Pearlcatchers

Inspiring Learning

# *Case Studies*
# *May 2008*

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# ***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*"

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*"

# Coachable Moments

**What exactly is 'Coachable Moments'**
These are powerful 90 minute coaching sessions which help people to practice 'difficult conversations' with an actor; giving them the confidence and expertise to prepare for future challenging situations.

The value of the sessions is that they are in private; allowing each person to explore a situation without being observed by colleagues. They can talk freely and try and make sense of an issue by practicing a past conversation that hasn't gone well, or one that is coming up. With a coach as a sounding board, they can look objectively at what they may be doing in a situation that isn't working and they can practice handling a situation in a new way.

The advantage of having an actor there is that they can offer direct feedback and offer insights from another point of view – namely, how they are feeling as a result of the conversation – what we call 'emotional feedback'. The coach can help the person to become more aware of their body language, tone of voice and choice of words can impact the conversation.

**Who would use it and when?**
Coachable Moments are popular with managers who want to get a better outcome from their staff. They can also be used by anybody who wants to resolve a conflict or improve a relationship.

It can be particularly useful when organisations are going through times of change, or when staff may feel particularly stressed and need to gain perspective in a confidential setting.

Sessions like these are essential for new managers, who may be struggling to relate to new staff, who were previously colleagues. The coaching helps managers build more trust and commitment, getting better results from their staff.

**Benefits of using Coachable Moments**

- Increased confidence and job satisfaction.
- Better, more open and trusting relationships formed.
- Ability to deal with difficult situations in a positive way.
- Awareness of how their communication impacts on others.
- Better performance from staff.

**Feedback**

- *I was really angry with one of my staff members and had jumped to the conclusion that he was being defensive and difficult when I asked him to do things. In my coaching session, I learnt that his behaviour was defensive because he was terrified of losing his job. I had never considered it that way before. When I finally had the conversation with him, I was relaxed and really wanted to understand his point of view. He completely opened up to me, and we have a much more trusting relationship now. He's now so much more helpful and relaxed in his job.'*

# Coachable Moments Case Study

**The Situation**: The IT Manager of a well-known bank was new to the organisation and was brought in to develop and support new recruits, as well as to build a credible information database for the department. He was anxious to impress his staff and the senior management team and was having difficulty gaining the respect of people in the team. He wanted to gain a promotion and to improve his relationship with his manager, who didn't treat him with respect.

**The Process**: Nicky held two sessions with this manager. In the first session, they spent the first twenty minutes talking about his experiences since he'd arrived at the company. It turned out that he had a much more senior position in another company and was feeling frustrated by the level of authority that he had in his new role. He also felt undermined by his manager, who didn't seem to give him any quality time. He felt that he was trying hard to impress, but nothing seemed to be working.

Even before we undertook any practice, the IT manager began to realise that it was partly his frustration that was making it difficult for him to relate to his manager. He recognised that he needed to curb his frustration and deal with the needs of his current role.

In the next stage, we set up a situation where the actor became his manager and he practiced a meeting, where he wanted to ask about promotional opportunities. Initially, the IT manager entered the meeting by speaking at a fast pace. He came across as nervous, impatient and some of his language was already self defeating, using phrases such as 'I don't suppose there are any opportunities, but'…

After gaining feedback from the actor and coach, the manager recognised that he was anxious and his behaviour showed that he wasn't in control of the meeting. He tried again and consciously slowed his communication down and gave the manager a chance to talk. He also adapted his body language, so that he was more centred and neutral.

**The Outcomes**: Initially, the IT manager said that he felt a huge sense of relief for being able to talk openly and confidentially about some of the anxieties that he had experienced. After the session, he reported that instead of heading straight to try and gain a promotion, he decided to try and get to know his line manager. His manager ended up revealing that he himself was having difficulties with his position with the department and did not know what the future was going to be.

The IT manager was able to have much more open conversations from then on, because he had built bridges and wasn't so anxious about his own position. Because he was more relaxed, he was also more confident and calm when dealing with his own staff. He was able to allow them to talk openly to him and he had a much more 'conversational' style of management, instead of it being a 'tell' approach.

*'This was one of the most useful experiences I have ever had. It has completely transformed the way I relate to my staff. I didn't realise how aggressively I can come across when I'm under pressure and that I didn't listen properly. Now I am much calmer when I need to give feedback, I'm able to listen to their point of view and less obsessed with getting things done my way.'*

# Coaching the Coach

**What exactly is "Coaching the Coach"?**
Coaching the coach is a practical guide to help managers learn and practice putting coaching skills into use in their day-to-day management style, or within official feedback sessions. It can be a one or two day event, depending on the requirements and can offer valuable insights to help managers to get more commitment and better performance from their staff.

Although there are plenty of 'coaching courses' on the market, this course has a more 'practical' focus, because it incorporates scenarios with professional actors, to help people relate and connect with 'how not to do it', and practice 'how to'. Ideally the event would be designed specifically to the culture of the company and we would create scenarios based on 'realistic situations' showing 'manager/ subordinate interactions' in the company.

During the course, we'll uncover what coaching is, its principles, techniques and benefits. The main focus of the course will be to revisit the scenarios and to help managers to practice using the coaching principles into running a meeting with an under-performing staff member.

There will be feedback and opportunities to try out different styles with various types of staff members, so that delegates can recognise that coaching is not a 'one size fits all' approach. If required, delegates can be further supported with individual 'Coachable Moments' sessions back in the workplace.

**Who would use it and when?**
The sessions are designed for people-managers or people hoping to move into management positions. It can be used to help managers get more commitment and output from their staff, improve their communication skills and to put management theory into practice. The day also enables participants to bring in their own 'situations', which they will be able to practice on the event.

**Benefits of Coaching the Coach**

- Understanding of the benefits of coaching
- Real experience of using coaching skills in their role
- Awareness of their own management style
- The ability to respond and understand their staff's needs
- The confidence to use coaching within their day-to-day management
- More motivation and commitment from their staff members

**Feedback**
*' I knew what coaching was, because I had received coaching as part of my job, but this course showed me the difference between the theory and what it was like to do it. It does feel unnatural at first, as I'm so used to coming up with solutions for my staff, but now it's becoming second nature, and I'm noticing a massive difference in the confidence levels of my staff. They tend to come to me now with ideas first, instead of just coming up with the issues'.*

# Coaching the Coach Case Study

**The Situation**
The client was a manager at a mortgage brokers call centre. She was very organised and efficient and a good problem solver. She tended to 'rescue' her staff whenever they were unsure of what to do. The difficulty was that they never seemed to be able to come up with their own solutions.

The manager wanted some help to try and empower her staff more. She had done some coaching training before, but had found that back in the pressures of the contact centre, she would tend to go into 'proactive mode' again and found it hard to put her skills into practice. She wanted to know how she could include coaching in her day-to-day management style.

**The Process**
During the diagnostic phase, several observations were made of the contact centre and it was clear that it was a high-pressured environment, where issues arose constantly. Scenarios were written to reflect the contact centre and to show how the managers would tend to go into 'reactive' mode whenever a staff member approached them.

During the training day, managers were able to observe the situation objectively and recognised that their 'solution-focused' approach may help the situation immediately, but tended to keep their staff relying on the managers' expertise, instead of using on their own initiative.

We explored coaching techniques throughout the morning and we then re-ran the scenarios where they took the part of the manager and practiced using a 'coaching style' to help their staff use their own initiative.

**The Outcomes**

- The managers were delighted to understand the point where they can use coaching in their jobs. They also recognised that they needed to adapt their style to suit different types of staff members.
- After the training day, the managers pointed out that they had to consciously use coaching as part of their role, but that over time, it had become more second nature.
- The result has been that the staff have taken more responsibility and they tend to deal with disgruntled customers themselves, instead of always referring to the manager.

*' I knew what coaching was, because I had received coaching as part of my job, but this course showed me the difference between the theory and what it was like to do it. It does feel unnatural at first, as I'm so used to coming up with solutions for my staff, but now it's becoming second nature, and I'm noticing a massive difference in the confidence levels of my staff. They tend to come to me now with ideas first, instead of just coming up with the issues'.*

# 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.

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 – 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 1st 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?"

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 hat 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"

# 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.

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 are 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 – 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.

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.

# *Case Study 1: Management Development at Adactus Housing*

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 inished 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.
***Case Study 1 contd … /***

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.

**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 of 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.

***Case Study 1 contd … /***

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 2 –Kirklees Planning Service*
## *Service Improvement / Leadership Development Programme*

Case Study 5 - Kirklees Metropolitan Council – Service Improvement / Leadership Development

This case study demonstrates our ability to work over a long period with an organisation to create lasting change, using a range of methodologies from whole department away days to 360 degree feedback to tailored development modules. The Planning Service 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. The purpose of this intervention was to improve a 'struggling' service by helping them to develop a service improvement plan and to develop the leadership skills to carry it through.

This programme was delivered by one of our associates Peter Lodemore, together with Sharon Young. 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 to fill these. This two-year programme incorporated the following activities:

Service Away Days – following initial research, the first activity was a service-wide event was to focus all 120 employees on what future success might look like. This was followed by update sessions throughout the period and an away day focussed specifically on 'Serving the Customer'

Visioning / Project Set Up - We took their suggestions and worked with the management team to refine these into four key themes: Widening Engagement and Influence; Serving the Customer; Process Improvement and Management & Leadership. 10 priority projects were identified and project managers assigned. A strategic hub and implementation forum have been 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

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: appraisal training, leadership, personal effectiveness, managing performance and development, culture and time/stress management and delegation

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

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.

**The Challenge**

Pearlcatchers were appointed to deliver the Management and Leadership Development Programme (M&LDP) in partnership with the Kirklees Planning Service in the summer of 2005. The M&LDP is part of a wider investment in the Kirklees Planning Service, linked to the Best in Class programme of projects. The context for the Best in Class programme, and M&LDP, was remedial – put in place because of the Service's patchy performance over previous years and the declining status of the Planning Service within Kirklees.

These issues went back to an historical lack of service leadership. The previous permanent Head of Service had been suffering ill-health over a number of years, and was eventually retired in 2005. 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.

At our first whole service event on 28th 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 and development (SI&D) process & Performance Review & Development (PRD )in partnership with planning service managers

**Envisioning Service Improvement**

The focus 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***
- ***Management & Leadership***

***Case Study 2 contd… /***

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 are committed to the plan and are involved (or managing) at least one of the projects. A strategic hub and implementation forum have been 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

**Management and Leadership Development Programme**

In terms of the M&LDP, our agreed mission for Management Leadership was:

*Providing Dynamic, Effective & Consistent Service Leadership*

This is a reflection of feedback from the staff and recognition that there were some very effective and some very ineffective managers in the service – this resulted in major inconsistencies in how people were managed.

Our first two tasks, therefore, were to assess skill levels against the corporate competencies and to provide training and support around the implementation of a new Performance Review & Development process to ensure consistency across the service. These two areas formed the basis of the two-day event that launched the development side of the programme

**One Service, One Agenda: Making it Happen - Skills Review and PRD Training**

The skills review related to a 360 degree feedback process that we designed and managed in consultation with the central HR service for the council. A new competency framework had been designed with key competencies and behaviours for different levels in the organisation. We worked with HR and the service senior managers to identify which of the behaviours were of critical importance in terms of both meeting corporate standards and enabling them to achieve the challenging service improvement agenda.

