, introducing a mentoring scheme). IDIS has a set of core values using the acronym PASSION. They asked us to design a session for their corporate induction programme that looks at diversity and 'valuing our people'. The overall objectives were to link back to the core values to show how the organization values its employees and how they can value others. The brief wanted the session to be very interactive and include a range of activities. Therefore, we designed the session to include two options for each activity depending on the time available.*

## **Session 1 – Introduction and Icebreaker**

Delegates were asked to recall the core values at IDIS (PASSION) and the trainer then explained that IDIS are passionate about valuing their people. They then had a short discussion on which of the values most link to this. After a short introduction to the purpose of the event, delegates then go straight into the first activity either – We're All the Same but Different or Personal Ad Billboards. The first activity demonstrates visually some of the similarities and differences we have with each other. The trainer calls out a number of characteristics or facts that may apply to one or more of them. Delegates stand up if the characteristic applies to them and sit down if it does not. Whilst doing this, they look at the rest of the delegates to see the similarities and differences

In Personal Ad Billboards, delegates create their own 'personal ad' by choosing four from a choice of descriptors and adding one of their own. They then have to pair up with someone with a similar profile and use a handout to talk about the advantages / disadvantages of their similarities. The second round involves the same process but with people with different profiles. The final round involves forming into teams with a diverse selection of members and how they might function together. Both exercises lead into discussions about the advantages of having both similarities and differences with others

## **Session 2 - How We Value our People**

This session consisted of a brief presentation on the key policies at IDIS to ensure that people are valued – such as Sickness Absence, Performance Review, Bullying & Harassment and Equality & Diversity. The key point around Equality and Diversity is that although there is a policy to deal with any problems, the company feel it is more important for all employees to understand the benefits of diversity and to recognise the importance of treating everyone equally and with respect. This formed the basis for much of the discussions in the rest session

## **Session 3 – Understanding Equality and Diversity**

We first showed a couple of slides explaining what a diverse culture is all about and why diversity matters. We then asked delegates to explore what is the difference between equal opportunities and diversity. Equal opportunity and diversity are not the same things. Many people use the terms as though they were interchangeable. They think that "diversity is what we call it now". This is a serious error with important implications for the decisions an organisation might take in addressing diversity and equality issues.

So we briefly explained the key points (and legislation) relating to equal opportunity and the requirements on organisations. Diversity, however, is a given. It is not an option or something to decide to have or not to have. Where there are two or more people, you have diversity. Diversity is difference and we are all different from each other.

# CASE STUDY – DIVERSITY & INCLUSION

We then asked delegates to call out some of the differences that might exist between different people (such as family background, age, religious beliefs etc). We explained that one of the issues with diversity is that human nature likes to categorise people and things and this ends up with stereotyping. This in turn can lead to prejudice and potentially discrimination. We will now do an exercise to explore the way that stereotyping affects our first impressions of others

## **Session 4 – Stereotypes and Prejudices**

To explore these concepts in more detail, we then move onto either Driver Portraits or How Old Were You? activities. In Driver Portraits, delegates are split into teams and each given pictures of several vehicles and asked to consider who drives each vehicle and make up their 'background'. This then leads to an activity to explore the stereotypes and try to come up with other less-stereotyped possibilities. In How Old Were You, delegates individually pick a stereotyped group and take a few minutes to explore what messages they received and how this impacted their view of this group. They then discuss their findings with one other delegate. We then feed back on what they have learned and go through some very basic theory on stereotypes.

We then move onto prejudices and get delegates to explore in more detail where beliefs and prejudices come from. Now we have a more in-depth discussion on questions such as 'is it natural to have prejudices?' and 'are all people with prejudices 'bad people'?' Finally we brainstorm ways that we can change people's prejudices (both your own and other people's)

## **Session 5 – Conversivity / Working Better Together**

Another way to overcome prejudices and stereotypes is to look for similarities with others or what is called conversivity. We refer back to the icebreaker exercise and how this showed your similarities as well as differences.

