



## Five Behaviors of a Cohesive Team | Success Story

When Tracy, an Executive Vice President at a large financial organization, inherited her team, she found herself dealing with several issues. For one thing, the team members were formerly her peers. But perhaps more importantly, they were basically a group of people doing their own things, rather than a true team working towards team goals.

### Turning Coworkers into a Team

Tracy started by making some changes and adding some people to the team. "I needed to fill two positions, and I took a chance and put people in those roles based on their potential." They were somewhat unconventional choices, and things 'just weren't done that way here'. She continues, "So I had a group of people who at best were uncertain about this new team, and at worst had negative preconceptions about the new people – 'I don't like so-and-so; I don't trust so-and-so...'"

The existing members of the team tended to be vocal and opinionated, while the new members were a bit reserved, both naturally and because they were new to the group. Tracy knew she had to do something to help the team come together and give them a chance to succeed.

She brought Kristi in after interviewing several consultants and started the work to build a real team.

### Everything DiSC® & Five Behaviors of a Cohesive Team

Tracy's team started by taking the DiSC assessment, and Kristi walked the team through the results in a retreat setting to help them all understand how the different styles communicate and interact.

This was a great lead in to the Five Behaviors of a Cohesive Team. Tracy felt that the core components of the Five Behaviors model, Trust, Conflict, Commitment, Accountability, and Results, were exactly what her team needed to develop, if she could get them to buy in. People were wary and skeptical at first, not opening up or being honest

"Then," Tracy says, "We had some employee engagement survey results that weren't great." That resulted in the entire team receiving a dressing down.

Floored and demoralized, the team wanted to know if Tracy was going to stay and work through this, or if she was going to leave. "I told them that I would stay, but only if they would commit to becoming a real team and to trusting and visibly supporting one another."

### Major Bank

**Industry:** Financial / Banking

#### Challenges:

- Team leader promoted from within the team
- Needed to learn to work as a team
- Incorporating new people into the team
- Communication & listening skills
- Need to understand & appreciate each other's work styles

#### KLR Solutions:

- Everything DiSC Management Assessment
- Five Behaviors of a Cohesive Team Assessment
- One-on-one interviews & coaching
- Facilitate Five Behaviors workshops & learning
- Follow up Five Behaviors reports & workshops to keep the momentum going

#### Benefits of KLR Programs:

- Increased communication
- Appreciation for teammates' skills
- New people integrate more effectively
- Better understanding of how & why teammates do what they do
- More focused on team goals



### Doing the Work: Kristi's Style

"Kristi is really authentic and she knows how to push you just enough to keep you engaged but not so far that you shut down."

Kristi spent a lot of time one-on-one with each team member before the workshops, so she was able to get a good sense of where everybody was coming from. That helped get each person prepared, and allowed her to tailor the sessions. Tracy offers an example, saying, "There was one person on the team who was very dismissive of another member. He had made up his mind that she had nothing to offer the team, based on pretty much nothing. So, Kristi paired him with her during the workshop, and he actually came to me afterwards and told me that he now understood her value and why she was on the team!"

*"We worked with Kristi for over two years, and she made a huge difference. With Kristi's help we learned how to shift perspective, trust each other, and become more a 'real' team."*

*~ Tracy,  
Executive Vice President,  
Major Bank*

She made it safe to do the work. Kristi took the team through exercises where it was safe for them to go a little further. She made it a little fun. She was adept at using humor to diffuse situations that got a little tense or heated. Kristi also gave the team homework, "...And," says Tracy, "she was great with follow-up. She kept us accountable, and was just hands on enough to keep us on track."

"Kristi did a good job understanding what we were trying to do, helping us diagnose individually and collectively what the broader issues were, and then

creating a game plan that we could all buy into." Tracy continues, "She didn't come in and say this is what we'll do because it's what I do with all of my clients. Rather, she spent a lot of time understanding why we engaged her, what we wanted to accomplish, what our goals were, and then designed the facilitation around that understanding of our individual and collective needs."

### Results: New Perspective, and a Desire for Change

"We called on Kristi's talents over the course of two-plus years, and she made a huge difference. We changed how we handled meetings, how we had our teams interact, how we showed up for team meetings and broader group meetings, and how we showcased our work and ourselves." The group worked to change not only their team, but also the views and perceptions of people across the group. They started out siloed, but they ended up breaking down barriers and reaching out.

Tracy is proud of how far the team came. "Kristi is so passionate about the work she does, and it shows in the effect she has on her clients!"

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