From the total 144 behaviours in the framework, we agreed the priority 60 and designed a questionnaire for colleagues to rate the managers across 5 gradings from 'not effective' to 'area of excellence'. There were also additional open questions allowing for free text. As this kind of process was completely new to the vast majority of managers we spent considerable time preparing support material and included a session on the two-day event on how to make the most of the process

In terms of PRD training, we again worked with HR to understand the new documentation and to prepare training activities that included input and presentations from HR representatives. A key 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. The format for the two days is detailed overleaf:

***Case Study 2 contd… /***

**Day 1 – Creating the Environment**

- *Introduction and icebreaker*
- *Briefing on 06/07 priorities / Service Development Plan*
- *Making the Most of Your 360 Process*
- *Getting the Best from the 06/07 PRD process*
    - The link between PEAK and PRDs
    - Making the link with 06/07 priorities
    - The manager's role in PRDs
    - Working through the PRD /appraisal process – this interactive session involved each manager utilising a workbook, based on the PRD forms with key tips, to work through each stage of the PRD considering one of their team members

**Day 2 – Skills Development for Managing Appraisals**

As day 1 was focussed on understanding the environment and process for PRDs, day 2 was focussed on the skills needed for 'managing the conversation'. The basic format was quite similar to that used in Case Study 1 (Rockwell Automation), where we introduced the topic, used forum drama to both get them used to drama-based learning and to draw out some of the key skills required to effectively manage the appraisal meeting.

The main difference came at the end of the morning, where we first asked each manager to spend some time individually considering the needs and issues for their own team's PRDs. We then split them into two groups, gave them a set of scenarios that were based on some of their pre-work about current issues and asked them to decide which scenarios they wanted to focus on in the afternoon and which manager would volunteer for each scenario.

We allowed 2.5 hours for the role playing, which allowed each scenario to be run twice with feedback in between. The day was concluded with a learning review and individual action planning.

As a result of this training, together with a monitoring process that the service implemented, they were one of the first services in the council to be able to show that all PRD meetings had been held and all forms completed. They were highlighted as a high performing service in this regard. Although there was still work to be done in terms of the quality of some aspects of individual PRDs (eg dealing with employee development), this was a huge step in the right direction

**360 Feedback Process**

Each manager was given 7 questionnaires: 1 for self assessment, 1 for their manager; 2 peers and 3 direct reports. To ensure confidentiality, all completed questionnaires were sent directly to Pearlcatchers who collated the results and produced an individual report for each manager showing their performance both in all 60 behaviours and the 8 high level corporate competencies.

***Case Study 2 contd… /***

121 feedback meetings were arranged with each manager and one of our consultants. Each manager was given their report one hour prior to the meeting, so they had time to review, but not too much time to dwell on any 'problem areas'. Until now, the focus of the programme had been fairly generic, so this was the first time that managers were asked to talk about themselves and their development areas – which was quite a challenge for some of them. We talked through their initial reactions and then in detail through each competency, questioning why they might have received those ratings

We then asked them to consider what they could do to utilise their strengths and improve their development areas. We advised them to talk through their output with their line managers and to summarise the key points ready for our next full-group session the following month when we would launch 'Project Me'. The premise of Project Me is that a lot of focus had been given to the various priority improvement projects across the service. Project Me was our way of ensuring that each manager was also giving focus and time to their own development needs.

**Planning the Development Programme**
In addition to the individual reports, we prepared a summary report for the senior team, which incorporated the scores and consultant commentary based upon the free text and our observations from the 121 feedback meetings. We identified that the stronger areas of competence relate more to the day to day management of the service, and the weaker areas relate more to service development.

We felt that the challenges that were facing the service, especially the need to lead service improvements and change, would expose the management's weaker areas of competence. This was an area of concern and a target for support and development through the programme. As part of this summary report, we detailed those areas that we felt required priority in terms of the skills development aspect of the programme. We felt that there was a need to balance some individual development with some key leadership skills, so the priority areas were:

- Leading change
- Personal effectiveness (emotional intelligence)
- Managing and developing people
- Customer Focus
- Understanding and managing culture

We recognized that there were also development needs around:

- Project management
- Time management and delegation
- Managing stress
- Dealing with difficult people (particularly during change)

Although there were varying levels of experience across the service, we did not recommend that we divides the group during the M&LDP. Apart from cost considerations, we believed there was a need to build the management team and we needed to establish a baseline foundation of competence across all 8 competency areas for each manager.
***Case Study 2 contd… /***

The overall aims of the development programme were:

- ***Consistency***: to improve consistency around people management through the introduction of frameworks and tools
- ***Effectiveness***: to improve the effectiveness of individual managers & their teams through learning, skill development & coaching
- ***Dynamic***: To improve the Service's ability to manage change through relationship building, SID planning, and project management

To make best use of available resources, it was decided that the project management course would be run by an internal trainer at the council, who was familiar with their project methodology. In addition, we decided that customer focus was much better handled as a cross-service event, as there was a need to get all employees sharing the same vision in relation to customer care. The remaining topics were handled through the core M&LDP. Every workshop was preceded with some reading /questions and followed up by a work based activity

**Leadership, Personal Effectiveness and Project Me**

We agreed that this event needed to be two consecutive days to really embed some of the key development areas.

**Day 1 - Understanding Leadership and what this means for you and the Service:**

- The business of leadership; getting from vision into action; transformational change v continuous improvement; Management v Leadership; our revised 06/07 Service Improvement and Development (SID) plan; understanding our roles as managers and leaders in practice
- Why efforts to create change often fail; an 8 step model for creating major and lasting service-wide changes; using the 8 step model to evaluate our progress with the 06/07 Service Development process and to plan our next steps;

**Day 2 - Project 'ME': getting into personal development using your 360 feedback, and taking responsibility for improving your personal effectiveness as leaders and managers:**

- Emotional Intelligence as a framework for personal effectiveness and leadership development. Why you need to understand yourself and your interactions with others before you can become an effective leader
    - Improving self awareness (our strengths, weaknesses, beliefs etc)
    - Improving self management (understanding how we can sabotage our selves, especially under pressure, and becoming more resourceful and adaptable)
    - Understanding motivation (and what turns us and others on and off)
    - Developing our social awareness (improving empathy, recognising others' needs and our impact on them)
    - Developing our social skills (managing relationships, communicating for commitment, and interpersonal effectiveness)
- Using the 360 feedback to identify strengths and areas for improvement and starting to create personal development plans and developmental relationships to support our journey as learners, leaders and as a team

***<u>Case Study 2 contd… /</u>***

**Managing and Developing People**

The tagline for the next workshop was:

***"Managing and developing individuals to maximize their contribution to service delivery"***

This area was seen as one of the most important for both managers and staff – with poor management being cited as a key cause of discontent by staff, and has been regularly criticised over recent years by external reviewers & assessors. Although significant progress had been made in implementing PRDs, we felt that all the good work would be unlikely to produce the results we were looking for without significant improvements in the effectiveness of day to day line management, communication, and staff attitudes.

As this was such a key topic, we again kept to the two-day workshop format. This enabled us to get into sufficient depth and detail on these key areas.

- **One to one Supervision & Team Meetings**
    - Committing to a consistent standard of management practice across all teams in terms of regularity of one to one's and team meetings – we agreed a 'People Charter' in terms of supervisory practices
    - Improving skills and success in running one to ones and team meetings
    - Understanding motivation – what brings out the best and worst in people – and treating different people differently
    - Understanding your preferred management style and learning how to adapt it to different staff and different situations
    - Maximising your day to day opportunities with staff to get things done and build future capacity in individuals and teams
    - Running effective team meetings and keeping connected as a service through team briefing
    - Listening, giving feedback and handling people we find difficult or defensive

- **Coaching and developing individuals for continuous improvement**
    - Learn a powerful technique for empowering staff and colleagues to maximise their ownership, commitment and success with service improvements
    - Learn to apply the coaching model and practice with your fellow managers in helping them with the practical challenges they face and 'Project Me'

Some of the theories we covered in this workshop includes Action Centred Leadership, Situational Leadership / Leadership Styles and the GROW model for coaching. We enabled delegates to practice this technique by coaching each other on their Project Me prioirities.

***Case Study23 contd… /***

**Managing Culture**
Culture had been seen as a major issue in the service, so this workshop focussed on increasing the managers' understanding of what makes culture and how you can change it

- Getting to Grips with Culture – we discussed what we mean by culture and introduced them to the Cultural Web framework and methodology
- Defining Current KPS Culture – we then used the cultural web to define the culture that exists currently in the organisation – the unwritten rules and beliefs that dictate how things happen
- Exploring Culture Change Possibilities – following input from colleagues and senior managers about the future, delegates looked at what is required from the service in future and the ideal culture to support this
- Identifying Gaps and Action Planning – finally the group compared the 'as is' with the desired culture and identified what things need to be stopped, started, continued or changed to move to where they want / need to be

**Customer Focus**
As detailed above, we ran a second service-wide away day with the focus on Serving the Customer (one of the key priorities). The morning focussed on external customers, using a number of interactive sessions, including forum theatre and looking at customer values to identify key areas for improvement. The output from these sessions have been fed into the new customer care strategy. In the afternoon, the focus was more on internal customers and on improving relationships between the different teams in the service

**End of Year Review**
At the end of December, we ran a half-day session for the managers to review progress to date and consider the priorities for the coming year. As well as identifying some outstanding skills development, there was a desire for more 'devolved clienting' by helping managers work directly with their teams. As a result we spent considerable time in February / March of this year working on team sessions (see below)

**Team Sessions**
We felt that one of the weaknesses with our initial approach is that we were only engaging staff on a whole service basis. This did not bring out the best in them and it sometimes diffused responsibility. It was important that we continued to use whole service approaches , but we recognised that this was not helping managers with their specific team issues.

We therefore planned and facilitated a series of half-day 'away days' with each and every team in the service (14 in total). The purpose of these sessions was to connect all teams and individuals with the wider service improvement agenda. There were four main activities during these sessions:

- Introduction, objectives and an explanation (using the square wheels methodology) to the concept of continuous improvement
- Team SWOT – each team was given 15 minutes to look quickly at their strengths, weaknesses, opportunities and threats and then present this back

***Case Study 2 contd… /***

- Presentation from Senior Managers – this presentation explained the top 10 strategic priorities / projects in the coming year and explained how change will be managed. The session was quite interactive allowing for questions from teams
- Action Planning – looking at their SWOT and considering the presentation, teams were then asked to come up with local projects that they felt could make a difference to the service (100 things that each make 1% difference). They were then given approximately 30 minutes to plan what they could do, assign an owner and initial timescales.

These sessions produced huge amounts of creativity and teamworking (across as well as within teams) and in excess of 25 local projects. Feedback from delegates includes:

- Delighted real issues have been addressed. Enjoy being involved and not sidelined
- More enthusiasm from participants than ever before. Things look as though they are moving at last with real and achievable goals.
- Yes, a good half day session. Better than I thought it would be - feel's different because Management were convincing and involved.
- I was fairly sceptical about today and felt that it might be a lot of talking and not much doing. However, it has been a productive afternoon and I feel that our thoughts and concerns are being addressed and I expect there to be improvements.
- Excellent. I feel that management is serious about involving people in the change.
- Feel committed to helping the service to improve. More positive. Good ideas came out of the session. Things are eventually beginning to happen.
- Positive vibe – good team spirit. Feeling that improvements are practical and therefore ultimately achievable

**The Future**

We are currently working with the managers to support the implementation of their local team plans following the sessions. We are also planning two more development modules to focus on the outstanding topics of Time Management and Delegation and Dealing with Difficult people – the latter will be a two-day session involving practical role plays with actors to explore specific issues

In addition, we are working with some individual managers on Unblocking (helping with the 'stuck' issues) in their teams, using coaching sessions with consultants and their line managers. These activities will form part of our 'exit strategy' from this client enabling them to effectively manage the service without support by September 2007.

Planning Managers have already started to deliver against their mission through the M&LDP - using the PRD process to cascade service-wide priorities to staff, and in putting themselves through a rigorous 360 feedback assessment process. 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 SI&D Programme. The final stages of this programme will focus on ensuring that the service have the processes, structure, people and skills to deliver results against both operational targets and their strategic priorities on an ongoing basis. This will require a more tailored / individual approach depending on the needs of the different teams / managers.

## *Case Study 3 – IDIS Pharmaceutical*
## *Two-day Negotiation Skills Workshop*

IDIS are a pharmaceutical organisation that deal internationally with suppliers and clients. They wanted to run an interactive workshop on negotiation skills for between 10-15 delegates. The delegates were from two teams both negotiating with different groups. One team is involved in client negotiation, the other dealing with suppliers and procurement. A secondary objective was to incorporate some kind of teambuilding between the two teams to help them work together better in the future. The client was very keen that the workshop should be interactive including practical exercises and last for 1.5 – 2 days.

