

# Case Study

## Using the *Team Dimensions Profile* with an Accounting Firm

The quest for creative solutions and innovative results often drifts into dangerous territory. For every clever breakthrough or improved system, there are countless missteps, backfires, and flat-out disasters.

Recently, the leaders of an international accounting firm came up with what they believed to be the perfect way to bring new employees up to speed, provoke original thinking, and develop a company-wide sense of teamwork. There was only one small problem: Their program was a mess.

“There were high levels of competition, lots of stress, and real anxiety about coming up with the best, most creative ideas,” says Tom Sullivan, of Professional Growth Associates. “And management was unhappy with the quality of the program’s solutions.”

The organization had set up the program to be an eight-month training ground for new accountants. Employees were placed on development teams with the task of designing innovative solutions for clients. The company-wide program even ran in foreign offices. Despite the considerable energy invested in the program, however, the firm’s leaders saw only lackluster results.

Sullivan was asked to help improve the teams’ performances. Before he proposed any changes, however, he needed to know what problems afflicted the workers. He soon discovered that most of the teams suffered from interpersonal tensions and low morale.

“The team members would have this initial excitement,” Sullivan says. “But morale decreased over time, and people would just withdraw.”

In addition, most of the teams fell into one of two categories. There were those teams that would take the first solution presented and run with it, regardless of quality or feasibility. These team members often didn’t want to rock the boat by rejecting anyone’s ideas. Sullivan saw that they obviously didn’t feel comfortable presenting or debating concepts, so their solutions were bland in a painful effort to avoid conflict.

The other type of team would constantly brainstorm and critique ideas without getting anywhere. These team members would waste time by generating and refining solutions, always moving in a circle rather than toward completion.

Sullivan believed that there were several reasons for the teams’ difficulties. Foremost was the team members’ lack of knowledge of proper roles. They had no idea of their individual strengths or weaknesses, and they were unaware that their teams were imbalanced. Furthermore, some members were intolerant of colleagues who made unique contributions to the team.

“Two or three members would usually dominate the group,” Sullivan says. “In one case, team members didn’t understand a colleague’s strong Refiner drive. They didn’t like her punching holes in ideas. It caused a lot of stress.”

The teams were in chaos, lost without a model for how group work should progress. Often, they simply had no knowledge of what should happen next. To clarify matters and get employees on the right track, Sullivan introduced the groups to the *Team Dimensions Profile*.

“The goal was to improve the teams’ solutions,” Sullivan says. “*Team Dimensions* is important to that process because it helps people develop awareness of their roles and be comfortable with them. And the profile also helps teach the value of other roles.”

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Before Sullivan could get to work, however, he had to convince the firm's management that he had picked the right tool. So he had the organization's leaders take the assessment, which personalized the instrument for them. The management team quickly saw the profile's applications, and they appreciated the *Team Dimension Profile's* cultural neutrality.

"The company needed a single product that would be acceptable in 18 different countries," Sullivan says. "And *Team Dimensions* fits that."

Another selling point was the ease of delivery offered by the EPIC version of the profile. This was crucial because the logistics of international training had to be as efficient and reliable as possible. Massive amounts of paper would not do.

"If they needed 200 profiles in Greece the next day, I could email them the codes immediately," Sullivan says. "That was a big plus."

Convinced of the assessment's potential, the management team had Sullivan integrate his solution into the next round of the company's training program. A group of internal trainers at the various offices administered the profile to the new employees.

Expectations were high for the latest incarnation of the firm's training program. Fortunately, the influence of the *Team Dimensions Profile* was soon apparent.

"The profile gave the team members a way to talk about problems before they came out as attacks," Sullivan says. "They finally had a common language to describe issues."

Team members reported a sense of relief at knowing their roles. Their increased confidence and lower stress levels helped the teams work together more effectively. Sullivan adds that the knowledge that other roles existed on their teams led participants to establish a community of acceptance. He says they became more tolerant of those with different preferences or skills.

"The previous group had believed that diversity equals adversity," Sullivan says. "The new group knew that we all approach work differently, and that's fine."

The insights that the *Team Dimensions Profile* provided were valuable for participants, who increased their morale and their commitment to the training program's goals. In addition, the Z-Process model helped team members become more focused. They avoided going in circles or getting lost on unnecessary digressions, as the previous program's trainees had. Sullivan says the participants understood what each group needed before moving on to the next step.

"Team members asked, 'Are we advancing now or are we refining?'" Sullivan says. "They shared their results, laughed with one another, and recognized the strengths of the different roles."

Obviously much happier in their work, the participants had less tension and fewer conflicts within their teams. In turn, this allowed creativity to prosper, and the participants felt that they had more freedom to innovate. As a result, the quality of the teams' solutions increased dramatically.

However, the real proof of the program's revitalization was the reaction of the management team. The firm's leaders were thrilled with the new teams' results, which they hailed as a vast improvement over the previous groups' efforts. Sullivan says that the *Team Dimensions Profile* is a big reason for the turnaround.

"The profile helps people learn to work from their strengths," Sullivan says. "People say, 'This is my role, and it's ok.'"