

# THE ERIC BENSON TEAM

...turning Workforce Wellness into an asset with The Whole-Life Model...



This proposal addresses three programs:

- **Making the Leap from Buddy to Boss!**
- **Customer Satisfaction – *Face-to-Face & Over-the-Telephone...***
- **Teamwork – *It all starts with you...***

Below is a brief recap of the primary elements to be covered during each presentation based on our recent meeting. My notes contain additional items that will be weaved in, but the descriptions below will give you a feel for the direction of each program:

- **Making the Leap from Buddy to Boss!**
  - ❖ Moving from being a Front Line Team Member to being a Supervising Leader can be a real challenge. What makes this move particularly challenging is the entirely new mindset and skill set it requires. As I'm sure you are aware, when people fail to make the leap they land in limbo: neither Front Line Team Member nor Supervisor, and while there, performance falls and frustration rises...*for everyone involved.*
  - ❖ That's why our recommendation is a two-pronged approach:
    - Shifting the Mind. New Supervisors need a new view. They must learn to see the world as a Supervisor...see their position as the link between Organizational Leaders and Front Line Team Members...see the shift in expectations, obligations, responsibility, and accountability that comes with their new position...
    - Building the Skills. New Supervisors need a new method. They must learn "how" to do things as a Supervisor...communicating, decision-making, problem-solving, giving and receiving feedback are all process-based, and each of them, along with a myriad of other skills, all take on new meaning as a Supervisor...
  - ❖ This program involves 4 Half-Day Workshops and 1 Coaching Session with each of the participants, approximately 15 people, each Session is 30 – 60 minutes.

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- **Customer Satisfaction – *Face-to-Face & Over-the-Telephone...***
  - ❖ The ultimate purpose of any organization is to take care of those it serves. Ensuring that happens often requires more than a desire to help in a friendly, knowledgeable way. Sometimes it takes a special skill set to work with the difficult people that come to us for service, and those special skills require and provide confidence... *Confidence in our ability to handle whatever comes our way.*
  - ❖ That's why this program touches on 3 critical facets of Customer Interaction:
    1. Face-to-Face. When a customer walks in, we have the greatest opportunity to take care of them, but it can also be an intimidating experience. In this portion of the program, we will identify some “do this, not that” items that will help everyone stay calm and clear when meeting a customer face-to-face.
    2. Over-the-Phone. Unfortunately, many of our communication tools are weakened or completely lost when working with people over the telephone. This section will highlight the best way to stay in control of the conversation and lead your caller to a smoother resolution of their issue.
    3. Scripting for Success. “We’ve all heard it before...” Great! Since we’ve heard it before, and we’re likely to hear it again, we have the opportunity to perfect our half of the conversation. In the time we are together, we’ll capture some of the more notable difficult issues, conversations, and/or situations and illustrate how to use Scripting for Success!
  - ❖ This program involves 1 Workshop. It will be presented after regular business hours in order to accommodate the 11 participants’ schedules: 5:30 – 8:30 p.m. with food scheduled to arrive at 5:00 p.m.

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- **Teamwork – *It all starts with you...***

- ❖ There is more talk about “teamwork” than there is actual “teamwork” in the workplace today. Why is that? Is the path to teamwork so treacherous that only a few can make it? Or has the concept been over complicated? I believe the latter is true. The purpose of this presentation is to simplify teamwork by starting with its foundation: Personal Responsibility. As this presentation unfolds, other crucial elements to a team’s success will be placed upon that foundation: elements like change, professional interaction, and motivation to name a few.
- ❖ That’s why our 5 Team Building Tools make the perfect backdrop for this presentation:
  - Purpose – Why are we here as a Team? Answering this question unifies, clarifies, and serves to guide to every decision and action.
  - Position – Why am I here on this Team? This questions sparks intrinsic motivation and becomes the source of satisfaction for one’s contributions.
  - Path – What am I to do and how am I to do it? Expectations and procedures are outlined here to establish performance criteria.
  - Performance – How will I be measured and receive feedback? When you measure it, you can manage it...when you count it, you can correct it 😊
  - Progress – What happens if I fail to meet expectations? Coaching & Counseling are the choices here. Coaching will build their skills if the failure is caused by an aptitude issue. Counseling is designed to have the individual make a stronger choice in the future.
- ❖ This program involves 12 Workshops, 90 minutes in length, which will be presented at the Department level, some smaller Departments will be combined.

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## The Compensation & Scheduling:

17 Workshop Presentations

~15 Coaching Sessions

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Total Investment: \$11,470.<sup>00</sup>

- Total Investment includes the following:
  - ✓ Design, development, and delivery,
  - ✓ Material & Supplies as necessary for the people involved, and
  - ✓ Travel expenses.
  
- I am prepared to start as soon as the project is approved and to work together to identify mutually agreeable days and times that work best for those involved.

**I look forward to working with you on *anything* you find in this proposal that needs adjusting. Please feel free to contact me with any questions or comments you may have so I can meet your expectations for this program.**