### The Format

Based on this brief and detailed discussions with the client, we designed a two day programme. Day 1 focussed mostly on the theory of negotiation, but used a wide range of interactive exercises and games to both draw out and embed learning. Day 2, which was held two days later, was almost entirely practical.

The morning was spent producing a video with the title 'The Perfect Negotiation', which incorporated the teambuilding aspect. The afternoon was spent on group and individual role plays. To maximise learning, the programme also incorporated some pre-work and a follow-up event after 3 months.

### Pre-work

The pre-work was sent out a week in advance of the workshop to both get delegates thinking about the topic and help the trainer to pitch the day at the right level for the experience / objectives of the delegates. Firstly we asked them some questions about negotiation:

- How much experience do you have in negotiation?
- What are your objectives in attending this workshop?
- How would you define negotiation and how does it differ from influencing
- What would you say are the key steps to a successful negotiation / How do you approach negotiations?
- What skills do you think excellent negotiators need to possess
- What aspects of negotiation are you most comfortable with
- What aspects of negotiation do you find most difficult (would you like to receive some development on)
- Think of a difficult situation / person you have encountered (either in the past, currently or which you anticipate might happen in the future) when negotiating :
    - What was the situation
    - Who was involved (what was the other person like)
    - What was your objective
    - Why was it difficult

Secondly, we asked them to consider a challenging negotiation situation they have experienced / are about to experience and to provide details of this on the form

**Case Study 3 contd … /**

**Agenda for two-day workshop**

**Day 1**

09.30 Arrival / Registration
10.00 Introductions / Objectives
10.15 Introducing the Topic – Negotiation is … followed by discussion
10.30 The Process of and Skills Negotiation – flipchart discussion
11.15 The link between influencing and negotiation
- Influencing and negotiation styles – push and pull strategies
- Identification of your own and others preferred influencing styles
- Individual exercise to draw personal influencing map

12.00 Negotiation stances – hard, soft or principled
- Introduction to Principled Negotiation
- The Ugli Orange Negotiating Exercise – in pairs

12.45 Lunch

13.15 Developing the skills of principled negotiation
- Separate the People from the Problem
- Focus on interests not positions
- Cave Rescue exercise using influencing styles and interests
- Invent options for mutual gain
- Insist on objective criteria
- Developing your BATNA (Best Alternative to Negotiated Agreement)

14.30 Break
14.45 Hospital Funding Group Exercise to practice principled negotiation
15.15 When the going gets tough
- Negotiation Jujitsu
- Moving through stalemates – change the size of the pie
- Dealing with Tough Tactics

15.30 Review of learning, action planning and set task for day 2
16.00 Depart

**Day 2**

9.30 Arrival / refreshments
10.00 Review of Day 1
10.30 Lights Camera Action (teambuilding video production)
11.45 View video(s) and final debrief on learning so far
12.15 Set afternoon content (choose role plays)
12.30 Lunch
13.15 Role playing activities (121s)
14.30 Break
14.45 Resume role plays
16.00 Review of learning and action planning
16.30 Depart

**Case Study 3 contd … /**

**Day 1 – Understanding / Learning the Skills and Process**
The purpose of day 1 was to give delegates a sound theoretical grounding in the negotiation process and key skills. However, as people learn best by doing, day 1 still included a range of exercises (both individual and group) and discussions to accelerate the learning process.

***Session 1 – Introducing the Topic***
This first session had two main objectives. Firstly, to relax and engage the delegates and secondly to introduce the concept that good negotiations are about more than just 'going through the process'. The session started with a short ice-breaker. The delegates were split into two or three groups and given an envelope with various phrases. They worked together to come up with sentences that begin 'Negotiation is …' – and decide which they think are true or false. The outputs were discussed and lead into the first discussion about negotiating generally and how it fits into the overall sales process. This again linked back to the pre-work and incorporated a degree of theory

***Session 2 – The Process of Negotiation and Key Skills***
The first part of the session focussed on the process and preparation for negotiation and include theory on the different skills required by excellent negotiators. We also spent some time looking at influencing as a key skill within negotiating and showed delegates a range of styles from passive to aggressive. We asked them to consider which were their preferred styles and got them to try out activities using different styles.

The morning was completed with an exercise called the Ugli Orange, where delegates had to negotiate in pairs. We used the discussion following this exercise as an introduction to the basics of Principled Negotiation.

After lunch, the majority of the afternoon was spent learning and practicing the skills of principled negotiation. There were individual, paired and group exercises at regular intervals to both accelerate / embed learning

***Session 3 – Review of Day 1***
The day was concluded with a session where each delegate looked at what they had learned so far and started to think what areas they may need to concentrate on in day 2's practical sessions. At this point we also set the task for the morning of day 2 to allow the team(s) some time to discuss / prepare in advance of the event.

**Day 2 – Practical Application of the Skills / Learning**
The purpose of day 2 was that having had a little time to 'sink in' we could really see how much had been learned, fill any remaining gaps and give delegates the chance to practice their new skills in a safe environment

***Session 1 - Review of Day 1***
This short session reminded everyone of what was learned on day 1 and to gave the opportunity to ask any questions / answer any outstanding queries about any of what has been covered to date. We also asked delegates what areas they most wanted / needed to practice in their role plays. We then worked out tailored scenarios for each delegate while they completed the next task (see overleaf)

**Case Study 3 contd … /**

***Session 2 – Lights Camera Action***
This session was based around our popular team-building activity, but tailored to incorporate both team development and embedding of the knowledge learned on day 1. At the end of Day 1, delegates had been set a task to make a 5 minute video entitled 'The Perfect Negotiation'.

Armed with a video camera, themed costumes/props, an idea for a script and of course a clapper board, the teams were then let loose to record their own video masterpiece. The teams had to design, cast and act out their video – ready for the trainers to watch and review. Our actors would help to facilitate this session, which also included some short team challenges which would entitle them to additional supplies, such as better props, technical advice etc

***Session 3 - Applying the skills / learning to 'real life situations'***
The afternoon was dedicated to role play sessions – all of which were videoed. The first activity of the afternoon was a group negotiation role play. The trainer and both actors played members of a management team. The delegates were staff representatives who had asked to meet the managers to discuss a proposed office relocation. This exercise both helped them to practice group negotiation and relaxed them into the concept of using actors prior to their individual sessions

The group was then split into two, each half with one trainer and one actor. In turn, each person was given their tailored scenario and had a couple of minutes to discuss with their colleagues and plan. We then played the role play until a suitable time to stop. Delegates were given feedback from the colleagues (on process), the trainer (on theory) and the actor (emotional feedback) and coached as to how they might improve. They were then given a chance to replay the scene taking the feedback into account. There was then a very short second feedback session before we moved onto the next delegate, until everyone had had a chance to practice

***Session 4 – Wash Up and Action Planning***
The day was concluded with a session where each delegate looks at what they have learned so far, what gaps they have in their knowledge and what actions they are going to take both to utilise their new skills and to fill the gaps that remain. This took the form of some personal thinking time, followed by a group discussion on what they have learned / how well we have met their objectives. We finished the workshop with a short evaluation form, which elicited the following comments from delegates

- Very good course: enjoyed the interactive stages of the course. I learnt to overcome my fears
- One of the best courses I have taken part in. Really enjoyed the practical sessions
- Brilliant and also realistic.
- Excellent course – just the right length as well
- Everything was really well thought out and well organised
- Fantastic, best two days spent

**Case Study 3 contd … /**

**Day 3 – Follow up / Refresher**
The purpose of these half-day sessions was to check how much learning had been absorbed, refresh any 'grey areas' and to focus in a little more on the specific needs of the individual. To again get delegates thinking about the topic, we sent them a questionnaire one week prior to the event, asking them to think back to the workshop in September (referring to their workbook if necessary), then consider how they have used what they learned since returning to the workplace

- What aspect(s) have you found most useful and why?
- How have you changed the way you approach negotiations?
- What difference has this made to your negotiations?
- What have you found most difficult (either to use or understand) and why?
- Have you been involved in any successful negotiations since the workshop?
- What did you do (differently)?
- Have you been involved in any negotiations that have been disappointing?
- What were the problem areas?

We also sent them all a copy of the DVD with their own role play and advised that as part of the review session, each of them would have 15 minutes to focus on the area(s) they would most like to develop further. In preparation for that session, we asked them to watch the entirety of their session (both pre and post feedback). We then requested that they paid particular attention to the 'micro-skills' such as body language, eye contact, tone of voice etc. Thinking about this and their answers to the questions, we suggested they made some notes about what area they wanted to discuss on the day and found a section of the DVD that demonstrated the issue they wanted to discuss

**Session 1 – Icebreaker / Refresher**
We used a similar icebreaker to the original workshop, where they had to construct sentences. However, the start of the sentence was "Effective negotiation …" and the phrases related to all the key learning points we had covered previously. We used this exercise as a springboard to review all the key aspects of principled negotiation, influencing etc.

**Session 2 – Personal Air Time**
In this session, each delegate had 15-20 minutes to focus on their personal issues. They each explained the issue, showed some video footage to demonstrate and then both the trainer and their colleagues provided support, challenge and suggestions in a coaching type environment.

The topics covered in this session included lack of self esteem, body language (seeming aggressive by nature of their physicality), using different influencing styles, coping when things go wrong, keeping control of your emotions when someone pushes your 'hot buttons' etc

As well as providing support and basic theory on the day, I supplemented this session by supplying additional resource material for delegates after the event, that related to the key areas we discussed.

**Case Study 3 contd … /**

*Session 3 – Open Workshop*
This final 45 minute session was left open to cover any of the macro areas that delegates might want to focus. The trainer gave a few suggestions and on both sessions, the delegates opted for an excerpt from our Voice & Body workshop. This focussed on using your voice and body as effective tools in communication and negotiation. The excerpt focussed specifically on the impression that you can give simply by walking across a room, shaking someone's hand and saying hello. This session was very interactive, with delegates on their feet for almost the entire time

*Session 4 – Review of Learning / Action Planning*
The final exercise of the day, was again to review learning and individual progress and to consider what further development each individual might need.

During this session, we also asked for further feedback on their continued development and received the following comments:

- Opened my eyes to a lot of interesting habits that I naturally adopt and don't know realise I am doing.
- All of today has been helpful - the videos and constructive criticism that everyone gave. The physical exercises help to put the theory into practice.
- Watching my feedback was very useful – valuable aspects of how I am/what I need to change and be mindful
- Very insightful – great that I have very specific feedback to me as an individual
- Enjoyable and informative
- Session bought new issues in to focus

IDIS have recently carried out a review of all training course (both internal and external) run during the past 12 months. This programme has been universally seen as head and shoulders above anything else. As such, they are in the process of putting it forward for the National Training Awards.

# ***Case Study 4 – Culture Change at Staffordshire Libraries***

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 have been huge physical, process and cultural changes within the service recently, 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 to be the new ways of working that will enable the library service to create memorable customer experiences, such as:

- 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.

Along with an introduction and close, the video was split into four main sections, each of which related to one of the key priorities that had been set for the service: access, environment, stock and marketing. As well as background reading and planning the assignment involved visiting a number of libraries around the region, each of whom had interesting developments to report on. Whilst there, we filmed the environment, 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. Delegates were split into groups and given an envelope containing various phrases that, when assembled, provide seven possible definitions of service. The teams were then asked to read out their definitions and asked how they would relate to customer care in their own organisation

***Case Study 4 contd … /***

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.

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' that 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. We are still in contact with Staffordshire Library Services about future training requirements for customer care, communication skills, assertiveness and influencing

# *Case Study 5 – Customer Care Culture at Willow Park Housing Trust*

***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?

***Case Study 5 contd … /***

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 that 'customer type'. This session resulted in some excellent suggestions, which are now being investigated by the client as to their feasibility.

