

Creating a Sustainable Advantage through Team Building

Karen Ray, Susan Decker, Barry Mitsch and Rick Rocchetti

When a division's range of tasks and workload are suddenly increased, whether through expansion of services or consolidation of departments, chaos can result, with a decline in effective customer service and a decrease in employee morale. But a municipal government took steps to rebuild and reconstruct its utility services division, successfully employing a team-building process called Team Advantage.

A GROWING CITY CONSOLIDATES ITS SERVICES

The city of Raleigh, North Carolina, was recognized in *Money* magazine's 2016 report as the "Best Big City" in the US Southeast in which to live. This article references some of Raleigh's greatest features, including great schools, a robust economy, and friendly people. Other accolades for the city range from "America's Next Boom Town" to the "Second Easiest Place to Find a Job."¹ With all those articles touting Raleigh as a great place to live and work, there has been steady population growth and critical need for existing municipal staff to successfully serve this expanding customer base.

Raleigh's Public Utilities Department provides water and wastewater services for approximately 550,000 citizens living within the city limits and six of the surrounding communities in Wake County. The department has annual revenue that exceeds \$240 million. As part of the Public

Utilities Department, the Customer Care and Billing (CC&B) Division is responsible for processing the monthly bills not only for all its customers and rate payers but also for the city's Stormwater Division and Solid Waste Departments. In addition, the CC&B Division provides customer-service assistance to citizens. Within the division are myriad support functions, all designed to keep the process operating properly.

In 2015, the CC&B leadership team comprised the utility billing manager (Susan Decker), two assistant managers, a technology manager, testing manager, customer-care supervisor, and team leaders in most programs. The utility billing manager reports to a public utilities assistant director (Karen Ray), who is also responsible for internal and external departmental communications. Most of the leadership team has worked together for at least 5 years and in some cases more than 10 years.

FACING THE NEW CHALLENGES

Late in 2015, the CC&B group consolidated duties with another department, with the intention of gaining efficiency in customer interactions, improving customer-service delivery, and reducing customer complaints. This consolidation of services meant, however, that there was additional work to be done within a limited time frame and with minimal staffing increases. Staff were realigned, splitting the division into two

components—one area focused on customer service, training, and quality assurance, and the other handling the accounting, billing, technology, and testing.

Late in 2015, the CC&B group consolidated duties with another department, with the intention of gaining efficiency in customer interactions, improving customer-service delivery, and reducing customer complaints.

The Unintended Consequences of Change

The consolidation did not go smoothly. Hidden beneath the tremendous load was the underlying issue of competing priorities, with the primary response being “get the work done and don’t worry about the relationships.” There was confusion, frustration, and lack of communication, with the sense of a ticking time bomb just waiting to explode.

For instance, when the consolidated call center went live, the customer-service staff needed to learn new processes and an additional software system. Those first few months were full of “on the fly” learning moments not covered in earlier training. Also, many more calls came in than had been expected. There were numerous complaints from citizens about the messaging on the interactive voice response (IVR) system; it was confusing and cumbersome, leading citizens to disconnect early and call other departments to seek assistance. Asking customers to e-mail their questions simply shifted the queries to e-mail work that rapidly fell behind as well. Staff on other teams were asked to help, which only added to the confusion. And complaints poured into the city manager and city council offices. Something had to be done.

FINDING A NEW APPROACH

In early 2016, Rick Rocchetti, the primary organizational expert with the city, met with leaders about the CC&B concerns. That initial meeting generated the following list of goals:

- ❑ Address the issues and challenges of the merger.
- ❑ Build the capacity of the leadership team to both do its own work and address some long-standing issues.
- ❑ Balance the workload among the leadership team.
- ❑ Reorganize to better align with the intent of the merger.
- ❑ Address morale concerns of the group.
- ❑ Relieve the assistant director of day-to-day operations so as to focus on the primary responsibilities of her role (i.e., the larger strategic initiatives and business-plan action items).

Several options were considered. The guiding principle was that of building a solid team, addressing the issues, and changing the way the team saw themselves, each other, the division, and the customers. Changes would be strategic and sustainable. They would address matters of scale and speed. And they would include an element of fun, as team morale was especially low.

The guiding principle was that of building a solid team, addressing the issues, and changing the way the team saw themselves, each other, the division, and the customers.

