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Evaluation of The Relationally Based "Calm-Driven" Service Training for the Automotive Industry, Based on The New World Kirkpatrick Model

Katia Tikhonravova
Nova Southeastern University, katiatikho@gmail.com

Evaluation of The Relationally Based "Calm-Driven" Service Training

for the Automotive Industry, Based on The New World Kirkpatrick Model

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Katia Tikhonravova

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Approved:

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Date of Defense

Dr. Christopher Burnett, Psy.D.
Chair

Tommie V. Boyd, Ph.D.

Anne H. Rambo, Ph.D.

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Dr. Christopher Burnett, Psy.D.

Chair

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Abstract

This study evaluated the effectiveness of the relationally based “Calm-Driven” Service (CDS) training program from the New World Kirkpatrick model perspective. The CDS training program is designed to help automotive professionals in sales and service to relate to their customers by (a) thinking in a different way about human relationships, and (b) realizing their own role in relationships and behavior. The CDS training program is based on the relational systems theory concepts of relational triangles, chronic anxiety, and differentiation of self from the Bowen Family Systems Theory.

The results suggest that the participants had a positive reaction to the training program. Specifically they found the training favorable, relevant to their professional needs, engaging, comprehendible, and capable of creating change in educational experience through time (level 1: reaction). They gained the intended knowledge, skills, attitude, confidence, and commitment to apply newly gained knowledge on the job (level 2: learning). Participants’ behavior changed in their ability to relate to their customers by being (a) able to think in defined ways, and (b) realize their own role in relationships and behavior. Notably, newly learned behaviors were maintained two months after the training program was complete due to a successful monitoring, reinforcing, encouraging, and rewarding system (level 3: behavior). The improvement of the associates’ relational skills indicates that the training helped the organization to move on track to their overall goal, which is to help the stakeholders to become the number one volume dealer (level 4: results).

Evaluation results demonstrate that relational training based on the Bowen Family Systems Theory could be successfully implemented and show positive results for the organization and their associates. Therefore, it is recommended that marriage and family therapists, as specialists in relational systems thinking, would focus future research on development, application, and evaluation of relationally based trainings.

Keywords: New World Kirkpatrick, customer service, marriage and family therapy, Bowen systems theory, automotive service, Calm-Driven training

CHAPTER I: INTRODUCTION

Instability

I was born in the USSR, a country that no longer exists. I grew up in Siberia, a colder eastern part of what is now the Russian Federation. When I was growing up, I witnessed a lot of crime and human suffering in times of the country's political instability. The USSR was falling and the Russian Federation was facing its first presidential election. In those times, all levels of authority were for sale, including public safety. People would kill, lie, and kidnap for personal gain. It was a financially difficult time for Russian workers. Employees in most professions had to wait for their well-disserved paychecks anywhere between three to six months and, depending on employer's ability and willingness to pay; sometimes they would not get paid at all (Eaton, 2004). By the time people would receive their pay, a rapidly growing inflation would heavily devalue their money. People were hungry, scared, confused, and dependent on authorities, which brought great distress for everyone.

My mother tried to create financial and social stability for our family by engaging in entrepreneurship, something that was not encouraged or welcomed by USSR's political structure. As a family, we would travel out of town to buy chicken eggs in bulk, between 180 and 720 eggs at one time. Then, we would sort those eggs into different categories and sell them to our neighbors at different prices based on the eggs qualities, such as size and color. In the fall, we would also sell home grown potatoes from our small farm. Sometimes business was very rewarding. For instance, we were one of the first families in the neighborhood who purchased a home computer and connected it to the Internet. Other times, it was stressful and even scary. In order to run a nongovernment owned business, entrepreneurs had to pay a large portion of their money to the “protection” racketeers (Eaton, 2004). If they did not pay, they were in danger to be murdered (Eaton, 2004). Our family had to learn how to provide for ourselves but not to be noticed.

I remember, when business was slow, my parents would call their friends to borrow money. I remember wearing clothes that were too small and dried out. There was one week when we only had enough money to buy a loaf of bread and three one-way bus tickets for the family of four. I vividly remember being scared for our family. My mother pacified me with words, “We will figure it out.” That same week, my grandmother ended up at the hospital with a heart attack. My little sister and I used bus money to go see grandmother at the hospital. We came empty handed but she was happy to see our faces. On our way back, I was able to convince the bus driver to let both of us ride home for the price of one bus ticket. As I was growing up witnessing distress, I became committed to never see my family and myself in the situation of financial and social suffering.