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.
***Case Study 5 contd … /***

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"***

***"Very novel, different and well run. I felt included throughout"***

# ***Case Study 4 – Managing Performance at Rockwell***

This is a one-day event that I designed to meet the specific needs of this client who has a well-established appraisal process that is operated by their line managers. Until recently training in this area has been focussed mostly on how to manage the appraisal process. They wanted to take the development 'to the next level' and to focus on the soft skills, such as communication, listening, questioning etc that will result in far better appraisals for both the employees and managers. Having seen our drama-based learning at an open event, they asked us to design a day around actors and practical exercises. They were also keen to be able to measure the success of the programme and so we agreed a pre / post event questionnaire.

Initial training was run in September 2004 and was so successful that we are now working with them on more specialised / in-depth training during 2005 and 2006 to involve 2-3 day training courses operating a detailed business simulation, which will follow an 'employee's' progress over a period of time. Below is a summary of the course format, which details how the session was run

**Pre-Work**
There were two main aspects to the pre-work. Firstly, a few questions to get the delegates to start thinking about the topic and training in advance, such as "What do you understand by the term 'managing performance' and "What aspects of managing performance do you find most difficult". Secondly, a short questionnaire to help ascertain the skill levels of the delegates. This helped us both in pitching the event at the right level / aspects and forming a baseline from which to measure improvement as a result of the training. The questionnaire focussed on both the skills and the practical implementation of managing performance

The delegates completed a self assessment and also asked their manager and 2-3 members of their team to give a rounded view. We then prepared a summary report for each delegate which was handed out on the day of the workshop.

**Introducing the Topic**
We asked the question "What is performance management" and solicited responses from the delegates. Through open discussion, weclarified that PM is not just about appraisals, it is also about : Setting objectives; Ongoing monitoring and evaluation; Regular reviews and 121s; Recognising development needs and opportunities; 'managing' development activities; Dealing with performance issues; Managing high performers; Reward and recognition; Formal appraisal processes

We then widened the discussion to ask what skills do you need to effectively manage performance. This incorporated a little theory on the iceberg methodology and emphasised that effective performance management is about the way in which **you** deal with the person, not just filling in the forms

**Understanding / Learning / Practising the Skills**
In advance of the workshop, we prepared a series of scenarios that deal with the various skills necessary for managing performance, such as Active Listening; Questioning to gain information (open and closed questions); Summarising to check your understanding; Body

language; Giving feedback; Using the right language and understanding other's points of view.

## *Case Study 4 contd … /*

The focus was very much on managing the interaction – not the process. The scenarios in this situation are humorous and fictional and involve both actors (known as forum drama). Delegates observe the scenario (usually portrayed as a 'how not to'), then give feedback on what went wrong and provide suggestions for improvement. The actors then replay the scenario, taking the advice on board and delegates to see first hand the difference that a few slight changes can make to the situation – and the outcome.

This format works well because whilst it relates strongly to managing performance (or aspects of the topic), it is not instantly linked with your organisation. Delegates then feel more free to comment and it is the discussions / debrief of the session that links what they have already agreed is the 'right approach' to how this would be applied in their workplace. The session was concluded with a debrief session, to re-emphasise and embed the learning.

**Applying the skills / learning to 'real life situations'**
Having relaxed delegates into the concept of using drama, we then split delegates into two smaller groups each with one actor and one trainer. Each group was given a list (with a two line description) of approximately 15 scenarios relating to managing performance. These were prepared in advance of the workshop, based on issues that the client felt needed to be addressed and included some based on real life scenarios fed back as part of the pre-work.

For each scenario, the delegate was given a few minutes to discuss with their colleagues / prepare and we then played out the scenario. The delegate was first asked to provide feedback on how they did, colleagues were then asked for constructive feedback. Finally, the actor was asked for their 'emotional feedback' – ie how they actually feel as a result of what was said to them and how. Throughout the feedback, the trainer also provided feedback / back up theory and then summarised the key learning points before giving the delegate the chance to replay the situation taking this on board. Topics covered included:

- Consistently not meeting performance standard
- A good performer whose standards have started to drop
- Motivating / developing a high flyer to stay interested
- Giving constructive feedback and developing improvement plans

**Action Planning**
The day was concluded with a session where each delegate looked at what they had learned so far, what gaps they still had in their knowledge and what actions they were going to take both to utilise their new skills and to fill the gaps that remain

We have since run follow up sessions with Rockwell on 'Dealing with Difficult People' and have worked with their HR manager when they moved to a new organisation on the implementation of a competency-based approach to performance management.

# Case Study 9 – Performance Reviews at Kirklees Council

During our work with Kirklees Planning Service, one of the key priorities for the next year was to improve the level of management skills in the department. There had been negative feedback both from staff and the recent Investors in People Audit (which specifically picked up on the lack of PRDs and training plans).

In addition, the council was implementing an organization-wide Performance Review and Development process (an enhancement of the previous Performance Management system, which was not universally adhered to). It was agreed that a top priority needed to be to give full briefing / training to all staff on the process and to ensure that there was a firm link back to the new Service Development Plan, which set out the department's priorities for the coming year.

Three events were arranged to achieve this objective:

- A two-day session with all line managers to brief them on the Service Development Plan and the new PRD process and give them the opportunity to practice some of the skills they would need to hold their PRD meetings
- Two half day briefing sessions (50% of staff in each) for all staff on the Service Development Plan and the PRD process
- Two half day training sessions for all staff on their role in PRDs

## Two-day Management Training

The strapline for the two day session was:

**One Service – One Agenda : Making It Happen!**

This was based on the theme for the improvement programme – One Service, One Agenda. Also there had been a lot of talking so far, so we wanted the emphasis to be on making it happen. As well as PRDs we used this event to kick off the 360 Degree Feedback process, so you will see reference to this included also. The Agenda was as follows:

Day 1 – Creating the Environment

| | | |
|---|---|---|
| 09.00 | Arrival / refreshments | |
| 09.15 | Introduction / Objectives / Ice-breaker | JB/SY |
| 09.45 | Briefing on 06/07 priorities / Service Development Plan | JB/AR/JM |
| 10.45 | Break | |
| 11.00 | Making the Most of Your 360 Process | SY/PL |
| 12.45 | Lunch | |
| 13.30 | Energiser | SY/PL |
| 13.45 | Getting the Best from the 06/07 PRD Process | |
| | • The link between PEAK and PRDs | CF |
| | • Making the link with 06/07 priorities | AR |
| | • The manager's role in PRDs | SY/PL/DS |
| | • Working through the PRD /appraisal process | SY/PL/DS |

16.15 Review of Day / Learning SY
16.30 Depart

**Day 2 – Skills Development for Managing Appraisals**

All activities on Day 2 facilitated by SY / PL

9.00 Arrival / Registration
9.15 Energiser / Objectives
9.30 Introducing the Topic
Discussion on managing appraisals and performance
Summary / Review of the process of appraisals from Day 1
09.45 Understanding / Learning / Practising the Skills
Forum drama using actors and feedback
11.00 De-brief and 'theory' discussion from previous session
11.15 Break
11.30 Individual Exercise to consider needs and issues for own team's PRDs
12.15 Small group discussions on key issues and chose scenarios for afternoon session
12.30 Lunch
13.15 Applying the skills / learning to 'real life situations'
Role Play using actors in 2 groups
14.30 Break
14.45 Continue role plays
16.00 Action Planning
16.30 Learning review, feedback and close event
16.45 Depart

**Detailed Description of Activities – Day 1**

## Introduction / Briefing on Day / Ice-breaker

The New Head of Service (who was at this point still on notice from his previous job) opened the event and gave his support for the programme – an excellent motivator to start the event.

Pearlcatchers then ran the ice-breaker The Colour of Motivation to both 'wake them up' and get them thinking about some topics that will relate to both the event and the challenges ahead. Delegates are split into teams and each given a pack containing a selection of different colours pieces of paper. As a team they have to arrange them in order from least to most motivating. As well as getting them to start talking, this game shows how different things motivate different people (15 mins)

### Briefing on 06/07 priorities / Service Development Plan

The Head of Service opened the presentation with his 'personal overview' of the service improvement work and his 'vision' for the Service. The Assistant Head of Service, then put the work into the organisational context in terms of where we are/ the SPP / Best in Class etc

The Policy and Design Manager then talked about the 06/07 priorities – the basis for the (still at that point draft) Service Development Plan. She presented the 'likely year 1 priorities', following the 'quick and dirty review' that week (on the basis that these are essential for PRD planning) and very much make the distinction between aspirations and

realistic service planning. The presentation also included details of the next steps with the management team to finalise the plan

After the presentation, the managers were split into 3 groups facilitated by Pearlcatchers. The groups had 15 minutes for discussion and 15 minutes for feedback. They discussed the following in relation to the likely year one priorities.

- What is our role – as individuals and a management team – in achieving these priorities?
- What skills will you need to develop to lead the department through this process

**Making the Most of Your 360 Process**

This session lasted 105 minutes and covered:

- How 360 fits into the wider Leadership Development and Service Improvement Programme (why we are doing it)
- What 360 does and how the process works
- Understanding, welcoming and making use of feedback
- Planning your 360 experience
- Final Q&A

**Getting the Best Out of the 06/07 PRD Process**

***Briefing***
It was essential that everyone within the Planning Service understands their role in achieving the 06/07 priorities. The new PRD process is an excellent mechanism to both cascade the priorities and to set individual objectives and development plans that can be aligned to the Service Development Plan. The session started with a presentation from their Corporate HR department about how PRDs fit into the corporate framework, how the basic process works and touch on the role of competencies. This was followed by their Assistant Head of Service talking about 'making the link between achieving the priorities and PRD' and will include some examples of outcomes, outputs, inputs. There was then a short Q&A session to discuss any initial queries or issues that managers have about the new process.

***Training***
We then moved onto a more formal 'training' session which was led by Pearlcather with involvement from their HR team. This session worked through the process of PRDs as follows:

- Each manager was asked to pick one of their direct reports to work through the process. We suggested someone who had very obvious development needs as a starting point as this would make it easier to see what needs to be done. We advised that although we would not have time to fully prepare for this person's PRD, they would see how the process works and have identified any main points at each stage. Managers were given (as part of their packs) a document which details each stage and allows space to fill in the details
- The first stage wias a general discussion on 'The manager's role in PRDs'. Whilst this was be fairly open, we used it to re-emphasise the points made earlier about leading the 06/07 priorities etc. This finished with a basic overview of the process as detailed on P12 of the Managers' Guide.

- Each of the following sections started with a short presentation from / discussion facilitated by one of the consultants. Delegates then worked through that section of their form relating to the employee / objective they had picked as an example

- Review of Last Period
    - Where will you get the information from
    - Reviewing previous objectives
    - Reviewing performance generally
    - Questions to ask (yourself and the delegate)
    - Preparing feedback (constructive etc)
    - Reviewing Development Needs, Activities and Progress
    - Summarising Review Discussion

- Set Objectives for Coming Year
    - My team's involvement in 06/07 priorities
    - Refining to individual objectives
    - 'Left overs' and requirements identified from review

- Competencies
    - What are they, why do we need them and how do we use them
    - Explaining competencies to others
    - Setting levels for coming year
    - Technical competencies

- Training and Development Needs
    - Linking development to past performance deficits
    - Linking to objectives for the coming year
    - Linking to career aspirations
    - Linking to competency development
    - Considering training activities

**Review / Close Day**
At the end of the day, we reviewed what we had achieved, reconfirmed any key learning points and congratulated everyone on the work they have done so far. We then reminded them briefly of what we will be doing on the second day

*Day 2 – Skills Development*

**Pre-work**
The managers had been sent a questionnaire in advance, asking the following:

- What do you understand by the term 'managing performance'
- What aspects of managing performance are you most comfortable with
- What aspects of managing performance do you find most difficult (would you like to receive some development on)
- What experience do you have of running PDR meetings? What specific aspects do you enjoy / worry about?