There is a natural tendency for humans to gravitate towards people they perceive as similar. We feel comfortable, at ease, secure and able to be ourselves when we are with people like ourselves. Similarity, then is generally the order of the day. The old saying 'birds of a feather flock together' resonates strongly in most social settings and in many organisations. The concept of conversivity is to use this tendency to search for similarities with other people and use this common ground to explore and appreciate the differences you will inevitably have. In small groups delegates then come up with suggestions for encouraging conversivity. Alternatively, they play the 'What's My Style' activity, where delegates have to choose which animal is most like them. Together with others that chose the same animal, they then have to consider the characteristics, benefits and disadvantages of that style when working with others.

## **Session 6 – Wash up and Close**

We recap on what has been covered in the session and then give delegates a couple of minutes to consider what this has meant to them and anything they will do differently in future. They then discuss anything they are willing to share with a colleague and give feedback to the rest of the group.

# CASE STUDY – INTERNAL CONSULTANCY

## *Adopting a consistent approach to managing change*

***When creating a brand new team of internal consultants from both across the business and externally, how do you ensure consistent processes and skill levels, at the same time as engendering common goals and sense of purpose?***

This was the situation facing HBS, a leading supplier of business process solutions to the UK public and private sectors. Operating since the late 1990's, HBS has around 3,500 staff at sites across the UK and has Public Private Partnerships (PPPs) with a number of leading local authorities including: Lincolnshire, Bedfordshire and Milton Keynes.

HBS has, in the past four years, already invested more than £150 million in local government and more than 2,500 people have transferred to HBS from local authorities. To manage the increasing level of change both within the PPPs and the organisation generally, HBS decided to set up a central team of internal consultants. The new team incorporated a range of skills and knowledge, including:

- Internal recruits with lots of company knowledge and the basic, but no formal training on change processes or models
- External recruits who had their own tools and techniques for implementing change, but little or no knowledge of the organisation's own procedures and objectives
- IT specialists from one of their contracts, with council, project and IT knowledge, but without a consistent understanding of change management or their new organisation's ways of working

And that is when they called upon Pearlcatchers to design and run a development programme that would provide the entire team with the necessary skills and tools to effectively manage change within the business. Whilst the core objective related to skills transfer, it quickly became apparent that there was an underlying need to agree a common language, purpose and way of working and to break down silos between some of the different areas and projects

To both minimise the impact on day to day working and to embed learning at stage, the programme was planned as a series of two-day modules, once a month for four months. The first day of each module focussed in turn on each of the phases within the Cycle of Change – Pearlcatchers model for effective change management. The second dealt with the specific skills and / or knowledge required by effective internal consultants.

The overall format of the programme drew strongly from their Certificate in Organisational Change, but the content was tailored to the specific needs of the HBS team by focussing on those skills and stages that were most relevant to their roles.

The first module set the foundations for the entire programme by considering the fundamentals of change and why transformation efforts fail and introduced delegates to the first phase of the Cycle of Change – Recognising the Opportunity. Day two focussed on the skills and processes and roles of effective consultants – something that was quite new for many of the delegates and proved very helpful for some of them who commenced new projects during the programme in setting boundaries and scope.

# CASE STUDY – INTERNAL CONSULTANCY

The second module dealt with Phase 2 – Building Support for Change dealing with areas such as identifying stakeholders, creating and communicating a vision. The skills day looked at influencing – especially where you have no direct authority (as is often the case for change agents) – and introduced delegates to a toolkit of styles they could draw upon.

The third module moved onto Phase 3 – Planning for Change – an aspect often overlooked in many organisations – and focussed assessing the impact and building readiness for change. Day 2 looked at the skills required to ‘manage people through change’, such as supporting people through the transition curve and handling conflict and resistance.

The fourth and final module covered both Phase 4 – Implementing Change and Phase 5 – Embedding and Reviewing Change. Key topics included sustaining momentum and motivation, empowering others, embedding the culture and the link to continuous improvement. The skill day was spent mapping and practising the skills and processes of effective facilitation

The emphasis of the programme was very much on learning by doing. As such the modules contained a wide range of practical activities. Wherever feasible, the delegates split into smaller groups and applied exercises to actual projects they were involved in. This gave the added benefit that as well as learning from the experience, they had direct outcomes to take back to their projects after each learning event. The event was concluded with a feedback session and learning review, which elicited comments such as:

“This programme has added an extra dimension to my knowledge and study of change management and increased my understanding of people and organisations’ approach and reaction to change”

“I don’t think I’ve attended a course where the trainer was so obviously expert in the subject and with a flexibility and enthusiasm always at a high level. It has built on my current knowledge, given me a theoretical framework, linked this to my current work and helped me develop networks within HBS”

“The programme has improved my understanding of change and how best to approach it. It has also helped us to develop a consistent approach to change management.”

