



BUILDING CAPABILITIES TO IMPROVE BUSINESS PERFORMANCE

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In Essence

THE CHALLENGE

Increasing pressures for improving business performance coupled with complex and turbulent environment, organizations are forced to look at ways they can build capabilities in their human capital that can help generate profitability & growth

THE SOLUTION

Implementing an Intensive structured coaching program embedded with experiential learning opportunities enabling learners to repeatedly practice and apply the learned skills in the live work environment.

THE IMPACT

Success of the intervention led to significant improvement in business performance. Coaching mindset now deeply embedded in the organizational culture enabling managers be more effective & highly productive.

“COACHING FOR EXCELLENCE”

Case of an Indian Life Insurance Company

This case discusses how SDF enabled an organization to embed a coaching culture that fostered conversations pointing towards improving performance & ensuring a sustained superior productivity & growth of branch managers. There was a tangible positive shift in the recruitment capability, performance management and productivity of its salesforce.

THE CHALLENGE

Our client – a leading financial institution in the Indian life insurance industry confronting stiff competition in the market & increased regulatory controls looked at how it could best leverage its trained human capital to improve sales productivity and maintain a profitable growth despite all odds. Changes in the regulatory environments, introduction of completely new products & consultative selling, brought focus to improvement in the business performance outcomes.

The key questions facing this firm was: how to build the right mindset, knowledge & skills in its front line leaders, what kind of program design would be most effective in bringing out this transformation and how can we make the change stick for a long time in order to reap benefits. The desirable changes that were expected out of this intervention were:

- To drive an effective performance management process that reinforces the desired behaviors
- To deeply embed an effective sales management process
- To achieve & sustain a tangible improvement in recruitment capability & sales productivity

THE DISCOVERY PHASE

The first step was to run deep, independent and objective diagnostics in the organization to identify the opportunity for improvement and set compelling goals.

The diagnostics in this phase explored various levels, processes & involved field visits in the distribution & sales channels. In-depth one on one interviews with the key stakeholders including the front line sales managers revealed that current managers had requisite knowledge on policies & procedures, but they lacked adequate skills & the right mindset. This hindered their ability to build the right set of capabilities in the teams they manage.

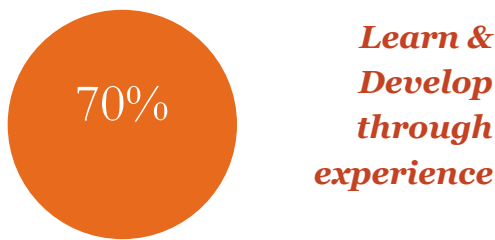
Managers spent more time executing & driving sales themselves instead of developing their teams with the desired skills & competencies to deliver high performance. Training alone was not the solution since sustained application & ongoing practice of learned skills was what was most needed. Prior training interventions done internally had limited and short lived success.

At SDF we believe that our inherent mindsets are responsible for the level of our performance. There are self-imposed constraints that arise from fear, self-doubt, lapses in focus & limiting assumptions.

The Iceberg Model

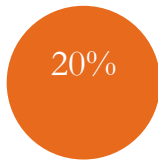


Our inherent mindsets are self-imposed constraints that arise from fear, self-doubt, lapses in focus & limiting assumptions



Learn & Develop through experience

Learn & Develop through others



Learn & Develop through structured courses & programs



Experiential Learning & Development

Addressing these self-imposed constraints through a comprehensive coaching intervention would help individuals go through a process of “**double – loop learning**”, self-reflection and challenging ones limiting assumptions thereby bridging the gap in expertise, performance or proficiency. SDF therefore designed “**Coaching for Excellence**”- a robust 90 Day intensive coaching intervention.

THE SOLUTION

The client had earlier on put in several training interventions to test, either in the form of classroom training sessions or focused knowledge sessions but all led to diminishing returns over time thus making these standalone interventions ineffective. They therefore sought external support to make the desired change stick for long & making the change sustainable by bringing in a fundamental shift in the way things were done.

“**Coaching for Excellence**” – A 90 days intensive coaching intervention was designed to overcome these shortfalls by making the engagement more personalized by way of one on one experiential learning where skills were learnt, analysed, practiced & applied over and over again in the live work environment thus enabling the learner to deeply embed these learned skills.

The entire learning process was structured around the **70-20-10 experiential learning & development model**. With extensive field observations and developmental opportunities well woven into the coaching framework, enabled the coachees to reflect and go through self-discovery & analysis thereby helping them readily change behaviours.

The Coach – Coachee interaction was structured around the following principles:

- I See, You Do
- I Do, You Help
- You Do, I Help
- You Do, I See

The client sought trained, experienced and high performing insurance specialists who had coached, developed and grown their teams & were able to transfer their skills & learning to the current managers. SDF helped the client on-board external insurance domain specialists with prior proven experience.

Before the actual coaching kicked off, all coaches were inducted by the client organization through an extensive classroom program spread over multiple days where all coaches were familiarized with the client’s context, went through the process scripts, recruitment and sales management processes.

A process of formally allocating & introducing the coachees (Branch Managers) to their respective Coach was done with the objective of breaking the ice & building a coaching mindset by establishing trust & commitment which is critical to the success of the program.

Source: Chris Argyris’s Double Loop Learning involves more than just fixing the problem, this styles of learning involves questioning the underlying assumptions behind techniques, goals and values

Applying principles of effective 'Double loop learning' – A reflection of how people think-cognitive rules or reasoning they use to design & implement their actions



Post the induction & the formal introduction of the coaches to the assigned coachees, an intensive 90 day one on one coaching curriculum was drawn out to cover all the key developmental areas for the client – Recruitment, Sales & Performance Reviews. Observation checklists, Coaching Formats, Performance review templates, Detailed Coaching Schedules for all coachees along with robust progress review and governance mechanisms were designed & put in place. During this entire intervention regular reviews were conducted with all coaches to monitor progress on key performance metrics, conversion ratios,

sales & recruitment numbers for all assigned coachees, along with the action plan for coach till the next review. All through this was a collaborative exercise between SDF and its client which was critical for the success of the program. All coaching conversations were centred around listening to the coachee, with a curiosity to understand who they are, what they think & generally how do they experience the world around them with the objective of encouraging the coachee to rise to the challenges, overcome obstacles and move swiftly into action. The effectiveness of the program was monitored using all the four levels of Kirkpatrick model of training evaluation: Reaction – Learning – Behaviours – Results.

Coach enables the coachee to rise to the challenges, overcome obstacles and move swiftly into action

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THE IMPACT

- Agent activity per branch manager went up by over 50%
- Visible shift towards demonstration of desirable behavioural patterns at workplace
- Sales productivity, recruitment activity & quality of coaching dialogues and performance review discussions displayed remarkable improvement
- The tremendous success of the program encouraged the client to replicate this intervention across multiple locations in the country

About the authors:

Rajan Kalia is the Co-Founder at Salto Dee Fe consulting and played a pivotal role in leading this intervention

Garima Dhamija (Director at Salto Dee Fe) & Nitin Behki (Head-Product Development at Salto Dee Fe) assisted in documenting this case study