Traditional approaches to team formation were considered along with business coaching strategies and assessment tools. In the end, the decision was made to use a proprietary team-

coaching process known as Team Advantage. Team Advantage uses elements of traditional team building but also incorporates sustainable coaching for both team members and team leaders. The method has been successfully used by call centers in other industries, and internal consultant Rick Rocchetti had been certified to apply the process.

IMPLEMENTING TEAM ADVANTAGE

Team Advantage takes place over the course of five to six months. For the Raleigh program, Rick Rocchetti served as the internal coach, and he partnered with Barry Mitsch of The Pyramid Resource Group as external coach. This internal/external combination proved valuable throughout the process and set the stage for continued sustainability.

Team Advantage consists of four phases and begins with engaging the team leader in the coaching process. For the CC&B Division, two managers were to provide one-on-one coaching, with Rick working with Assistant Director Karen Ray and with Barry working with Utility Manager Susan Decker.

Phase 1 was an assessment of the team, including confidential interviews with all team members. Barry and Rick conducted the interviews and developed a summary detailing interview themes that was shared with Karen and Susan.

As part of Phase 2, the theme report was then shared with the team at the off-site kickoff workshop. Rick and Barry facilitated the event, with the team engaging in many honest and somewhat contentious conversations. For example, it had been discovered that there were nonproductive team dynamics getting in the way, with

individuals feeling marginalized and not respected by their teammates. During the kickoff days, they successfully created a team charter and developed a comprehensive "game plan," a unique feature of Team Advantage that is intended to help tie team building to concrete business goals.

The team charter listed the ways in which team members agreed to interact with one another:

- Communicate with open, honest, and positive intent.
- Communicate frequently using appropriate means.
- Share information across the organization.
- Assume positive intent.
- Respect and appreciate the work of each individual.
- Listen and are open to others ideas and opinions.
- Encourage each other's ideas and opinions
- Understand that disagreements are not personal.
- Listen deeper to identify needs versus issues.
- Ask for help when needed.
- Are accountable and responsible to each other.
- Respond/acknowledge completion or ownership of activities in a timely manner.
- Are willing to share our expertise.
- Work toward a common goal of *excellence* in customer service.

The team named their game plan "Crossing Bridges," which was a metaphor for their commitment to building new levels of communication with each other. The game plan not only focused on their goal but also provided four strategic drivers to move them

forward as a division: communication, process and roles, developmental opportunities, and living the team charter.

The team named their game plan "Crossing Bridges," which was a metaphor for their commitment to building new levels of communication with each other.

The group also assigned "points" to their game plan to be able to track progress and add an element of fun and competition to the process. Using their points method, they would award 10 points for every acknowledged action that was part of their charter. For example, one item on the charter was to "ask for help when needed." If a team member proactively asked for help from a teammate, and this outreach was recognized, the team would score the 10 points. This ongoing activity would keep the team charter front and center among the team members and would sponsor an awareness of each other that positively affected their overall communications.

Phase 3 is perhaps the most important part of Team Advantage: the coaching phase. Twelve live meetings were scheduled, with Rick and Barry using a "coaching approach" in addition to the ongoing one-on-one coaching with the senior leaders. A coaching approach is where the coaches support the leader and the team by providing individual and team coaching in service of developing leadership skills over the lifetime of the project. The idea is that by providing this type and level of support, the leader and the team will be more able to continue to apply the skills they have learned.

Phase 4 is the follow-up and continues to build on the skills and results that have been achieved. This phase has been

envisioned as integrating the tools we were using and continuing to monitor results. In addition to Team Advantage, we used Tilt (www.tilt365.com), a personality and character assessment to help the team get to know each other in a different and deeper way. Because we had identified different tensions within the team during the team-building session, we used a tool called Polarity Management (www.polaritypartnerships.com). Both tools would enable the team to both develop skills and the like and to assess progress.

The Positive Results Begin to Show

Phase 3 began slowly, with cautious optimism. There were those who already saw the small steps forward and wanted to keep the momentum going; returning to the previous way of "working together" was not an option. The team, as a whole, was more supportive of each other and they worked to sustain the initiative by taking responsibility for their actions and commitments. Indeed, the team began to see tangible results that included:

The team, as a whole, was more supportive of each other and they worked to sustain the initiative by taking responsibility for their actions and commitments.

- ❑ Roles were more clearly defined, which helped with accountability.
- ❑ Communication was happening more often, more openly, and among different groups.
- ❑ There was a common goal of improving the process, procedures, options, and solutions, which would improve service to the customers.