As well as the basic learning from the course material and tutor, the format of the event also allowed the group to learn from each other and gain a better understanding of each other’s strengths and where to go in future for expert knowledge. It clarified some issues about roles and responsibilities and initiated a programme of work to roll out a consistent framework for projects and change across the organisation. With help and support from Pearlcatchers, both the team’s colleagues and clients will now benefit from a consistency of approach to internal consultancy and managing change.

Pearlcatchers offers consultancy and development on a wide range of topics relating to internal consultancy, change and culture. These include leading and managing people through change; influencing, facilitating and participating in change; designing and changing culture; surviving mergers; e-transformation and organisational design.

# LEADING CHANGE AT SENTINEL HOUSING

***Sentinel Housing Association regularly run training / teambuilding events for their senior and middle managers. Pearlcatchers designed and delivered a two-day workshop entitled Leading Change at Sentinel with the objectives of helping managers learn how to embrace change – both in terms of change ‘forced upon them’ and proactively looking for new opportunities themselves; to understand the importance and learn the skills to both lead and manage others through change – and to recognise / handle the painful / emotional effects of change on their employees and specifically develop relevant skills around visioning, communication and influencing – with both employees and other key stakeholders. Day 1 focussed on the fundamentals / context of change, recognising opportunities, the role of leaders and creating a vision for the future. Day 2 focussed much more on the implementation of change, managing people and handling resistance***

After a brief introduction, we emerged delegates into a ‘change scenario’, entitled the Change Tower. They were split into competing teams and team was then split into managers and workers and placed in separate rooms. The managers have to plan a change and the workers have to implement it. Feedback from the activity brought sharply into focus some of the basic mistakes / key factors in managing change, which set the scene for the rest of the programme. We then introduced delegates to some of the fundamentals / models of change, including our own Cycle of Change and they rated their organisation against these. The Chief Executive then put change into context and the need to plan well, using the metaphor of the Battle of Agincourt. In the final session of the morning, we tool through Phase 1 of Cycle of Change: motivation for Change – externally / internally-driven change and concept of environmental scanning, this involved going through the environmental scanning process, scenario planning and SWOT exercise. We used this to identify priority changes / projects to look at for rest of workshop.

In the afternoon, we focussed on the need for inspirational leaders during change using our fast paced activity Identifying with Leaders from History. We then introduced the Leadership Challenge – identifying the 5 key practices for successful leaders: (challenging the process, inspiring a vision, enabling others to act, modelling the way and encouraging the heart) and got delegates to assess themselves both as individuals and a team against these practices. This lead to a small group discussion on team performance followed by plenary discussion and some time for individual reflection

A key part of the role of leaders is the ability to create an ‘inspiring vision’. We used guided visualisation to help to ‘see the future’ in their own terms. After some theory on working visions and the use of metaphors in creating visions/ pictures of the future, delegates were split into teams and asked to create their own ‘big picture’ to describe their vision of the future. Half the teams looked at communication to customers, the other half to employees. Each team also had to prepare the narrative to use with the picture and then present their Big Picture back to rest of group, which caused a great deal of energy and enthusiasm for the future. The final session of the day had the objectives of embedding learning so far and increasing teamworking in the leadership team. Each team were allocated two of Kotter’s Eight Fatal Errors and tasked with making a two-minute video that demonstrates the errors and their impact. Each team was given a different theme from pantomime to star wars and we then viewed the videos over dinner and awarded prizes to the winning team.

