

## Operations Training Communication Skills

---

**Purpose:** Improve the communication skills and abilities of service personnel. Overall objective is to provide awareness of personal responsibility of communications as well as give tools to help with better communication.

**Preparation:** None

---

**Facilitator:** Begin the session by stating the name and purpose of the session. Then, break them up into small groups of 3-4 people.

Give the groups the following scenarios (groups should have at least 3 scenarios and they can be the same as other groups) and ask them to answer the following questions:

1. Who?...
2. Needs to know what?...
3. By when?
4. Why?

### **SCENARIO NUMBER 1:**

You receive a cancellation notice for a client. The client calls you and tells you they received the notice. You will have additional markets to go to for this client, but it will be a difficult placement.

### **SCENARIO NUMBER 2:**

The service group makes a decision to change some processes with the operating procedures for how we do client renewals. This will have an impact on Account Managers and Producers.

### **SCENARIO NUMBER 3:**

You are trying to get renewal information from the client. After three calls, you cannot get a return phone call or a response through email.

**SCENARIO NUMBER 4:**

You know you have a doctor's appointment that will take a large portion of the day in the near future.

**SCENARIO NUMBER 5:**

You go to a carrier training and learn some new coverage issues as well as some technical information about working within their systems (web site).

**Facilitator:** Get feedback and answers from the group on these items. Ask them to explain how these scenarios play out and clarify who should know what, by when.

Ask the group what kinds of things do we tend to not communicate very well as a company?

Ask the group who is ultimately responsible for communication? The answer is EVERYONE!

Get a commitment from everyone that they will recognize the importance of frequently asking WHO needs to know WHAT by when.

Key times to remember:

1. At any meeting conclusion, this should be the big question you ask (who should know what by when?)
2. Any time a client is impacted.
3. Any time someone goes to training.

THEMES:

1. Communication is your responsibility.
2. Who needs to know what by when?

### **SOME CLOSING COMMENTS (IF YOU CHOOSE):**

The number one issue in almost every company in the world is communication. The blame is always placed on leadership and management. And... they are correct... but not completely correct.

The blame is on ALL OF US. Communication is not something that can be delivered as a process or a mandate. It can't be perfect either.

What it takes to be a great communication company is the following:

1. Everyone has to take ownership of it.
2. Intimacy and relationship improves communications
3. Thinking of the following:
  - a. Who
  - b. Needs to know what
  - c. By when
  - d. ... should be how you end every meeting and every activity!

But, if you want to improve communications, you need all three of the things listed above: Take ownership yourself and don't blame others. Look for ways to get to know each other better. Who, what, when!