

Case Study – Performance Assessment Diagnostic & Improvement

Business Challenge

This company had been created as a ‘spinoff’ from a large national general insurer. As part of the transition to, and establishment of, the new structure, the organisation sought a unified basis for performance management.

- Consistent processes needed to be framed and implemented
- Information regarding existing competencies needed to be captured to align competencies with business objectives.
- Key competency gaps needed to be identified, including change management, leadership, business acumen, customer service and sales protocols.

Approach

A detailed diagnostic and mapping exercise was undertaken across the business, including:

- Capturing and synthesising data from a corporate, team and individual perspective.
- Scrutiny of past review documentation, staff feedback and tracking of development plans.
- A series of seek and learn workshops (with an emphasis on 2-way communication) were implemented measuring a range of disciplines and critical success factors. These workshops also addressed a series of advanced communication skills, including speech acts, confrontation and managing conflict, defusing defensive behaviour, concise and honest speech, principled negotiation and advanced listening.

A series of tailored and targeted coaching sessions were then provided to enable participants to build competencies based on preferred learning styles (sensory, sequential, active and visual). Identification and understanding of individual learning preferences allowed development to be individually tailored based on objectives, capabilities and experience.

Benefits

Staff satisfaction, business results and confidence recorded a lift over six months – staff satisfaction (from 57% to 74%). Business productivity (sales) increased 9% on average across regional teams. Reduced absenteeism was also noted.

- Managers reported an increase in confidence to deliver effective and objective feedback, providing a strong base for building sustainable relationships built on trust, honest dialogue and commitment to action.
- Elements created are still maintained five years after we completed our work. Emphasis remains on “a balanced” performance review process across the business units.