# LEADING CHANGE AT SENTINEL HOUSING

The focus of day two was very much on the human side of change, so we started with our Fear Drag icebreaker where half the team are blindfolded and led (by instructions not movement) through an obstacle course by their sighted colleagues. This led to a discussion about people's fears and resistance when placed in new and strange situations and then onto the role of the manager in helping their team members through the transition process from the old to the new. To bring the challenges and skills to life in a more contextual manner, we used a range of drama sketches, where the manager, Claudia, decided to implement a 'Fit for Business Campaign'. The first sketch dealt with launching the change and Claudia making all of Kotter's first four Fatal Errors. Delegates discussed what was going wrong, gave feedback to Claudia and we then improvised a replay of the sketch and drew out the key learnings. We then looked at Building Support for Change and spent some time working through role mapping and stakeholder planning techniques for key changes in the organisation. We briefly looked at Phase 3 - Planning for Change and refreshed delegates' existing knowledge on project planning and project management

We then moved back to the human side of change and used our Wedding Reception from Hell game where delegates play guests each at a different emotional stage on the transition curve. They got to see what it feels and looks like in others and had to guess who is at which stage. After some theory on why people resist change and types of resisters, delegates watched two scenarios, which took the morning's sketch a stage further to look at how the manager handles resistance. Delegates were again asked for feedback on how the manager performed, but during the replay delegates were asked to interrupt at any point to give further guidance to the actor on how they should behave. The groups then swapped to the other scenario to see a different type of resistance.

The final session looked at managing transitions and embedding change. After some theory on ways to make the transition process less painful for employees, individually and then in small groups, delegates rated how well they and the organisation performs against this methodology. We then played the final stage in the Fit for Business story, which is several months down the line when the initial enthusiasm has started to wear off and people are going back to their old ways. In this sketch Claudia and the team are making the final four of Kotter's Fatal Errors. This time, instead of replaying the sketch, delegates are split into four groups and each allocated one character. They have to take all the learning from the two days and 'coach' their character on improving the way they personally manage change. We then got the actors to try again, so delegates could see the impact of their coaching. We rounded off the event with a Learning Review and Personal / Team Action Planning. Delegates completed their Personal Action Planning Form individual, and then in pairs discussed their learning and what else they wanted to develop. In small groups, they then looked at how they could work together to improve the way they lead / manage change at Sentinel. This led to a number of follow up activities, the Leadership Challenge questionnaire / buddying up with those who excel, carrying out a SWOT in local teams and fleshing out future potential scenarios. Feedback from the programme included

*"Thoroughly enjoyed. Number of practical sessions made it fun and fast flowing."*

*"I found time together with colleagues to explore common issues particularly useful, as well as gaining a better understanding."*

*"Very good, well packaged course on change management. Sufficient to change my approach."*

# CASE STUDY – LEADERSHIP DEVELOPMENT

## *Service Improvement / Leadership Development Programme*

*The Planning Service at Kirklees Metropolitan Council had delivered patchy performance and this was declining still further when it was taken into the council's Best in Class programme – the purpose of which was remedial. These issues went back to a historical lack of service leadership. Service Improvement and Development had not been a priority, the service had become highly reactive with no shared sense of direction, and morale within the service was very poor. In addition, many employees focussed only on their own tasks / priorities and were unable to see the impact of their actions on other parts of the Service.*

**Envisioning the Future** - At our first whole service event on 28<sup>th</sup> September 2005, it became clear that staff blamed managers for the state of the service. They blamed managers for not listening to them and were very cynical about what, if anything, the managers would be able to do to turn things around for the service. As such, we considered that simply rolling out a standard 'management development programme' made up of off-the-shelf workshops would not meet the needs of the service or its employees. Therefore, we agreed with the client to take a wider organisation development type approach designed to develop commitment and ownership at all levels:

- Looking forward and focussing on future success rather than looking backwards and focussing on the problems
- Engaging staff and connecting to the aspirations within the service for the service
- Re-invigorating the Service Improvement & Development Process and Performance Review & Development (PRD) in partnership with planning service managers

The aim of the first service-wide event was to focus all 120 employees on what future success might look like. We asked them to draw a picture that represented being 'best in class'. We then asked delegates to consider the major issues / areas for improvement that would contribute to reaching that vision. From their suggestions, we came up with 10 discussion groups, who presented back their initial ideas to the rest of the department.

