

## **Case Study: Improving Partnership Collaboration, Cooperation and Performance**

**Company: Insurance Brokerage Agency**

**Focus: Maximizing Strengths and Improving Dynamic of Partnership for Improved Decision Making**

---

### **The Challenge**

Two partners owned an Insurance Brokerage Agency. After a period of particularly fast growth, they started to implement extensive and dramatic changes in an effort to support the growth. They brought in new Managers, separated the various insurance departments, and hired many new telemarketers. Instead of improving performance, the changes resulted in decreased sales. The partners reacted by trying new changes, including instituting new policies, buying lists and investing in training that didn't work. While they weren't losing money, their profitability continued to decline.

The KCI consultant focused on the dynamics of the partnership and the resulting impact on decision making and running the agency. Dan was the main decision maker. John tended to go along with Dan's decisions, but became less comfortable with his more passive role in decision making when their initiatives didn't work. He wanted to slow down and evaluate their choices moving forward. The differences in their style and approach became divisive when the business situation most needed them to collaborate. Dan had a more intuitive, "jump to action" approach. John wanted to be more prudent—plan, assess and make decisions based on facts and studies. He became so cautious that he kept them from moving forward. Communications became strained and neither trusted the other to lead the direction of the company.

### **The Solution**

A certified KCI consultant completed an in-depth diagnostic, which included interviews and the Key Change Solution Assessment™. This process identified the Key Strategies (highly effective emotional and cognitive response patterns) that the two partners were missing in their dynamic, and that they needed to achieve their desired results. We focused on giving each of them what they needed while still meeting the needs of the business. Specifically, we guided Dan and John to acquire the ability to be open to build on each other's strengths and bring their talents together.

### **The Results**

The two partners acquired the Key Strategies that allowed them to both maximize their individual values and strengths yet accept their own limitations. The acquisition of the new Key Strategies allowed them to create balance between them, resulting in the ability to make decisions that better served the business. After completing the process they were able to learn to listen and ask questions. They then were able to quickly institute changes that were well thought out and based on the specific needs of their business, positively impacting profitability.