



KLR Consulting

Inspiring Success in Your Leaders and Teams

CAL Insurance | Success Story

Diane Beatty heads the Private Client Services division for CAL Insurance. She and her team focus on ensuring that families get the insurance they need to keep themselves and their investments safe.

Growing the Team

Diane's small team was growing, yet the last several hires had not worked out for one reason or another. On top of that, onboarding a new person, fitting them into the team, and acclimating them to the team's culture had become even more difficult with the remote requirements of 2020 and 2021.

With the workload growing, Diane needed to figure out what was going on, and identify new people who would blend with the team. Based on what she had seen of Kristi's skills, and what she heard from others about their successes working with Kristi, "I realized she was the one who could help."

"Kristi is such a dynamic leader, and has a wonderful way of engaging any group in an activity or discussion," says Diane.

Hiring, Onboarding, and a DiSC® Workshop

Kristi advised Diane during the hiring interview process, took the candidates through the DiSC assessment, acted as a sounding board to help in the final decision-making, and, crucially, "Kristi helped with the onboarding of the new person, from the perspective of their integration into the team."

Each existing team member also took the DiSC assessment, and Kristi walked the team through the results over a working lunch to help them all understand how their different styles communicate and interact. Everyone had a chance to learn about their own work style preferences as well as those of their teammates.

"It's been really nice for the new addition to the team to get an idea of how the rest of the team works, rather than figuring it out by trial and error over the course of six months, or a year!" Diane says. "And everyone, the new hires, the existing team members, have said that they feel more productive and efficient."

CAL Insurance

Industry: Personal Insurance

Challenges:

- Growing team
- Hiring people that fit the team
- Communication
- Need to understand each other's work styles
- Maintaining/building a strong team culture

KLR Solutions:

- DiSC assessment
- DiSC coaching
- Facilitate DiSC workshops for team
- Onboarding with DiSC
- 60-day follow up meeting

Benefits of KLR Programs:

- Improved hiring & retention
- Increased communication
- Enhanced team culture
- Enhanced customer service
- New people integrate more effectively
- Ongoing use of DiSC styles and principles

An Exciting New Toolkit (“We Can Use This with Our Clients!”)

A big moment for the team as a whole came when Kristi pointed out that they could use their newfound communication skills and behavioral awareness with their clients. Diane says, “As soon as she brought that up, people started thinking about various clients and having total ah-hah moments about some of them and how they could change the way they interact with them to improve the relationship.”

“Kristi’s ability to bring teams together is off-the-charts outstanding!”

*~ Diane Beatty,
Head of Client Services,
CAL Insurance*

Continuing Work – 60-Day Follow up

Diane is thrilled that the team has embraced and continues to use their new skills. People are communicating more effectively with each other, with clients, and with her. Using herself as an example, Diane says, “I discovered that one of my people needs a lot of detail, not just the one or two lines of instruction I was giving her. That must have been a nightmare for her, but now I know!” It helps that she had Kristi come back and do a check in session about 60 days later.

The Dream Team

Diane says, “Kristi is good at quickly identifying what the real issues are, what is causing the challenges--sometimes that's not obvious. She also has a great set of resources and tools that she uses skillfully to get discussions going, get people comfortable with being open, and start resolving the issues.”

Diane and her team have continued to actively apply the DiSC® assessment in their day-to-day work, and Diane calls on Kristi to help evaluate, hire, and onboard new team members. The team, Diane says, “Is evolving into the ‘Dream Team’!”

To learn more about KLR Consulting and how we can help you, visit our website at www.klrconsulting.com