Working with the management team, we refined the output of these discussions into a challenging Service Improvement & Development (SI&D) agenda for 06/07. Our 4 SI&D priorities were: **Widening Engagement and Influence; Serving the Customer; Process Improvement and Management & Leadership**. The key focus of the programme was to firstly give the service (both managers and team members) the vision of where they wanted (needed) to be as a service. Then to assist them in setting up the projects and support systems to achieve this. Finally, to assess the leadership skills required, gaps in the current team and to design development modules and activities to fill these. This two-year programme incorporated the following activities:

**Project Set Up and Control** – After creating the four key themes, each theme was assigned an owner from the senior management team and 10 priority projects (from the original list of over 30) were agreed. All managers committed to the plan and were involved (or managing) at least one of the projects. This was felt to be a key step in some of the team leaders accepting that they were 'managers'. A strategic hub and implementation forum were set up with our assistance to manage the progress of these projects – together with more local initiatives – and to ensure regular communication to all employees. The Service Improvement Programme was named 'One Service: One Agenda'

# CASE STUDY – LEADERSHIP DEVELOPMENT

**One Service: One Agenda – Making It Happen!** –a key part of this session was to roll out the Council's new PRD process and use this as a way to link all employees back to the strategic vision for the service. Top priority was to show managers how the strategy of the Council links to the service vision, then to its priorities and projects and how these can then link to individual targets and objectives in PRD. We worked closely with the Council's HR department and involved some of their specialists in presentations / discussions on the new process. The new senior management team for the Service presented on the latest plans and we ran a practical session for the managers to practice using the PRD process and forms. We also introduced them to the 360 Degree Feedback Process (see below for more detail), explained the reasons it can be helpful, how it would work and discussed any concerns delegates may have. Day 2 of the event was a skill-based session using actors to bring to life some of the issues they may encounter when 'managing appraisals.

**360 Degree Feedback Process** – we used the council's competency framework and worked with HR to agree 60 priority behaviours from the total of 144. We then designed and coordinated the 360 process for 22 managers, including the production of reports and holding 121 feedback meetings with each manager to discuss results. We ran a repeat 360 eighteen months later, which has shown major improvements in the targeted areas.

**Development Programme** – we used the output of the 360 process, together with our observations to design and deliver a range of one and two-day development modules for the management team covering: leadership, personal effectiveness, managing performance and development, culture and time/stress management and delegation

**Service Away Days** – as well as the initial Away Day at the very start of the process, we worked with the management team to develop a half-day 'update' session for all staff (which was the first time that all team leaders took part in presentations on the future of the service) and a whole day / whole service Away Day, which focussed specifically on 'Serving the Customer' and used forum theatre and discussion groups to help refine the detail behind this strategic priority

**Team Sessions** – we designed and facilitated a series of half-day sessions with every team in the department, during which they had the opportunity to discuss current priorities and changes, carry out a SWOT on their team and create a team project that could make a difference to the overall service. This resulted in the creation of over 25 local projects, which have all now been implemented. Feedback from these sessions includes:  
*"Delighted real issues have been addressed. Enjoy being involved and not sidelined. I feel that management is serious about involving people in the change. Feel committed to helping the service to improve."*

As a result of this programme and the increased skill levels of the management team, there has been a sustained increase in performance, resulting in the Service being able to take back control of its own destiny and drive their own Improvement Programme. Comments from the management team on the programme include:

*"I have learned a great deal and have become a better manager as a result. Without this programme this would not have happened."*

*"An inspiring journey which we couldn't have accomplished unaided. You made the experience interesting and fun, and challenged some old embedded ideas. Your wisdom and guidance given have been vital to get us to where we are now. "*

# CASE STUDY – MANAGEMENT DEVELOPMENT

***Adactus Housing Group provide a range of social housing across Manchester and Lancashire. The organisation has recently gone through a series of mergers and acquisitions, resulting in differing standards of management practices across the group. Following a Training Needs Analysis, Adactus identified a need for a management development programme, consisting of six one-day workshops to two groups of 15 new and experienced managers. The client particularly wanted the programme to be experiential and interactive and so awarded the programme to Pearlcatchers Ltd.***

As part of the programme design, we recommended that all delegates take part in a 360 degree feedback survey. This both acted as a baseline for measuring the success of the programme and gave the delegates invaluable insight to assist with their personal development. Overall the programme was designed to maximise the benefits of experiential and accelerated learning techniques.

