Trish Robinson attended the General Manager Program at Harvard Business School. There, she was introduced to Leading Change & Organizational Renewal (LCOR) concepts. She returned to her organization with Solving Today’s Problems, the first CD-ROM in the LCOR four-module series.

Robinson wanted to expose her team to the problem-solving process and the Congruence Model framework featured in the course. At a time when the company needed to differentiate itself by service delivery, she knew that her group must transform itself from a transactional customer service organization to a provider of customer care. Robinson's group includes over 900 employees who support the life insurance, annuities, and disability income insurance businesses at Mass Mutual.

Robinson's leadership team had recently been through the process of benchmarking model customer care providers. Internally, they had collected data from "voice of the customer" surveys and interviews with key stakeholders, and they had just formulated their new vision and strategy. Eager to set priorities for 2003, Robinson wanted to use the LCOR problem-solving approach to solidify their plans for action.

First, Robinson held a meeting with her chief of staff and seven direct reports. She shared the CD-ROM with the team and taught them the Congruence Model. They then committed to bringing together a team of fifteen leaders who had been involved in the earlier customer care vision and strategy work for an offsite to work through their performance gaps and priorities.

In preparation for the offsite, Robinson and her chief of staff used the CD-ROM and followed the action steps in the workbook. They incorporated the data they had already collected into the appropriate places in the workbook steps, and put together an agenda for a one-day workshop. Critical to running a successful workshop was having already done their homework on vision, strategy, and goals. They also identified their most pressing performance gap. With the data and performance gap in hand, workshop participants were able to keep moving at a fast clip through the process.
Robinson’s agenda looked like this:

**Workshop: Customer Care Strategic Development Session**

Objective: To articulate the vision and strategy, and determine priority action areas to fulfill the vision.

Pre-work: Every participant read the SMA case summary the night before the workshop.

8:30   Gunfire at Sea/Opening Remarks
9:00   Setting Strategic Direction: Customer Service’s Vision and Strategy
10:45  Gaps
11:30  Root Causes
12:00-1:30  Working Lunch, Report on Root Causes
1:30   Culture
2:30   Action

By the end of the workshop, the group identified six key areas of focus for the year. Robinson assigned an executive sponsor to each issue. In the weeks following the offsite, each sponsor convened a cross-functional team to develop short- and long-term goals for their priority area. Robinson’s plan is to review and endorse these proposals.

Subsequent to the workshop, Robinson also held an “all managers” meeting with over eighty managers in her organization, where she shared the vision, strategy, and priority areas for the organization. In an effort to cascade her message to the other 800+ associates in her group, she created a video containing highlights from her talk and posted it, along with her slide presentation, on the company intranet.

Robinson and her team have incorporated some of the LCOR language and concepts into their presentations, data gathering efforts, and problem-solving approaches. When asked about the usefulness of the digital resources, Robinson responded, “It was a fantastic means to share a learning experience with my broader management team and to take action using a multimedia tool, which made our offsite interactive, meaningful, and much more focused.”

**More information:**

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