

Shaffer Title Uses the Myers-Briggs® Assessment to Develop Common Corporate Language, Jump-Starting Growth

A Case Study of Shaffer Title and Escrow, Inc.



CASE STUDY AT A GLANCE

BUSINESS OVERVIEW

Provides title insurance and real estate settlement services to homebuyers and real estate professionals. Founded in 1990, headquartered in Chesapeake, Virginia, with six branch offices and 35 employees.

CHALLENGE

Since the company was growing quickly, it needed a common language to help its people talk to one another—and to its diverse customer base—and wanted to improve teamwork and leadership development.

SOLUTION

Turned to the Myers-Briggs® assessment and made it a core element of its training and development program—even used type concepts to provide feedback in performance reviews. Delivered the assessment through SkillsOne.com and engaged CPP Professional Services to help with executive coaching, team building, and organizational development for the entire Shaffer Title team.

RESULTS

Has made an impact on day-to-day communications between staff members and with its diverse customers, and has helped improve productivity, resolve conflicts, and enhance job satisfaction. Shaffer Title plans to go to the next level, the MBTI® Step II™ assessment.

“Everyone is talking about it—I want to know my MBTI type too.” This statement by a new employee at Shaffer Title and Escrow, Inc., demonstrates how important the *Myers-Briggs Type Indicator*® (MBTI®) instrument is to the company. The MBTI assessment has become part of Shaffer Title’s everyday corporate culture, and it played an important role in helping the company grow from one office in 1990 to six branch locations and more than 35 employees—servicing more than 5,500 real estate professionals and title insurance consumers—today.

Founded in 1990 in Chesapeake, Virginia, by Susan and Jarett Shaffer, Shaffer Title provides title insurance and real estate settlement services to home buyers and real estate professionals. The company was created to provide a more cost-effective and efficient closing process.

At the time of the company’s founding, Jarett Shaffer was at sea, deployed in the war effort for Operation Desert Shield, part of the defensive mission to prevent Iraq from invading Saudi Arabia. Jarett wrote the company business plan while deployed, and Susan launched the company back home in Virginia. Explains Susan, “In this area of the country, only attorneys were serving real estate transactions, and they were charging a lot—up to 1% of the sale price for closing fees. This meant that many people were priced out of the market.



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We were a small family dependent on a military income, and we knew there had to be an alternative, so that more families like us could buy homes and be empowered to do so.”

The Shaffers set out to offer a refreshing alternative for real estate closings and to fill a niche they knew needed filling: creating a closing experience that was more comfortable and respectful, less threatening and expensive. While the early years were challenging, the company never wavered from its core belief that how it did business was just as important as what it did. Agents deserved to be treated as professionals, and buyers deserved to be treated with integrity and respect.

The company’s brand promise is to “close smoother with Shaffer.” The Shaffers built their company around three core values they feel are too often missing in business today: dependability, old-fashioned manners, and professionalism. Bottom line, says Susan, “When we say we will do something, we do it.”

Once the company had its customer service offering and technology perfected, it was time to grow the business by opening new branch offices. And to do that right, Shaffer Title knew it would need a common language to help its people know how to talk to one another and to its diverse customer base, as well as to improve teamwork and leadership. According to Susan, “Based on my research, I found that companies can fall apart quickly if they don’t have that ‘glue of communication’ that holds them together. Without a common language, core values and promises go by the wayside.”

THE GLUE OF COMMUNICATION

For its next stage of growth, the company turned to the Myers-Briggs® assessment—a personality inventory designed to give people information about their psychological preferences. Originally developed in the early 1940s by Isabel Briggs Myers and Katharine Cook Briggs, the Myers-Briggs assessment was created to make Carl Jung’s theory of human personality understandable and useful in everyday life. Today, the MBTI tool is the most widely used personality assessment in the world, recognized by many as the gold standard.

Susan was introduced to the MBTI tool by her daughter, who had a fascination with personality testing. As Shaffer Title began its fast-track growth in 2004, it incorporated the assessment with the assistance of CPP Professional Services consultant Shanna Teel, PhD, focusing on executive coaching, team building, and organizational development. Teel and

Shaffer Title sees the impact [of the MBTI tool] every day in communication between staff members and with its diverse customers.... Shaffer’s employees are even beginning to “type watch” customers on the phone to improve communications.

Susan Shaffer collaborated to develop team-building seminars, to be held twice a year, and introduced the entire Shaffer Title team to the MBTI assessment.