## **Module 1 – Management and Leadership Today**

The purpose of this module was to both introduce them to the programme and our techniques and to explore what it means to be a manager in today's business environment. The session involved a number of discussion groups around the difference between leadership and management and the challenges facing leaders today. We used a number of games and activities to explore theory on motivation, action centred leadership and leadership styles and got each delegate to consider their own ways of working in relation to these. We then introduced them to the concept of self-development through 360 degree feedback and spent some time discussing any concerns and ensuring that everyone was happy with the process and what it would entail for them. We then set their follow up / pre-work – the preparation (in groups) of a finished up the first session by splitting delegates into teams and asking each team to put together a three-minute presentation for the next module on the challenges of managers / leaders working at Adactus today.

**Module 2 – Interpersonal Communication** - This module worked on the premise that effective communication and interpersonal are the foundation skills for any successful manager. We firstly took a little time to explore the importance of communication and some basic theory on how communication works and the impact of body language and vocal qualities on your 'total message. We then used our actors to demonstrate the message that can be given from just walking across the room towards someone without saying a word and some basic pointers about personal space and physical presence, using the concept of centering. Using a collaborative learning technique, we looked at the roles of the sender and the receiver in communication and our actors also demonstrated the difference that tone, inflection, pitch, volume and pace can have when using the same words. We then looked at email and used a physical activity to explore the issues and advantages and the dos and don'ts of using email.

The afternoon started with the presentations set the previous week. After each group presented, the trainer and actors gave them constructive feedback on their performance and added key points of theory about presentation skills. The session was concluded with a summary of key presentation tips. We then moved onto interpersonal relationships and used the actors to play out scenarios that demonstrated the potential issues when relationships are not working well. Delegates gave feedback on the issues, which then led to theory and an exercise on rapport, where we discussed rapport and observed 'rapport in action' during the discussions. We finished the day by looking at influencing – after some theory on the range of influencing styles, we got delegates to identify which style(s) they use most often. We then set them a discussion exercise during which they tried out a different style to their norm. The exercise also led to a discussion on the concept of focusing on interests not positions when negotiating.

## **Module 3 –Generating High Performance**

This module was all about performance management in its widest sense – from advertising a vacancy to interviewing, from objective setting to monitoring, reviewing and feedback and from performance evaluation to formal appraisal meetings. The concept for the majority of the day was for managers to work on roles and individuals within their team and work through the process on these real life scenarios, whilst supporting each other through discussion and feedback. We looked at some sample job descriptions and how you would advertise and interview for each role and then how you would design an induction for your team. After setting objectives, we looked at what is good and bad performance – and the importance of behaviours (how they do the job) rather than just targets (what they do) as part of objectives. We looked at how you gather information on performance and considered some of the errors we tend to make in performance evaluation (eg the horn and halo effect). Finally we moved onto appraisals, emphasising that appraisals should not hold any surprises used a video to demonstrate some of the do's and don'ts.

# CASE STUDY – MANAGEMENT DEVELOPMENT

## **Module 4 – Maintaining High Performance**

This module focussed on some of the issues that can negatively impact performance, such as change, conflict, poor performance etc. We started off looking at feedback in a bit more detail and got the actors to demonstrate using a humorous scenario. We then talked about the issues of dealing with poor performance and used scenarios to demonstrate several aspects of theory. We discussed Performance Improvement Plans and spent time considering how to manage your own reactions – by looking at beliefs, emotions and personal power with a range of techniques for remaining calm. We then looked at the issue of managing people during / through change. We examined Kotter's Eight Fatal Errors and assessed their organisation against these and also at the Square Wheels analogy when considering the manager's role during change. We played a short game to look at the different emotional stages people go through during change and the actors then demonstrated scenarios showing different types of resistance to change – and techniques for handling this.

## **Module 5 – Development and Talent Management**

This module focussed very much on developing yourself, your team members and the team overall. We looked initially at the strengths and limitations of delegates' teams and individual team members. We talked about the concept of talent management and the role of the manager in maximising this. We suggested how you recognise talent and what might make high performers (s)tick – a large part of which is development. We then moved on to how to manage development, setting development objectives, considering learning styles etc. Delegates then considered what development activities might suit each learning style. Next we moved onto self-development and gave each delegate their own 360 degree feedback report, allowing them some time to review this and make notes. We then introduced them to the GROW model of coaching and got them to work in pairs to both practice the technique and to look at their own development needs based on the feedback report. We then looked at delegation as a development technique and talked through the process for gradually handing over a task through delegation

The final session of the day looked at team development. We talked through the stages of team development and the characteristics of an effective team – getting them to assess their own team as we went through. We then looked at team roles and styles and used the analogy of animals to represent the styles that different people adopt when working in teams. We finished the day looking at team communication and briefing meetings looked at some top tips for handling these.

