



KLR Consulting

Inspiring Success in Your Leaders and Teams

Swett Wealth Management Group/UBS | Success Story

The Swett Wealth Management Group of UBS provides comprehensive financial planning and asset management to high-net-worth individuals and their families.

A Tight-knit Team

Jeff Swett, Managing Director, CFP®, CRPC® and his team have been creating customized retirement plans for individuals and families, for many years.

One of the things that helps to keep them effective as a team is periodic team development.

Jeff says, "It's important to go through some team development exercises now and again to make sure that we are on the same page and to improve our communication skills."

Leveling up an Already Great Team

Jeff was aware of Kristi's programs with KLR Consulting, so when he was ready to do some teambuilding, he reached out.

"A big part of my job as Managing Director is to make sure our team is running well and that everybody is happy with their situation."

Jeff and Kristi decided that a team retreat using the Everything DiSC assessment was the way to go.

Everything DiSC Retreat

Kristi worked with Jeff to craft a retreat for the team, coaching each member individually on their DiSC results, then facilitating an interactive and insightful DiSC workshop.

While everyone's DiSC styles were pretty much as expected, there were some a-hah moments. The assessment identified the ways that each person likes to communicate, and how they prefer to be communicated to. It also highlighted what kinds of tasks and work each member likes to do, and what stresses them out.

Swett Wealth Mgmt. Group/UBS

Industry: Financial

Challenges:

- Team development for a long-standing team
- Need to understand each other's work styles
- Maintaining a strong team culture

KLR Solutions:

- DiSC assessment
- DiSC coaching
- Facilitate DiSC workshop for the team
- Comparison reports

Benefits of KLR Programs:

- Improved communication
- Enhanced team culture
- Ongoing integration & use of DiSC principles
- Greater understanding of how to work with each other most effectively

“This was definitely new information!” For Jeff, it made him realize that he needs to think before he speaks, and try to reach out in ways that work for each team member.

More Openness, Stronger Communication

“Having this retreat was a great way to spend quality time focusing on us and our team.”

*~ Jeff Swett,
Managing Director, CFP®, CRPC®,
Swett Wealth Management Group,
UBS*

Jeff is impressed that the team is now communicating better than before. “People who maybe weren’t quite comfortable speaking up before are feeling safe to do so now, which means that issues don’t get buried and allowed to fester.” Even though they knew each other so well, there were still some traits and preferences that had gone undetected.

He is also more alert to the situations that stress his various team members, “Now I know not to have them do that task, or take on that specific situation.”

Ongoing Application of DiSC Principles

Jeff and his team found their new DiSC-based communication abilities to be so valuable that they have continued their learning. They are using the Comparison Reports option to deepen their understanding of each other’s priorities. These compare the styles of two colleagues at a time, and are a fun, engaging and nonthreatening way to talk about the differences that can cause frustration and misunderstanding. Excited by their new tools and skills, Jeff and his team have chosen to have Kristi facilitate their group again to follow up and deepen their understanding.

Kristi is Just Great!

“Kristi has a very nice way about her. She has a good knack for facilitating conversation, leading people, but letting them speak in their own way. She provokes conversation in a very productive way. I think Kristi is just great!”

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