- Think of a difficult situation you have encountered (either in the past, currently or which you anticipate might happen in the future) when managing performance / holding an appraisal:

**Introducing the Topic**

We asked the question "What is meant by the term managing performance" and solicit responses from the delegates. Through open discussion, we clarified that it is not just about appraisals, it is:

- Setting objectives
- Ongoing monitoring and evaluation
- Regular reviews and 121s
- Recognising development needs and opportunities
- 'Managing' development activities
- Dealing with poor performance
- Managing high performers
- Reward and recognition
- Formal appraisal processes

We then came back to appraisals and ask edwhat role they play in the process of both managing performance – and achieving departmental / organisational objectives. Finally, we widened the discussion to ask what skills do you need to effectively manage performance – and specifically run appraisals. This incorporated a little theory on the iceberg methodology and emphasise that effective performance management is about the way in which **you** deal with the person, not just fill in the forms

**Understanding / Learning / Practising the Skills**

The focus of the morning session was on managing the interaction – not the process. We created a series of scenarios that were performed by two actors in the format of forum drama. As well as learning on the topic itself, this will get delegates used to the concept of drama-based learning and giving feedback, so they will be more relaxed for the afternoon role plays. These scenarios dealt with the various skills necessary for managing performance, such as:

- Active Listening
- Questioning to gain information – open and closed questions
- Summarising to check your understanding
- Body language
- Giving feedback
- Using the right language
- Understanding other's points of view

**De-brief and 'theory' discussion from previous session**

This session lookedat what has been learned from the previous two sessions and re-emphasised / explained some of the theory that backs up what has been discussed

**Individual Exercise to consider needs and issues for own PDRs**

Based on everything they had heard over the previous two days, we asked the managers individually to complete a one page sheet for each of their direct reports to start planning their PRDs. We included suitable prompts to aid their thinking, including past performance, future objectives, development areas, potential issues etc.

**Small group discussions on key issues and chose scenarios**
The delegates were then split into the two groups that they were to work in for the afternoon session. Taking as much information as they were happy to share from the previous exercise, they had an open discussion about what are the key issues facing them in the forthcoming PRDs.

We then gave them a list of potential scenarios with brief descriptions, which they could undertake during the afternoon. Based on the potential issues, the team had to first decide which of the scenarios they would most like to practice (producing a short list in order of preference) and then which of them will undertake each role play

**Applying the skills / learning to 'real life situations'**
Straight after lunch, delegates split into their 2 groups and were told the order of their role plays. Each group had a facilitator and an actor. There was one male and one female actor and we swapped them between groups half way through, so there was an opportunity to practice with each sex.

To give as many people the chance to take part as possible, we allowed 20 minutes for each role play – which will meant a total of around 6 in the time available.

We used standard role play and applied it to the kind of situations that theirr managers may come across when managing appraisals – with the actor playing the employee and the delegates playing the manager. After the first attempt, the facilitator asked for feedback from the delegate doing the role play as to how they felt, the actor for their 'emotional feedback' and the group for what they observed. The facilitator also gave feedback and linked back to the theory

**Action Planning**

The skills workshop was concluded with a session where each delegate looked at what they had learned so far, what gaps they had in their knowledge and what actions they were going to take both to utilise their new skills and to fill the gaps that remain

*Half Day Staff Briefing Sessions*

These sessions focused mostly on an update on the Service Development Plan (and how it had developed from their initial ideas from the Service Away Day the previous September). The same session on the basics of the PRD process was also run. For the most part it was felt that the managers should give the presentations, but Pearlcatchers were heavily involved in both the content of the presentations and coaching the managers (some of whom were very inexperienced in public speaking) on the presentation skills.

## Half Day Staff Training Sessions

These sessions ran on a very similar format to the first afternoon of the managers training. They had a work-book to go through and had the opportunity to discuss any concerns about the process and their role in this. These sessions were facilitated by Pearlcatchers, with support from the senior management team.

## *Case Study 4 – Centura Foods*
## *Business Simulation as final module of Management Programme*

Centura Foods run a 'Horizons Programme' for young managers and graduates to introduce them to operational management. The programme was run over 12 months and commenced in October 2004. There have been 4 two-day modules each dealing with a different area of the business / aspect of operational management

For the fifth and final module, Centura wanted to run a business simulation based on a case study that was related to the food manufacturing industry. The overall purpose of this module was to bring together what had been learned over the previous 12 months and to give the managers 'experience' of running a business.

They wanted the simulation to run over a period of 'months' and deal with the following management skills:

- Forecasting and planning
- Analysing financial data
- Costing order and pricing
- Quality and factory / production issues
- Innovation
- Risk management
- Team work and managing staff

At some point during the simulation, Centura also wanted to incorporate a business presentation to an 'Executive Team', who would then assess the winning team. Due to business pressures, the event needed to be contained within one day

### The Case Study

To provide sufficient detail without too many complexities, we needed an organisation that was smaller than Centura, but still incorporated a degree of 'food manufacturing' within its remit. We therefore decided on an ice cream parlour at a seaside resort, which produced its own ice cream. In this way, the kitchen represented the manufacturing plant and the shop the sales and marketing functions.

The case study itself contained various amounts of information around areas such as number of staff (with background info), financial information, how the organisation was structured, how the 'plant' works, competitor information etc. The 'Trading Centre' also held other information, but this would only be provided following a direct request.

To fit with both the case study and the theme of the event, the business simulation was entitled 'A Taste of Success'

# ***Case Study 4 contd… /***

**Advance Communication**

The delegates were split into teams in advance of the event and every delegate was sent an individual briefing note, advising that for Module 5 of the Horizons programme, they would be given the chance to put into practice what they had learned, both in terms of the different areas of an organisation and the business and personal skills required to effectively manage its operations

They were advised that they would have the to work as part of the management team of a successful ice-cream parlour in the seaside town of Brighton, which was looking to expand and open other shops in other areas – until ultimately they had a chain with a shop in every major seaside town in the UK.

The briefing went on to advise that they needed investors to fund the first phase of this expansion and that they had several interested parties, who wanted to review their performance over a 6-month period, as well as their detailed plans moving forward. They were also advised that companies were trying to obtain funding from the same sources, so they would be in direct competition.

As one of the objectives of the overall Horizons Programme was to familiarise them with all aspects of the business, the case study company was split into three main areas: Marketing; Production; Sales and Support. The delegates were provided with Job Descriptions both for each area and the management team generally. They were asked to meet with the rest of their team before the event to:

- decide upon a name for their company / shop.
- decide who was going to take on each of the management roles – however, they were not permitted to take on a role that related to the area of the business in which they worked at that time

**The Task**

The overall task for the teams was to win funding from the potential investors, both by showing how well they operated and planning their expansion strategy. However, to help them make their decision, the potential investors set them a specific task to create a new flavour of ice cream and market it to existing and potential customers during the busy summer period.

They were advised that how well they managed the design and implementation process of this new ‘product’, including sales and profit would play a large part in the investors’ final decision

The teams were advised that the investors would make their decision based on:

- Profitability and forecasted turnover
- How well you manage the organisation
- Vision, feasibility and planning of their expansion strategy

# ***Case Study 4 contd… /***

The teams ran their ice cream parlours for six months on a quarterly basis. Each quarter they had to make decisions regarding:

- Staff
- Market Research
- Advertising and PR
- Ice Cream Price

In addition a number of other decisions had to be made at various points in the simulation:

- Flavour of ice cream
- Supplier of raw materials – quality v price etc
- Size of first order
- Hire of equipment

On the basis of 'cause and effect', the decisions that the teams made affected some of the issues that they encountered later in the day (for example, those that did not choose to interview a supervisor had staff issues, those that went for the cheapest supplier had delivery issues etc).

**Facilitation of the Event**

Each team was allocated its own headquarters, with table, chairs, flipchart and computer. The main meeting room was set up as the 'Trading Centre' where we input all the decisions onto the central computer and coordinated the various activities. There was also a meeting room, where any meetings with customers, staff, suppliers etc took place.

After the initial briefing, each team were taken to their headquarters and were allocated a facilitator to both act as a link between them and the trading centre and to observe how they performed as a team. Two facilitators and a team of actors were also based in the Trading Centre until they were required to carry out activities.

Each quarter lasted a set amount of time and all the decisions had to be made by certain times within that period. Failure to make decisions on time, resulted in penalties. At the end of each quarter, the decisions they made were fed into the Trading Centre Computer, which then calculated sales, costs, profit and loss for the period. A results print out for the previous quarter was handed to each management team before the briefing for the next quarter. Each team facilitator also lead a short de-brief on the previous quarter and gave their team some tips and suggestions on how to improve performance, as appropriate.

At various points in the exercise teams could either ask to see staff, suppliers etc or they would be handed a Development Card advising that something had occurred (generally as a result of their earlier decisions) that required them to meet a particular individual. They were given some basic information and a few minutes to prepare before meeting the actors

# ***Case Study 4 contd… /***

As finance was a key factor in the managers' development, we built this into the simulation by means of a balance sheet, forecasting tool and profit and loss spreadsheet. Each team had to ensure they planned their cash flow / finances so that there were sufficient funds available to pay suppliers, employees and all other outgoings in a timely fashion.

Every time they made a payment, they had to physically write a cheque and hand it to the facilitator and then enter the payment onto their Balance Sheet. At the end of each quarter, each team received a cheque from the Trading Centre for their income for the previous period and this was also be logged on the Balance Sheet.

The final presentation was given to the 'board of investors' and covered off both presentation skills and strategy / project management.

**The Learning**

This was obviously the most important part of the day. The group were given the opportunity to learn from experience by having debriefs in their small teams after each quarter. There was then a final debrief with the entire group after the presentation.

By using a variety of tasks and activities, we were able to incorporate all the required learning outcomes, as follows:

- Costing/ forecasting/ planning - how much do we need to sell to make a profit
- Ordering - which supplier; cost v quality etc + managing the relationship
- Quality / manufacturing issues – faulty equipment, poor quality materials etc)
- Analysing financial data - forecasting, pricing, balance sheet, profit and loss
- Risk management - both as a key section of the presentation and using occasions where they did not manage risk to present them with resulting situations
- Innovation – both deciding on what new flavour to make and designing a marketing strategy to advertise it (including flyers)
- Managing people – dealing with staff, customer and supplier issues using actors

# ***Case Study 3 – Customer Care at Adactus Housing***

Adactus Housing Group has recently undergone huge expansion – virtually doubling in size with the amalgamation of several organisations. Training was seen as a major priority for the new organisation and so a consultation was carried out with staff at all levels to discover what areas were considered as priorities for the coming year

Customer care was identified as one of the key training needs and there was a desire for something more in-depth than the standard customer services training. As a result, Adactus put together a brief that included topics such as communication etiquette, body language, interpersonal skills, working as a team, handling conflict and complaints

Following a tender process, Pearlcatchers were appointed as consultants to deliver this training to two pilot groups of 15 delegates in two separate locations around Manchester. We worked with Adactus to design a programme of five half-day sessions that covered all the desired topics, plus some complementary subjects, which flowed in a logical sequence from setting the scene right through to dealing with difficult situations

Each module lasted three hours and included the following activities:

- Pre-work - a short activity or questionnaire to make the most of time available by getting delegates thinking about the topic in advance
- Ice-breaker – to get people warmed up and straight into doing / talking
- Practical Sessions –rather than spend long periods in front of a Powerpoint presentation laboriously talking through various theories, we tended to show the key points through activities and then confirmed the learning on Powerpoint or flipcharts – aiming for theory sessions of no longer than 10-15 minutes each.
- Learning Review – the final session of the day always drew together all that had been learned / practised during the day

**Module 1 - Setting the scene / developing the right attitudes**
Module 1 was all about creating the right attitudes and a firm foundation on which to build the rest of the programme. We started with an icebreaker 'Customer Service Means', where delegates made up sentences to define customer care. This formed the basis for discussing customer care and what it means to different people, which led into a short discussion on why customer care is important to Adactus Housing.