## **Module 6 – Handling Difficult Situations and Skills Practice**

The purpose of the final module was to bring together all they had learned so far and give additional tips and confidence in dealing with difficult situations by having the opportunity to practice with our professional actors. Again we used actors to demonstrate some of the 'difficult people' you may have to manage and we discussed theories on managing them. We also looked at potential conflict situations and demonstrated the impact of the different strategies on a specific situation.

The majority of the afternoon was spent on scenario practice with delegates split into two groups with one actor and one trainer per group. We had prepared a list of possible scenarios in advance – from a good performer whose standards have started to drop to someone resisting change, to someone accused of bullying a colleague. For each scenario, the delegate had a few minutes to prepare, time to run the scenario, then give their own feedback on how it went, get constructive feedback from their colleagues, emotional feedback from the actor (on how they felt as a result) and the trainer on theory. Where appropriate, some of the scenarios were then replayed in whole or part to embed some of the key learning points. The module was concluded with a review of the programme and giving each delegate the chance to consider the next stages of their development following the programme. Feedback from delegates was universally positive. Some of their comments are detailed below:

*"Great course, something for everyone. Some training courses can be tedious and often are not always relative, this one however was FABULOUS. It has given me confidence to move forward."*

*"Always rather sceptical about training courses but there were plenty of practical issues gone through that made it useful- not a waste of time at all!"*

*"I consider this course to be very packed with ideas and will take forward many of these in my management of the team and my interaction with customers."*

*"Training was a safe and friendly environment which aided learning and development. Actors were excellent, they made visualisation of situations very real and provided constructive feedback to people, which set people at ease when doing the role playing."*

# CASE STUDY – RESIDENT INVOLVEMENT

*Accent Peerless is part of the Accent Group, whose vision is “to support the creation of vibrant and sustainable communities by being a catalyst that enables people to improve the quality of their lives”. As such of their key improvement themes for the next three years is: “inclusion, consultation, involvement and engagement with our residents on our services and places where they live.” Accent Peerless has always encouraged feedback from their tenants and leaseholders, which has contributed towards service improvement. However, they felt that the resident involvement needed to receive more attention and detail to enable them to achieve their strategic objectives of being accountable to residents, increasing the relevance and quality of services and improving the local quality of life.*

Although Accent Peerless had previously arranged annual Residents’ Conferences, it was agreed that they needed to be more professionally organised and to thank residents for their involvement to date. There was also a strong desire to increase the number of diverse and young people involved and the historic image of ‘tea and chat in the village hall’ was not perceived to be attractive to these groups. Having previously worked with Accent Peerless on their Customer care programme, Pearlcatchers were asked to add some drama to the event by using our professional actors to perform some sketches to bring the real issues they were discussing to life.

At our initial meeting, we discussed how Pearlcatchers could provide added value, by using our actors to also facilitate some of the breakout sessions and to manage the collation of responses from the various discussions. We also suggested that when planning how to run each of the sessions, they should consider how involved they wanted residents to become, based on the following options:

- Tell – we are doing this and want to let you know
- Sell – we are doing this and would like you to see why it is necessary / beneficial
- Consult – we have some ideas and would like your input before making final decisions
- Problem Solve – we have issues and would like to involve you in coming up with a solution

Our key objective was to make the event interactive and memorable to encourage greater attendance at future events. The conference was to be closely linked to the strategic priorities of the organisation and focus on four key topics: Resident Involvement; Anti Social behaviour; Asset Management and Customer Care.

