

Case Study: Building Stronger Collaboration Across a Distributed Financial Services Team

Client Backdrop

The client is a **mid-sized, growth-oriented private financial credit firm** with a mix of co-located and geographically distributed employees. The organization includes **cross-functional professionals across four sub-teams reporting to a single leader**.

As the firm scaled, leadership recognized the importance of being more intentional about how teams collaborated, communicated, and navigated differences—especially across locations and functions.

The Challenge

Rapid growth and increased interdependence across roles made differences in communication styles, decision-making preferences, and work pace more visible. While performance remained strong, collaboration was inconsistent and often depended on individual awareness rather than a shared organizational framework.

Leadership wanted a **practical, non-judgmental approach** that would help employees:

- Better understand themselves and others
- Reduce friction caused by style differences
- Strengthen collaboration without slowing execution

The goal was not to “fix” performance issues, but to **create a common language** that teams could rely on during everyday interactions and high-pressure moments alike.

Our Approach

AmaLaVida designed and facilitated a **live, interactive DiSC® workshop** tailored specifically to the client’s operating environment and ways of working.

The session focused on:

- Increasing self-awareness through individual DiSC styles
- Understanding how different styles experience communication, feedback, and decision-making
- Practicing “style flexing” through structured, facilitated breakout discussions
- Translating insight into **practical strategies participants could apply immediately**

Rather than positioning DiSC as a personality label, the workshop emphasized **choice, adaptability, and intentional behavior**, particularly in cross-functional and distributed work settings.

Participants received:

- Individual DiSC reports
- Reference guides and job aids
- Team-generated style-flexing strategies captured during the session

To reinforce learning, participants received a **post-session follow-up** encouraging them to:

- Identify one behavior to change
- Apply DiSC strategies with a specific colleague
- Use the provided tools to support real-world application

Impact

Participant feedback reflected strong engagement, relevance, and immediate applicability. Average ratings exceeded **9 out of 10** across:

- Engagement and delivery
- Relevance of content
- Practical value for day-to-day work

Qualitative feedback highlighted:

- Increased understanding of colleagues' work styles
- High value of interactive breakout discussions
- Clear connections between DiSC insights and real workplace situations

Several participants expressed interest in deeper application through team conversations and manager–employee discussions, signaling momentum beyond the initial workshop and reinforcing a culture of shared responsibility for collaboration.