Employees completed the assessment via SkillsOne.com, CPP’s online assessment delivery system. Then at the company’s off-site training, Teel led employees through a workshop on personality type and interpreted their results. She used the analogy of rooms in a house to explain the 16 different personality types that describe people. To make her point, Teel figuratively placed each employee in a different room in the house and then explained how everyone had to be comfortable walking from one room to the next—dealing with all eight of the personality preferences: Extraversion and Introversion, Sensing and Intuition, Thinking and Feeling, and Judging and Perceiving.

Since its introductory workshop, the company has continued to incorporate the MBTI framework into its off-site programs. And throughout the year, employees use the MBTI tool on a daily basis to improve communication both internally and with customers.

RESULTS: ENHANCING PROFESSIONAL AND PERSONAL LIVES

What were the reactions? “Initially, our employees had a great deal of resistance to something they thought might pigeonhole or categorize them,” says Susan. “They wanted to know what it meant to their jobs.” In response, Susan spent a lot of time explaining to them what psychological type was all about and how it would be used ethically, not against them in any way. She assured them it would be used to their benefit.

The goal of the MBTI tool is to create an atmosphere of understanding and improved communication. It is not designed to stereotype people, or to assign good and bad

characteristics. Though many factors combine to influence an individual's behavior, values, and attitudes, the MBTI description summarizes underlying patterns common to most people of that type.

"The MBTI assessment gives us a way to describe why people do what they do," explains Susan. "We have it fully integrated into our culture now. In any area of the company, at any moment in the day, you might hear someone saying 'My Perceiving preference is off the chart today; I need to get back into focus,' or, 'I'm a Sensing type; I need more concrete information.' It has become a really valuable way for us to connect to one another. In fact, it is not a judgmental system; it is a benign, neutral way of explaining the cause and effect, or the 'why I do what I do when I do it.'"

Susan says the MBTI assessment is the perfect instrument for Shaffer because it mirrors the company's core values and provides benefits not just in the workplace but throughout employees' lives.

Susan explains, "I'm an Intuitive type, and Jarett is a Sensing type. We would come to the classic clashes of not understanding where the other person was coming from, and it was inhibiting the growth of the company. Just learning the basics of 'this is how I think, this is how he thinks, and it doesn't make him right or me right' opened up understanding. And that blossoming of perception has allowed us to do many things with and for the business."

BUILDING ON THE MBTI® ASSESSMENT

Susan has long believed that people sometimes have trouble understanding each other due to basic differences in how they take in information and make decisions about it. Once immersed in the MBTI instrument, she realized that having a clear understanding of the basics of personality type and type development would help her gain greater understanding of herself and others, and of the impact type has on daily interactions.

When the company is locked in a leadership meeting, the participants often remind themselves not to get too lopsided on the Thinking side, making decisions based solely on logic and objective analysis. They often ask for feedback from the Feeling types, who focus on values and subjective evaluation of person-centered concerns. Just as important, when they find that the Extraverts are doing all the talking, they ask the Introverts for their ideas and impressions.

How is the MBTI assessment used on a day-to-day basis? Shaffer Title sees the impact every day in communications between staff members and with its diverse customers—from first-time home buyers who have just drained their piggy banks, to empty-nesters scaling back for retirement, to real estate professionals with a range of experience levels. To ensure that the company remains true to its core values and mission—providing superior customer service, a combination of modern technology and old-fashioned standards of manners, integrity, and respect—Shaffer's employees are even beginning to "type watch" customers on the phone to improve communications.

Explains Susan, "We take the time to learn how to talk to customers in the way they want to be talked to. It all gets back to our focus on old-fashioned values and manners. If we hadn't found the MBTI tool, there would be no common language, no common pool of meaning—and a lack of cohesiveness in how we could grow those relationships."

Shaffer Title uses the MBTI instrument as a core element of its training and development program, even using type concepts to provide feedback in performance reviews. At its next leadership workshop in October 2007, the company plans to focus on developing conflict management solutions and improving productivity and job satisfaction. Impressed with the MBTI results so far, the company plans to go on to the next level, the MBTI Step II™ assessment. The MBTI Step II instrument builds on the insights provided by the Step I™ tool, introducing a unique and complex understanding of personality, which enables clients to explore a multiplicity of individual variations within type. Particularly effective in leadership development and executive coaching, the MBTI Step II instrument breaks down each dimension of the Step I types into five facets, giving individuals a more detailed appreciation of their type. This approach can highlight how people of the same Step I type can be different, and explore similarities between people with contrasting Step I preferences. This instrument will give employees more insight into their behaviors and even more clarity about their type.

Susan Shaffer sums up how the employees feel about the MBTI framework: "It has been very, very beneficial. We have received a lot of positive feedback from employees on how they use it in talking to our customers and when they are having difficult conversations. Most important, we are all learning how to talk to people so they can really hear us using type. It really does have a language around here."

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