We started the day off with a short drama sketch with two residents talking about the upcoming conference, but not sure whether to go as it is bound to be a bit boring and they have other responsibilities (such as childcare). Another resident overhears and advises that Accent Peerless have decided to spice things up a bit this year and there will be all sorts of interesting things going on. They discuss a few of the sessions that will be happening, make a few humorous comments and the sketch ends with the residents now keen to attend the conference. We were very careful to make the characters engaging without impersonating or belittling residents in any way. As well as an entertaining way to start the event, this also gave delegates a taster of what would be happening throughout the day, which led well into the opening address from the Chief Executive. The opening address talked about the key objectives and strategy of the group and why resident involvement is so important to the future strategy of Accent Peerless.

The second session revolved around the new draft **Resident Involvement Strategy**, with the objectives of selling the strategy and making a public commitment to it; consulting with residents over the strategy / getting their comments and finding out what would make residents want to get more involved – and to sell it to their neighbours as well. Rather than just have another ‘standard presentation’, we set up a ‘Question Time’ panel with our facilitators as host and senior staff and actors as residents. We worked out a range of questions that would both bring out the key points of the strategy and answer the most likely ‘frequently asked questions’. As each question was being answered a slide was projected behind the panel with key bullet points. We then opened up the panel to questions from the floor. We had prepared for some of our actors to ask some key questions if the audience were initially nervous of speaking in front of such a large group – however, we were delighted when this was not required.

# CASE STUDY – RESIDENT INVOLVEMENT

We then split delegates into smaller groups, each coordinated by one of our actor / facilitators and an employee. Delegates were given a double-sided summary of the strategy and asked: What is good about the strategy? What questions do you have / is anything unclear? What is missing or don't you agree with?

Delegates then had an enjoyable hour to have a lovely lunch and the chance to view a small exhibition area with information on other key projects, as well as talk to employees about any specific issues they may be experiencing. It had been agreed during the planning stages, that there would be insufficient time to take everyone through the remaining three sessions. Therefore, after lunch, we briefly explained the topic and plan for each session and asked delegates to choose which session they would most like to attend. Those without a specific preference were then allocated between the groups to ensure more or less even numbers for each topic.

In the **Asset Management** session, the objective was to consult residents and to gather information to feed into the decent home standard. In essence, there are any number of things that could be included in the standard and although employees had some thoughts on what residents want. They didn't want to make assumptions. We started off with a short sketch discussing the inequalities between new builds (energy saving but smaller rooms) versus older properties (bigger gardens, but older doors etc...). The group was then split in half and each given various areas of the house and asked what they might want to have included. The facilitators (actors and employees) had a pick list to use if anything major was missing. They then asked the group to identify their top three items for each area of the house. This information has now fed back to the project to implement the decent home standard.

**Customer Care Strategy** – a strategy is currently being drafted – a key part of which is around the customer care strategy group of staff members. The objectives of this session was to ask residents for their input about what they might like to see included. Rather than use drama for this session, we split delegates into smaller groups and asked them a series of Appreciative Inquiries to get them focused on 'what they do want' as opposed to 'what they don't want / what is wrong currently.' These included 'what is good currently?' 'What would you most value?' and 'What do we need to do to achieve truly excellent customer care at Accent Peerless?' Delegates came up with some really great comments and suggestions that will help to shape the future strategy.

**Anti Social Behaviour** - Housing are implementing a new system and introducing case workers to make the process much easier and wanted to sell the concept to residents and ask for some input. They also wanted to clarify 'what is ASB', which we achieved by a sketch around – ASB through the ages. The sketch started with a resident complaining about a crying a baby next door and being told there was nothing the housing association could do. We then fast forward a few years and the actor becomes a little boy running and kicking his ball all over the place – still nothing can be done. Then another few years later and the boy is a teenager in a gang, playing loud music all night and threatening his neighbour – this time, there is help available. The new process was then presented and delegates were asked for their views on the process, how could it best be communicated and anything else that could be done to improve / reduce anti social behaviour. The sketch from this session caused such laughter and feedback that that delegates in the other sessions asked if we could replay it as part of the final closing session!

The Closing Session was led by the director of Housing who reflected on the key points of the day, advised what would be happening with all their inputs and how they could keep up with resident involvement. Finally, everyone was thanked for their attendance and advised that Accent peerless staff would be available for further discussion over coffee if required. Feedback from the event was extremely positive and Accent Peerless are looking forward to increased involvement both throughout the year and at next year's conference. Pearlcatchers can provide a range of services to improve Resident Involvement from the conference such as training employees who will be running resident involvement / training services.