We then got delegates to consider their own examples of good and bad customer service – and discussed the features that made up good or bad customer care. We then explored two questions 'who are your customers and what do they want?' – using our Customer Values exercise. We started by identifying key customer groups and some of their key characteristics. We then asked delegates to put themselves in the customer's shoes and consider what would be of most value to them – in terms of service from Adactus. This is a great way of getting employees to see things from a customer's perspective and led to some theory on customer standards, as well as a look at the organisations' new Customer Charter and Standards and what this might mean for both their tenants and employees (in terms of meeting the service guarantees).

## *Case Study 1 contd … /*

We then looked at the two main types of barrier to customer care – personal and organisational and spent some time identifying these and discussing how you might overcome of them – we also previewed some of the issues that would be dealt with in more detail on later modules. We then watched a short inspirational video that really brings home the point that the difference between good and excellent customer care is all about putting your personal signature on the job – and seeing that each individual can really have an impact. We closed with a short session where delegates made a commitment to some key actions they could personally take to improve their customer care.

**Module 2 – Communication Skills** - Module 2 focussed on our interactions with others, which is a crucial part of customer care. We started with an intentionally open question 'What is the most important thing in communication' which delegates discussed in small groups and we then talked about as a whole. We identified that body language is a crucial part of communication, which led us onto the next session.

This was the first session where we introduced delegates to the actors – where initially they demonstrated the impact of different types of body language and how small adjustments can have a huge impact on the message you give out. We then used the actors to play out short scenarios that demonstrated some of the 'do's and don'ts' in terms of communication etiquette and key skills, such as listening, questioning etc and looked at vocal qualities, such as tone and pace.

We then moved onto telephone techniques and the actors again performed some 'how not to' scenarios which allowed us to discuss and reflect on the correct techniques to use (such as the initial greeting, transferring calls, wrapping up the call etc). Finally we looked at written communication and specifically e-mail (which was perceived as an issue for some) and worked through good and bad use of e-mail, finishing with a list of top tips

**Module 3 – Self Awareness and Self Management** - One of the major barriers to customer care is our own state of mind – our emotions, beliefs or even our mood on a particular day. Therefore being aware of what affects us and being able to manage ourselves is an essential skill – as is learning how to make best use of the time we have available. This module was very much about understanding and managing yourself.

We started by asking what factors might affect people's effectiveness and introduced the 'iceberg model', which shows how we only see people's behaviours (what is above the surface), but not their thoughts, beliefs, feelings moods etc (below the surface) that might affect how they react. We spent some time getting delegates to think about their beliefs and their moods and how these might affect their ability to deliver excellent customer care and gave them some tools for better managing these. We then looked at assertiveness and the range of influencing styles available to everyone. Delegates were asked to draw their own 'influencing map' to identify their preferred styles and how adopting a different style may help to improve 'difficult relationships'. We then talked about key issues with time management and provided some top tips for delegates to try out – this included a work book of activities for them to complete prior to the next session.

## *Case Study 3 contd … /*

**Module 4 – Working with others to achieve excellent customer care –** the focus of this module was on learning how to work well with different people and in a number of different

'teams. We started by looking at different kinds of relationship and discussing our responsibilities towards internal customers. We again used the actors to demonstrate some of the 'do's and don'ts' of building and maintaining relationships with others. We identified the ability to build rapport as a key factor and spent some time looking at the various tips on building rapport and got delegates to try these out on each other.

We then moved onto teamwork and got delegates to consider the role they play in teams by using the analogy of different animals. Delegates were asked to pick which animal that they felt most represented their style in teams and then asked to consider the positives and negatives of this style and how to accommodate a diversity of styles and beliefs when working together. We finished off by getting each delegate to committing to one action for improving service to their internal customers.

**Module 5 – Dealing with Difficult Situations** - Applying the principles of customer care is fairly easy when everything is going well. However, we all know that things go wrong, you have conflicts with colleagues, customers complain or can be difficult even obnoxious. These situations require additional skills, which we worked on in this module. We started by a demonstration of a major conflict situation in the workplace and then talked about ways to handle conflict.

We then moved to customer situations and again demonstrated various difficult scenarios, which were followed by discussion and talking through some formal techniques for dealing with customer complaints / difficult customers. We then split delegates into two groups (with one actor and trainer per group) and asked them to choose from 15 scenarios that we had created based on their feedback / our own experience. Time allowed for a total of 6-8 role plays per session, involving playing out the scenario, receiving feedback from colleagues, the actor and the trainer and (time permitting) replaying to embed the learning. Scenarios on the day included dealing with an irate tenant with a complaint about a repair, dealing with an elderly resident with personal hygiene problems; talking to a colleague who has made racist comments and saying no to a customer on the waiting list.

The session was concluded by a review of the programme and delegates were given time to complete a detailed learning review and to consider what areas they want to develop further. The following is a summary of feedback from the pilot programme, which is now being rolled out to 200 employees:

"Very comprehensive look at customer care. Went more deeply than I expected – not just how to answer the phone."

"The sessions felt much shorter than the 3 hours. Kept us interested all the way through".
*"I really enjoyed this – other colleagues have commented that it has had a very positive impact on me!"*
*"Overall the longest customer care training I have ever done, but certainly the best. A unique and often very entertaining way of putting across important information."*

## 4.2 Case Study 7 – Teambuilding at RAF Benson

Pearlcatchers were asked by the Infrastructure Organisation at RAF Benson to arrange a team building day for between 15 and 30 team members. The main purpose of the event was to be motivational as the team were going through a lot of changes – moving location and some loss of jobs. They also wanted to have some learning around the different roles that people play in teams, but did not want to have 'too much theory'

We suggested one of our half-day challenges – The Diamond Dome, where like most of our events, the focus of the majority of our activities is that there are many different tasks, each requiring different skills (creativity, mental agility etc). In this way, all delegates should find something that i) interests them and ii) they are good at. This is an excellent way to help teams gel together by recognizing the different skill sets they all bring to the team. We advised them that this activity has a learning / fun ration of around 80% fun / 20% learning. Below is a description of the event:

**The Diamond Dome**
Discover the skills, knowledge and creativity of your teams as they work through individual, paired and team challenges. Test their minds and bodies as they explore the six different zones of The Diamond Dome

- Find your way through the many twists and turns in ***The Musical Maze*** as we test your ears, eyes and voices in a selection of challenges
- Put on your thinking hats and take the ***Cerebral Challenge …*** a series of activities to test mental agility, memory, logical and lateral thinking
- The entire team need to work together to successfully complete the challenges within ***Team Trials***
- You'll be amazed at how much creativity and artistic license is released in ***Creativity Corner***

Each team is given a passport and a site map and are then escorted to their first zone. The teams will have an allocated time in each zone, during which they will try as many challenges as possible. Upon successful completion of a task, your passport will be stamped, so you can see at any time how many diamonds you have earned. You will then be told which challenge or zone you need to go to next and left to make your way there in the quickest time possible.

When they have completed all the zones, teams will return to the central 'arena' where they will take it in turns to take on The Diamond Dome Decider. The more diamonds you have collected the more time you have in the decider.

This is probably the most fun-oriented of our events, which involves teams competing against each other. The main learning points come firstly from recognizing that each person has different skills and abilities and therefore brings different things to the team (and also that you do not always know about these skills). There is also some learning about how they plan their activities, communicate, solve problems etc.

As they wanted to go with this event, we suggested some additional activities, after the main competition to focus more on working as one big team
Before the morning review session, we asked them to complete another activity – Fits Like a Glove (the instructions for which are included in the support material). The basic premise is that you split the delegates in half and each have a jigsaw of a motivational picture / message. They are instructed that they are each responsible for their own pieces of the puzzle and the task is complete when the puzzle is finished. What we don't tell them is that the two puzzles have slightly different sized pieces and we have muddled them up – so they have to work together in one big team to complete the task. So basically the puzzle is actually both of the jigsaws being completed

The key points from this exercise are :

- They assumed that they were in teams each with their own task – we did not say that, we just said split you in half.
- The purpose of the exercise is that although on occasions you work in small teams on specific tasks (like the Diamond Dome), you are all part of a bigger team – your whole department and even the entire base, RAF etc etc
- Don't let yourself get so focussed on the detail of a specific task that you forget the overall objective of your wider team

The key points from the Diamond Dome debrief were:

- Everyone brings something different to the team – skills, knowledge, personality etc
- Using these skills appropriately makes an effective team
- Communication is essential to effective teamworking
- Teams work better when they have a clear objective

In the afternoon, they started looking at the roles that people play in teams. They started off talking about and then completing Belbin's Team Role Questionnaire, so they could ascertain the roles they each play. We talked briefly about the team strengths (where a lot of people have a preference) and weaknesses (where no one has a preference) in the team. We then asked what impact this has / might have on their effectiveness as a team and what they could do to balance the weakness

To show them what they contribute to the team in a more visual and creative way, we then played Totem Pole Tales - an original and fun way to tell the story of your team.
Every picture tells a story – and this is also the case with a totem pole. Each team member is responsible for designing their own section of the totem pole in isolation – this should represent them and what they bring to the team. Armed with a wide range of paper, card, pens, paint and craft items, you can be as creative as you like. Each person then explains their section of the totem pole and how it represents them. The team will then come together and build a totem pole out of the individual sections. The completed pole must both fit together and stand unsupported and also form the foundation of a story, which the team must recount to the audience. This is a great activity for bringing a team together and finding a common ground and purpose.

The final debrief for the day then focussed on:

- What are your major strengths as a team
- What areas do you need to develop further
- What actions can you take (individually and / or together) to improve these areas

## 4.3 Case Study 8 – Team Development with Sure Start

The Programme Manager of SureStart in Hartlepool contacted Pearlcatchers and provided the following brief:

- Gill manages the SureStart Programme, which focuses (currently) on under 4's. The team has over 60 members, including a wide variety of specialists (from midwifery to social services to mental health) and support staff
- Historically the team have been extremely motivated and productive, receiving awards and positive feedback from many sources
- Unfortunately, there has been a serious disciplinary with one team member over the last few months, which involved her being transferred out of the team whilst the disciplinary was being progressed
- Due to company procedures, it was not possible to share information with team members. However, there have been considerable grapevine discussions and Gill was concerned that this had resulted in a loss of trust and team morale.
- Sickness levels have increased and whilst productivity had been maintained to that point, there were concerns about the ongoing impact of any further disruption. This concern was further highlighted due to the disciplinary of a further team member, also on long-term sick
- The team regularly meet for away-days, teambuilding and planning sessions and it had been agreed that the original agenda for the next event needed to be changed to focus on rebuilding trust and team morale
- Initially, it was suggested that the first day would be spent on teambuilding activities and the second planning for the future
- The objective of the first day was to get the team functioning together again and positive and motivated for day 2 when they were to refocus on the future
- There was an interest in using drama-based activities – such as forum theatre – to bring the issues to life as well as other fun and creative teambuilding activities to build motivation and involvement

Pearlcatchers suggested the following agenda for Day 1:

| | |
|---|---|
| 9.45 | Desperately Seeking … Ice breaker during registration |
| 10.15 | Welcome and introductions |
| 10.30 | Team Coat of Arms |
| 11.15 | Break |
| 11.30 | Forum Theatre Sketch |
| 11.45 | Break out into groups |
| 12.30 | Review output of teambuilding (delegates) |
| 12.45 | Replay of sketch |
| 13.00 | Lunch |
| 13.45 | Briefing for afternoon activity |
| 14.00 | Make videos |
| 15.30 | Watch videos (SY) |
| 15.45 | Break and scoring and |
| 16.00 | De-brief / review of learning from the day |
| 16.430 | Depart |

The basis of the agenda was to use a number of different techniques to get the team relaxed and thinking in a creative manner.

