



## KLR Consulting

Inspiring Success in Your Leaders and Teams

# Major Financial Services Firm | Success Story

Based in Silicon Valley, this firm serves a global community of clients with a variety of professional accounting and financial services. They have always embraced teamwork and fostered a people-centered environment.

## New Perspective, New Tools

Ruby, Senior L&D Associate, and Jason, Head of L&D, were both fairly new to the firm about a year ago.

As newcomers to the firm, they were looking to expand the firm's leadership development options. Ruby knew that the right behavioral assessment could provide a depth of interpersonal understanding, and tools for day-to-day use, that their current assessment lacked. She landed on Everything DiSC<sup>®</sup>, after studying other major assessments, like Hogan, the Predictive Index, and MBTI. Ruby says, "We both felt that DiSC<sup>®</sup> fit this firm best."

She continues, "People here were not really aware of what they could do with an assessment, that it could go deep into areas like motivating and delegating, and really help make their work relationships more effective and productive."

## Pilot DiSC<sup>®</sup> Workshop—Kristi is the One

After meeting with multiple vendors, Ruby and Jason discovered KLR Consulting through a referral.

"We, Ruby and I, knew after speaking with her that Kristi was the facilitator we needed. Then she met with our Employee Relations Director, who resonated with both Kristi and the Everything DiSC program, and we were off." Jason goes on to say, "We could have run this ourselves through L&D, but everyone really felt that Kristi's approach and her outside perspective would be valuable."

They had Kristi do a pilot DiSC<sup>®</sup> workshop with the managers. "I attended the pilot, and almost every other workshop," says Ruby, "and Kristi is an amazing facilitator. She wowed that first group of managers, who all immediately wanted her to facilitate workshops for their own teams."

## Firm-wide Rollout of Everything DiSC

Jason thought that getting the program rolled out to nearly 600 employees would take 2 years, but with concerted effort by Kristi, Ruby, and Jason, they managed to do it in one year.

## Major Financial Services Firm

**Industry:** Accounting/Finance

**Size:** 600+ people

### Challenges:

- Communication
- Need to understand each other's work styles
- Maintaining/building a strong team culture
- Build leadership skills

### KLR Solutions:

- DiSC<sup>®</sup> assessment
- DiSC<sup>®</sup> coaching
- One-on-one meetings
- DiSC<sup>®</sup> workshops for entire firm
- Comparison Reports
- Five Behaviors of a Cohesive Team

### Benefits of KLR Programs:

- Increased communication
- Common language to understand each person's unique work style
- Enhanced team culture
- Firm values are now in use daily
- Ongoing use of DiSC<sup>®</sup> styles and principles

Throughout the many coaching sessions and workshops, Ruby says, “Kristi always made people feel comfortable, creating a safe space for them to share. Some workshops where there was a perhaps a little tension, she would listen to everyone, find ways to diffuse that tension without dismissing concerns, and offers her perspective from the outside, which is valuable.”

### The Ah-hah Moments

Ruby points out that, “The firm’s culture was always very people-centric, yet they still didn’t have the skills to do the hard people work, like effective feedback and difficult, constructive conversations.” Kristi’s method of presenting and coaching opened people up to learning and growing. “The way Kristi facilitates and works with DiSC®, doesn’t pigeonhole people, it empowers them.”

Ruby elaborates, saying, “Kristi’s individual sessions were instrumental in opening people up to making the switch from the previous assessment to DiSC®.” Ruby found that Kristi was able to help people see the positive side of their assessment, and recognize their strengths, even when they initially weren’t thrilled with it.

Jason says, “One of the most important parts of this was the one-on-ones Kristi held with every single employee before their workshop.” He is adamant, “One-on-ones were so valuable, truly worth more than their cost. I would do them again in a heartbeat! I would highly recommend them as an effective way to make the DiSC® personal, and to encourage people to use the principles in their daily work.” The individual coaching opened the door for people to explore how to be better colleagues and leaders, and made change approachable.

Another thing Ruby emphasizes is how well Kristi made remote sessions work. “All these workshops had to be virtual, yet Kristi has an amazing ability to make us feel like we are sitting next to each other in the same room!”

### Five Behaviors of a Cohesive Team

The firm managers are asking for more, eager to go deeper, and really excited about the possibilities it presents for them and their teams. Some teams have even opted to progress into the Five Behaviors of a Cohesive Team program. This program is based on the best-selling book, *Five Dysfunctions of a Team* and powered by the Everything DiSC® assessments.

*“I am really feeling the accumulating benefit of these sessions: not only do I feel like I know people better and that I am ready to communicate better, but it genuinely seems like the tone of our conversations has evolved over the course of this time together.”*

*~ Bryan, COO*



Through the program, several teams, including the Executive Committee, have learned to work together more efficiently and effectively and become a more cohesive team. One of the things they note as especially useful is that Kristi helps them develop specific, detailed plans for improvement.

“Everyone was so hungry for this information! They are using the tools they’ve learned, and the comparison reports, like crazy.”

~Ruby B,  
Sr Learning & Development Associate

### Living Firm Values Through DiSC®

The firm has had great values since it was founded, “But,” says Jason, “until we started working with Kristi, they tended to mostly live on paper.” Jason, Ruby, and all of the executive team are thrilled to find that people are now actually living the firm’s values. Ruby says, “New people have more confidence integrating into their team. And everyone is so hungry for this information! They are using the tools they’ve learned, and the comparison reports, like crazy.”

Jason was impressed by Kristi’s breadth and depth of knowledge, with DiSC® and other tools. He says, “She easily adapts to your culture and internal language. She is thoughtful about what’s best for your specific firm, customizing everything to your needs. She has a bit of a coaching style, encouraging and nudging, and letting people discover what works for them.”

Ruby says, “Especially at the manger and partner level, people have been craving this kind of information and development. Kristi has been a catalyst, getting everyone excited about ramping up their skills.”

*To learn more about KLR Consulting and how we can help you, visit our website at [www.klrconsulting.com](http://www.klrconsulting.com)*