- The results could be measured:
 1. The team took on even more responsibility by working with another division within the Public Utilities Department to provide after-hours support, making the call center available 24/7. There was an increase in the total number of calls handled as well as the type and number of service requests/work orders initiated. The technology group completed more work in its current year than in previous years. The group closed 49 work items in the six months that they worked through this process, which was 30 items more than they had completed in the prior six months. This work output affected other staff and customers in positive ways as well.
 2. The average time to handle a customer call decreased by more the 25 percent.

The greatest improvement in the metrics could be considered to be the decrease in the average talk time or handle time for each customer call. In December 2015, the average cost per call was \$2.30 and the talk time was 8 minutes and 22 seconds per call. In December 2016, however, the average cost per call was \$1.70, with an average talk time of 6 minutes and 10 seconds—which comes down to an average savings of \$27,515 per month. That savings was largely attributed to better overall management of the workload, technical improvements to aid efficiency, and a more cooperative team effort. In fact, the savings achieved in one month practically paid for the investment in Team Advantage, with the internal/external combination of coaches.

Additional Tools in the Program's Toolbox

Midway through use of Team Advantage, the members of the team were introduced to an assessment tool known as Tilt, which helped them understand each other's strengths and challenges. Tilt identifies four quadrants based on a person's character traits: connection, clarity, structure, and impact. Nearly every member of the CC&B team fell into the connection or clarity tilt, with only one member in the impact tilt and one in the structure tilt. These findings were significant for encouraging a conversation on why and how the team functioned in its normal way. The Tilt tool will continue as part of ongoing team development.

PHASE 4—ONGOING IMPROVEMENT

The CC&B leadership team have committed to further growth both as a team and as individuals. They are also making sure that each person on the team has a voice and is heard, which they had learned through this process was very important to each member of the team. This group took a lot of risks in making themselves vulnerable to a new way of working together and, through that,

This group took a lot of risks in making themselves vulnerable to a new way of working together and, through that, found their courage to address problems in a positive way.

found their courage to address problems in a positive way. There will continue to be a strong desire to work across boundaries to improve knowledge sharing and upgrade processes. As they persist in seeking opportunities to improve, they will continue to hold the relationships with each other as important as completing their tasks.

The team is also committed to ongoing development and professional development. Rick Rocchetti is continuing to work with the team and is further expanding the use of the Tilt leadership model, as well as introducing polarity-management concepts to further the team's understanding of positive team dynamics. The team continues to revisit the charter they

developed together and make appropriate improvements in this living document that has been so critical to their success with Team Advantage.

NOTE

1. <https://www.raleighnc.gov/home/content/PubAffairs/Articles/AccoladesRaleigh.html>

***Rick Rocchetti** has consulted with all types of organizations for over 30 years. His expertise is in leadership, systems, strategy, teams, and culture. He has published numerous articles on leadership development, managing polarities, and managing change. He currently works full time for the city of Raleigh as manager of Organization and Executive Development. He can be contacted via e-mail at rick.rocchetti@raleighnc.gov. **Karen Ray** is assistant director for Raleigh's Public Utilities Department and has more than 10 years of municipal government service. Her primary responsibilities are customer care and billing, as well as managing the communications program for the Public Utilities Department. Previously, she served as the Assistant Manager of Billing and the Meters Superintendent for the city of Raleigh. She previously worked as a service delivery manager for a software company in Colorado Springs, Colorado. She may be contacted via e-mail at Karen.ray@raleighnc.gov. **Susan Decker** has nearly 20 years of leadership experience with the city of Raleigh, with nearly 17 of those years in customer care and billing, both as the assistant manager and as manager. She currently manages a diverse working group of 72 employees ranging from front-line customer interactions to complex technology applications. She started her career with the city of Raleigh in the revenue division, managing on-site and off-site payment centers, remittance processing, and collections. Previously, she traveled in the retail industry as an area manager focusing on underperforming stores to determine root causes of gaps and business processes improvements. She may be contacted via e-mail at Susan.decker@raleighnc.gov. **Barry Mitsch** is vice president and cofounder of the Pyramid Resource Group, a corporate coaching company based in Cary, North Carolina. Barry has been involved with training and development activities for over 25 years and has designed and implemented classroom and virtual training solutions. Barry is the coauthor of the Team Advantage program and has worked with dozens of teams across a variety of industries in successfully using the Team Advantage process. He can be contacted via e-mail at barry@pyramidresource.com.*