The underlying purpose of the day was to take the delegates through the team development process of:

- Getting to know each other
- Working to a common vision
- Considering some of their problem areas
- Working together on a common task
- Recognising the benefits of working together as a team

Further detail on each of activities follows:

**Desperately Seeking …**
This activity is a simple ice-breaker with the objective of getting attendees talking to each other and not just sticking with the few people they work closely with all the time. On arrival, each participant is given a card with a name and information about that person or item. Each card is part of a pair (such as Laurel and Hardy or Tom and Jerry) and the objective of the game is for participants to talk to as many other members as possible in their search to find the other half of their pair. To further encourage mixing of the group, delegates were asked to enter the main conference room 'in their pairs'. The secondary objective of the ice-breaker is to get people talking and energy levels rising

**Team Coat of Arms**
Delegates were split into groups, which roughly equated to the key themes of the SureStart programme. Armed with multi-coloured sheets of card and an array of pens, pencils and paints, they were given the task of creating a coat of arms that would represent some of the key qualities they would like SureStart Central to possess / be known by.

As well as uniting the team in a common purpose the objective of this activity is to increase their motivation and release their hidden creativity. Each team had the opportunity to present their coat of arms to the rest of the group and explain the rationale behind their approach.

**Family Affairs – Forum Theatre**
Forum Theatre is a new and powerful development activity that uses drama to embed learning. It is an improvised play that addresses specific issues that are pertinent to the needs of the client. Each character in the drama represents key issues and concerns, confronts the audience with their dilemmas and asks for advice and guidance. This is then improvised into the drama

Forum theatre provides a safe environment to try out new ideas, tackle sensitive subjects and share knowledge. It allows participants the rare benefit of hindsight with the ability to rewind the action and try again. This technique is particularly useful for tackling sensitive or taboo topics, such as those experienced at SureStart. Following detailed conversations with Gill, we wrote a tailored sketch that reflected some of the issues that were being experienced. The situation we choose is usually humorous and focussed on a situation that all can relate to, so as not to feel threatened. Based on our conversations, we agreed that the scenario would be a 'family in crisis' as this linked closely to both team issues and the environment that the team work within.
The sketch was based on the trials and tribulations of the Regal family, coping with the departure of the eldest son's wife, leaving them to cope with two young children, not to

mention his younger sister's baby and a bed-ridden grandma. The sketch lasted approximately 15 minutes and ended with the characters in a stalemate. At this point our facilitator intervened and advised the audience that they would now need to take on the role of 'family counsellors' to help resolve the issues.

Due to the size of the group and sensitivity of some of the issues, we agreed that rather than ask the entire group for feedback on the spot, we split them into 5 groups of 10, each of which were facilitated by one of the actors. To ensure a good mix, the groups were pre-selected by Pearlcatchers to include some people from each of the key themes. The groups are given the following tasks:

- To discuss the issues that were raised by the sketch and relate them to their own experiences (ie: which/when/how have they come across these issues in their own environments
- To consider the impact that these 'errors' might have on how the family function / work together and their ability to arrange a great event for Grandma's 80th
- To suggest ways that the situation could be handled better that can be fed back to the actors
- To relate these suggestions to their own situations and how they might do things differently in future

This feedback was then collated by the actors and a follow on sketch played out taking on board the comments and suggestions of the team. The session was concluded with a short debrief and review session

**Lights, Camera, Action**
In the afternoon, the team were split into different groups of approximately 10 and given the task of making a 3 minute video recording with the following remit:

> "Imagine that the SureStart programme is recruiting for new employees. You must film an advert for people who may want to join the team. The advert should be designed both to attract them to the organisation / role and to explain a little about the kind of person that is needed to fit into your team and make a success of the job"

Each of the teams were given a different theme to work with, which ranged from Star Wars to Disco Daze and Panto Land. Further spice was added by giving each team only basic costumes and props for their theme, but offering them the chance to win additional equipment, special effects or support staff by successfully completing one of several team challenges at any point during the game.

The teams had to design, cast and act out their video – ready for everyone to watch and vote on. The idea is that there is so much to do that everyone will find something to suit their skills, from creating sound effects, to directing the action or coordinating the fight scene. At the end of the time, the entire group got to watch the premier of each of the videos and everyone voted on the winners – which included awards such as 'Cheesiest Moment' and 'Technical Excellence' as well as the more usual 'Best Actor' and 'Best Film' Feedback from Day 1, was as follows:

**Desperately Seeking**
There was a definite desire on the part of the management team to get everyone to feel relaxed and have the opportunity to move out of their usual set of close colleagues and

make links with other team mates. This activity was a good start to this process. It also achieved its objective of raising energy levels before the formal start of the conference

## Team Coat of Arms

This activity was received very well. There was a huge amount of discussion, energy, enthusiasm and creativity going on in the room throughout the activity. Our role as facilitators was to ensure that no one was left on the sidelines, but there was no danger of this. Each individual got incredibly involved in the process and each team worked extremely well together to create some great coat of arms – not only in terms of how they looked, but also the meaning behind each of the 'symbols'.

The feedback session where each team introduced their coat of arms to the rest of the group was very positive. What struck me most was the degree of pride with which people introduced their 'product' and the receptive manner in which the rest of the group listened and complimented their efforts. It was also interesting to see a good many themes coming through from several groups, such as the holding hands symbol

**Family Affairs**

There was a little concern in advance that this exercise might open some cans of worms and that discussions would devolve into debates about the rights and wrongs of the disciplinary situation that was going on in the background. To ensure that this did not happen and no one was made to feel uncomfortable, our facilitators were briefed to focus very much on what could be done to improve the situation rather than dwelling too much on the issues.

However, these fears were not realised and although issues were raised, the overall atmosphere remained positive and forward looking. In retrospect it was felt that the session was maybe made a little too safe and we could have taken a few more 'risks' in terms of tackling some of the underlying issues (however, this was picked up later on day 2). Some of the key learning points that came out of the session were:

- how a team can be like a 'family'
- how the feelings and / or departure of one part of the family can have a major effect on the group dynamics - with no one knowing what role they should play or what side they should take
- that this feeling of confusion can lead to loss of focus, motivation and morale within the family / team
- the role of the manager (or parent in this case) and how they have to sometimes be a bit 'removed' from the team to do their job properly and also that they have a duty to each individual family member to 'keep their business private' and not publicise it to everyone else
- that if they all pull together and focus on something positive that the team can help each other move forward in maybe an even more positive way (ie learning from each experience)

**Lights Camera Action**

This exercise worked extremely well against its objective of focussing the team on a common task / goal. Going around the groups we could clearly see the different roles people were taking on and how the individual skills of each team member were utilised and appreciated. There was a great sense of camaraderie both during the filming and the viewing session afterwards and a good deal of back-slapping and people laughing at themselves as well as with each other (rather than at each other)

**Debrief**
The feeling at the end of day 1 was very positive, with comments from people, such as “it’s great to be working and having fun together again”; “it’s nice to see everyone smiling”. Therefore in terms of the outcomes - getting to know each other a bit more, leaving behind some of the issues, focussing on the future and on common tasks – I believe that the day was very successful

**Day 2**
When we met on the morning of Day 2 to discuss my role for the day, I was advised by Gill that she and the board members were keen to amend the format. The feeling was that whilst it was excellent to see how well the team were now working together etc, there was a danger that if the underlying issues were not tackled, then we may only be papering over the cracks and people would return to the workplace and fall back into the same old ways and issues with morale.

It was further felt that it would be a waste of the atmosphere of openness and honesty, to not give the team members the opportunity to talk about their issues and consider ways to improve the situation. The new format for the day was to ask the group to rate their satisfaction with working at SureStart from 1-10. Those who rated their satisfaction 6-10 were taken into another discussion area and those with a score of 1-5 stayed in the main room.

Each of these 2 groups was then split into half and each allocated a facilitator from myself and the three board members. It was felt best that Gill did not take part in any of these discussions to ensure that no one felt unable to speak in the presence of ‘the boss’.
Each of the groups were then asked the same questions: What did they like about working at SureStart and what didn’t they like? After a break, the groups were mixed up a little and they were then asked to consider how they could overcome the things they didn’t like and increase the things they did like.

The content of these discussions varied greatly – depending on the level of satisfaction within the group. Feedback from one of the more positive sessions was:

- initially the comments on things they didn’t like related to the standard gripes that most organisations hear, such as poor communication, too much work etc

- however, once people relaxed and realised that we wanted their complete honesty and there was no blame attached to this, we actually raised some of the more sensitive issues relating to the disciplinary and the actions of some individuals within the team that were disrupting life for some of their colleagues

- when we discussed possible improvements, everyone was willing to get involved and come up with suggestions – as well as being open to new ideas
- I must admit that I was pleasantly surprised by how openly some of the issues were discussed – certainly more freely than in many organisations I have worked with

- From the groups that I worked with, I came away with the feeling that they felt they had been listened to and were keen to see what was going to happen with the outputs

By its nature the discussions with the less satisfied team members were more difficult and emotive. Some delegates did become rather emotional, but the process was kept under control at all times and the outputs showed that people had obviously had issues that needed to be discussed.

These sessions were followed by a debrief session and the general perception was that people found it refreshing to be able to talk openly about their issues in a 'safe environment' and to challenge some unacceptable behaviours and attitudes.

The out puts from this event were fed back into a programme of communication and improvement groups back in the workplace, which lasted for several months

## *7.5 Case Study 14*

## *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

- 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 7 – Achieving Customer Service Excellence via the Best Practice Club**

Pearlcatchers Ltd are the training partners of the Best Practice Club – a networking organisation for organisations wanting to share knowledge and best practice. The club is referenced on the Customer Service Excellence Website (www. ) as a resource point for those interested in achieving the Customer Service Excellence Standard.

Pearlcatchers have been involved with the Best Practice Club since 2002 and for the past 2 years have managed their programme of Active Learning Days – one day training events on a range of topics that are designed and delivered based on the needs of the club's members. Past successful topics have included:

As part of our programme, we have designed and delivered three Active Learning Days around the topic of Customer Service. These are:

- Achieving Customer Service Quality
- Customer Service and Complaint Handling
- Building a Customer Culture

These event has been run successfully in the past for delegates from both public and private sector organisations. We are running another session on Achieving Customer Service Quality in October 2008.
The course descriptions are as follows:

## Achieving Customer Service Quality

### Managing Service Excellence - The Key to Improving the Customer Experience

***Products have never been better. Service has never been worse.*** *Lucky for you there are so many other disastrous customer experiences available – yours won't stand out from the crowd.*

***But what an opportunity….***

As organisations strive to get closer to their customers, the challenge of understanding, analysing and improving service quality becomes ever more important. Yet the tools to enable people to do this at the customer service interface are far less widely deployed than corresponding tools to manage product quality. "Customer Care" programmes cannot compensate for ineffective service outcomes, and research shows that customers' loyalty cannot be bought with discount schemes or compensation.

This event introduces participants to some powerful and effective techniques to put structure and method alongside the natural enthusiasm to do a good job for the customer. It also introduces participants to the basics of "Corporate Personality" – why do we accept certain behaviours from some organisations but not from others? What's the personality profile for your organisation or team?

*Outline of the Workshop*

- Understanding the nature of the services you provide – as seen through the eyes of your customers
- Analysing service quality gaps using a powerful diagnostic technique

- Setting rational priorities for service improvement, and a basis for measuring success
- Understanding the nature of customer satisfaction
- Measuring satisfaction without annoying your customers
- Integrating customer satisfaction measurement with service quality improvement
- The 7 Wastes – Why we don't always do things right
- The 7 Symptoms – Why we don't always do the right things
- Why looking at single service transactions might be a bad idea
- Why asking customers what they want might be a bad idea
- "Corporate Personality" – the psychology of customer relationships

**Benefits of attending – you will leave able to:**

- Apply proven systematic tools to analyse and improve Service Quality
- Design and implement "light touch" Customer Satisfaction measurement at local level
- Take ideas and Best Practice on handling Service Quality issues

*Customer Service and Complaints Handling*

Developing awareness, understanding, acceptance and commitment to customer service excellence

***Customer service is a key element of business performance, but do we understand what our customers really want? How do your customers feel about the service they get? How are your competitors performing? A pro-active approach to Customer Services can make a significant contribution to profitability by raising an organisation's understanding of the needs of their customers in particular and the market place in general. If it's true that customers buy experiences and that repeat business is many times more cost effective than new business, then no amount of product innovation, cost cutting or advertising can make up for poor performance in this area and developing a clear picture of what is critical to your customers' experience becomes crucial.***

Balancing the Cost, Quality, Delivery triangle, setting a clear direction
***Of course every business is different and although cost, delivery and quality are all important, how do you balance the triangle for your organisation? Management needs to have a clear view of this balance, which must be clearly and unambiguously communicated across the organisation.***

Re-energising the human face of your business
***No matter how computerised your sales order process is, your customers are inevitably going to come into contact with your people at some stage. People's attitudes are conditioned by their experience. When we are subjected to poor customer service, we make judgements about individuals, but we also make judgements about the business from which we receive the poor service. We need to ensure that our people's experiences are borne out of feelings that the job they do is worthwhile, create a sense of having made a difference, of achievement and respect gained for a job well done. That virtuous circle is the one from which excellent customer interactions are borne.***

Focusing on the processes that make the difference
***What is the optimum process design for your organisation and what levels of performance are required from your:***
- ***Process for customer enquiries***
- ***Process for customer purchase***
- ***Process for delivery***
- ***Process for payment***
- ***Process for managing complaints***

***This Active Learning Day pulls together best practice in terms of strategy and direction, empowering your people and process design to provide a comprehensive approach to the issue of customer service, allowing delegates quality time to begin to focus on your own situation and begin the process of improvement.***

Outline of the workshop
- ***Why customer experience matters***
- ***Establishing a clear business approach to customer service***
- ***Establishing a best practice approach to measurement, analysis, planning and response***
- ***Developing customer communications, managing customer complaints and turning them into opportunities***

***• The way forward***

Benefits of attending
***• Raising energy for customer service internally and externally***
***• Developing a proactive approach***
***• Understanding what is important and the processes required to drive excellence***
***• The steps and sequence involved in building a programme***
***• How to make a real contribution to the business through excellent customer service***

*Building a Customer Culture*

A step by step approach to putting customers at the heart of your business

Over the last 10 years there has been a lot of talk about CRM (Customer Relationship Management) and many organisations have implemented long and painful change programmes as a result. However, the majority of these have focussed much more on the systems and processes for dealing with customer contact, rather than the underlying culture of the organisation. Senior executives are now starting to realise that to gain real sustainable results, you need to get the buy-in and involvement of all employees to the new strategy – just saying 'we are customer-focussed' does not make it so

This Active Learning Day will guide you through a robust and practical approach to designing and embedding a customer-centric culture within your organisation. It will provide you with a set of tools and techniques that can make the process straight-forward, and suggest implementation steps to promote successful embedding of the changes required.

This Active Learning Day would be of use to anyone who has a responsibility for customer strategy and/or culture change within their organisation

**Outline of Day**

Topics covered during the day will include:

- Motivation for Change – putting customer care into context
- Understanding Customer Requirements / Desires
- Assessing Current Culture of Organisation
- Designing Desired Culture to meet customer / employee needs
- Identifying Gaps and planning projects
- Employee Engagement Programme
- Employee Development Programme
- Processes and Procedures to support the culture

- Managing the change programme

**Benefits - delegates will leave:**

- Understanding the process of designing a new organisational culture
- Able to design and implement a customer care strategy
- With a set of tools and techniques to create and embed a new culture

## *Case Study 2 – Arval PHH*
## *A five-day Management Foundation Programme for First Line Managers*

This programme was designed and run by Steve Hurst for a client who had a large number (over 200) managers across the country, who needed a foundation in basic management skills.

This decision was reached following a series of training needs analysis workshops were carried out in various locations which identified some key gaps in management capability and a perceived lack of clear progression / career paths for those in management roles

The objective of the Management Development Programme was to:

Develop effective managers who deliver exceptional customer results, through people processes and projects.

*Steve worked closely with the Learning & Development team at the client to design a programme that covered all the main areas identified, provided ample opportunities to practice the skills they were learning and met the above objective*

The pilot was so successful, that this programme was run every month for well over a year, with a mix of delegates from different parts of the organisation. Numbers on the courses ranged from 8 – 15.

An outline of the programme contents is detailed on the next page. As you can see, this programme also included a degree of pre-work

# Outline of Management Mastery Programme

| Day 1<br>Manager as Coach | Day 2<br>Manager as Leader | Day 3<br>Manager as Doer | Day 4<br>Manager as Facilitator | Day 5<br>Application |
|---|---|---|---|---|
| *Prior to the programme each delegate will have completed a questionnaire from a variety of sources that will enable them to become focussed on areas of development from this programme.* | **Leadership**<br>• Role of Management<br>• Leadership Attributes<br>• Your values & company<br>• What's leadership (E)<br>• Kouzes & Posner<br>• What Motivates people?<br>• Situational Leadership SLII (Q)<br>• SLII applied (E)<br>• Adair Model<br>• NLP (Iceberg)<br>• What do you need? (E)<br><br>**Team Building**<br>• A team challenge (E)<br>• De-brief<br>• What makes a good team?<br>• Building process FNSPM (E)<br>• Team Characteristics (E)<br>• Dealing with the difficult! | **Influence Impact and Conflict Mgt**<br>• That's life…<br>• Push & Pull<br>• Thomas Kilman (Q)<br>• The Good & Bad (E)<br>• Authentic Power<br>• Cycle of ignorance<br>• Powerful Communication (E)<br><br>**Delegation & Empowerment**<br>• What is delegation?<br>• Process to … (E)<br>• Do's & Don'ts<br>• Checklist<br>• What is Empowerment? (E)<br>• In an Organisation<br>• Six Steps to!<br>• Where's your influence? (E)<br>• Best of both worlds | **Effective Meetings:**<br>• Exercise to start (IAS assess)<br>• Meeting Dynamics (E)<br>• Typical approach to meetings<br>• Interventions<br>• IAS (Huthwaite)<br>• Exercise to end (IAS assess)<br><br>**HR Policies & Procedures**<br>(using short syndicate based exercises to bring out the learning and approach to various management challenges) incl…<br>• H&S<br>• Recruitment & Selection<br>• Appraisals<br>• PIP<br>• Absenteeism<br><br>**Final preparation** | 4 (actors) scenarios 3 groups of 4 – so each individual has to address one issue 'live'<br><br>30 min role play<br>20 min de-brief<br>Video and feedback given to delegate to take away.<br><br>Commitments<br>Next steps<br>Summary & Close |
| **Hopes & Fears** expectations (E)<br>**Introductions & Objectives**<br>**Coaching:**<br>• Types of delegates<br>• Action Inquiry<br>• Learning Styles (Q)<br>• What is Coaching (E)<br>• Myth & Fact<br>• Roles of the Coach<br>• The Contract<br>• A structure (GROW)<br>• The Body<br>• Blocks to Performance<br>• Performance Management<br>• Heron Interventions<br>• 35 Ways to Develop<br>• The Review<br>• Feedback<br>• Process to Confront<br>• Your Turn? (E)<br>**Learning Set**<br>• Introduction | | | | |
| LEARNING SET Start up<br>1 – Setting-up the learning contract (time line) | LEARNING SET Activity 1<br>2 – based on increasing choice of approach | LEARNING SET Activity 2<br>3 – based on solution strategies | LEARNING SET<br>4 – Final Preparation (HR Questions) | |

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## *Case Study 2:*
## *Merger between Smith Kline Beecham and Glaxo Wellcome*

## *Using the Cultural Web and Future Workshops*

Glaxo Wellcome had 4,500 UK commercial staff and Smith Kline Beecham 5,600 UK commercial staff. They were many different approaches and different management formats across the two organisations prior to the merger. Lots of people were leaving and there was a feeling of 'Integration apathy'. No one really knew what was happening and were concerned about the impact on them and their jobs – as they say "the misery of uncertainty is greater than the certainty of misery"

The approach that was taken was to use the Cultural Web as the basis for designing the new culture. The process followed was to set up a series of 'Creating a Destination Workshops' with a mix of employees, ranging from 20 to 250 people at a time, to ensure maximum exposure for the process.

The workshops were facilitated to ensure a cross mix of thoughts, ideas and desires and centred around the concept of 'Postcards from the Future'. Each attendee was asked to write a postcard to their CEO imagining it was 12 months in the future. The postcards started with the following statement: "Dear Eddie. Working here at GSK is great because …"

Feedback was very positive with people talking about inclusion and influence. The process took 7 months from start to finish. The output / results were collated and used to centre the paradigm of the Cultural Web. These were utilised to influence policy, procedures and approach, provide starting point for new teams and departments and therefore build the 'petals' of the Cultural Web

The measure of success was that in one year's time, they would be able to look back and see how close they were from the stated intention. The Cultural Web created through this process, is as follows:

**Paradigm**

- GSK a winning team
- Pride in what we do
- Authentic
- Stimulating & Supportive
- Simple
- I make a difference
- Outward looking
- Nimble

**Power**

- Non political
- Empowered
- No pointless escalation
- Customer driven not brand driven
- Sits with the right individual
- Know your role/know your goal

## *Case Study 2 contd … /*

**Stories**

- People want to join us
- We made a difference
- We made it happen
- We are always ahead of the game
- I am able to be me, where I am listened to and valued
- We haven't always done that way

**Symbols**

- High energy and fun
- Strong brands- logo on everything
- Open door- open plan
- Internet access/ wider use of intranet
- Diversity in people/approach/dress code
- Visible measures around buildings - sales thermometer
- No. of patients receiving our products
- Share price

**Organisational Structure**

- Understandable
- Less hierarchical
- Fit for purpose
- Cross functional/project teams
- Clarity on value added by role
- Feeling of being in a small business

**Controls**

- Clear and transparent processes that link to strategy – meaningful for all.
- Career development and personal development for all
- Performance management: clear, consistent and fair
- Driven by key measures
- Continuous improvement
- Clear decision making frameworks

**Routines**

- Communication is appropriate timely and 2 way
- Ops planning is fast and non bureaucratic
- Reward and recognition for all
- 360 degree feedback / No hidden agendas
- Share learning/best practice
- Temp checks/attitude surveys
- Fun
- Reward and recognition for all
- Creativity and innovation is encouraged

# *Case Study 3: Royal and Sun Alliance*

### *Culture Change Using OCI and the Leadership Excellence Model*

Following the merger of Royal Insurance and Sun Alliance in 1996, the new Board of Directors identified a need to develop a cohesive culture across the whole business to support the restructuring of the company around its key processes.

The existing culture was fragmented, reflecting the historical and geographical diversity of the business, but the new organisation required a set of common tools, methods and behaviours if it was to deliver more then the "sum of its parts".

OCI was selected as the tool to both diagnose the existing culture(s) and to define the desired culture. Its main attractions were the fact that it provides hard, numerical data thus enabling progress to be tracked objectively, and the visual accessibility of the "circumplex" profiles. A "target" OCI profile was agreed as part of a 3-day directors' workshop (using the OCI questionnaire to identify desired behaviours in the new organisation) and baseline culture profiles produced for all the main subdivisions of the company.

This exercise produced a quantified "culture gap" which could be presented in a single image – an effective "call to action" for culture change across the company.

The programme of behavioural change to address this gap concentrated on "leaders" – not just senior people, but everybody whose role gave them some influence over the actions of others. It was built around the Leadership Excellence Model devised by Graham Hawke from EFQM business Excellence principles. A programme of workshops was deployed across the company, supported by an in-house consultancy resource, but owned and led by leaders themselves. The focus was on peer review of behaviours, personal effectiveness skills and team-based improvement techniques applied to real-life processes.

Among other things, the programme required that each leader (including directors) would identify and adopt at least 1 personal behaviour change objective alongside their "traditional" business objectives. Monitoring of progress against these objectives was high-profile, transparent and not without discomfort for some people (behaviour change is difficult…). The programme continued for over 3 years and subsequent OCI measurements confirmed what everyone could perceive for themselves – that a significant culture change had been achieved.

In recognition of these approaches, R&SA UK Life won the North West Excellence special Award for Leadership in 2001.

Throughout this period, Graham Hawke was the senior internal consultant supporting the R & SA board.