It is not just one challenge that affected our lives; it was a system, which was very difficult to escape. Our family business was slow when our neighbors were too poor to buy food. Like us, they were in a financial distress. We could not ask for help from authorities because they collaborated with criminals to provide for their own families. The country was in search of guidance. The people were in search of stability. All of us were caught up in a desperation cycle in a search for survival.

Survive and Thrive

While growing up my family gave me and other family members of my generation a freedom to identify what we would like to do, where we would like to live, and whom we would love, as long as it would produce and improve the strength and longevity of the generation after us. The success of my generation and the generations before mine was determined by whether the generation was able to improve survivability for the next generation. For instance, female health and bodies were judged on the ability to bear a healthy offspring; homosexuality was viewed as a threat; and education of even one family member was viewed as a necessary tool for the financial and social improvement for the whole family.

After I received my bachelor's degree in organizational crisis management, I moved to the land of opportunities and the law—the United States of America. I moved on my own, with a carry-on bag. My English skills were very poor at that time. Yet, I knew this was a once in a lifetime opportunity to improve life for my generation and the generation after me, so I had to make it work no matter how hard it could be. I began by working as a cook. The job helped me improve my English skills and gave me time to immerse myself into a new social and political context. I was far from home but I felt safe and welcomed. I struggled to achieve financial independence. As my language skills improved, I was promoted four times during my first two years, and most importantly, I was able to secure a thriving future for the generation after me. I felt my goal for my generation was complete. Yet, my goals for my generation changed when I discovered the world of sales.

In the sales industry, success does not depend on age, race, nationality, religious beliefs, gender, sexual orientation, family inheritance, or college education (Tikhonravova & Khan, 2015). I learned that if I am persistent, motivated, and sociable in a sales environment, I could create a career that is able to bring me desired financial rewards and stability. As a sales professional, I have the freedom to create my own future. I do not have to depend on anyone and anything but myself. I set my own goals and my own limits. A sales environment provided me with an opportunity to enhance the survival for my generation and the generation after me.

The Automotive Environment

One of the main goals for the automotive business environment is to generate productivity through generation and retention of a customer base. Establishment of positive relationships with customers helps improve customer satisfaction, increases repeat business, generates referrals, increases profits, improves employee retention rates, and helps a dealership to compete in the market share (Barkholz, 2013; Beresford, 2014; Lederman, 2011; Nath, 2017; Skrobot, 2000). The automotive environment recognizes the need for improvement of relational skills among their workforce (Case, 2011). Therefore, dealerships aim to recruit, retain, and train a workforce that is able to establish positive ongoing relationships with their customers (Case, 2011).

Currently, the primary way in which owners and managers in automotive dealerships try to promote quality relational skills in their associates is by recruiting and retaining a workforce that is naturally relationally savvy (Rita Case, personal communications, April, 2017). Unfortunately, when it comes to the dealership personnel, their education is limited to in-house training, which is focused on product knowledge and sales process (e.g., Grant Cardone University; JM&A Group; Rick Case University). Additionally, associates in management positions typically hold some college education, like an MBA or similar educational programs, which would focus on the theories of business, marketing, economics, and strategic management (McDonnell & McNiff, 2014). Yet, many managers in the dealership environment obtained their position through their ability to perform, rather than their level of college education (Rita Case, personal communications, April, 2017). Therefore, many do not possess a college degree (Beresford, 2014). Dealerships are trying to close the educational gap, but when it comes to relationship building skills, dealership management rely on a sales professional's natural abilities to build and maintain positive relationships with customers (Rita Case, personal communications, April, 2017). Therefore, there is a need for relational based training that would provide dealership personnel with the necessary tools that would help them to improve positive relational skills.

My Journey in the Automotive Industry

I joined the automotive sales industry in 2009, when the US was still recovering from the 2008 market crash. Nevertheless, I made ten thousand dollars during my fourth month at the dealership. I learned something new every day and I was committed to succeed. The automotive industry brought excitement, allowed me to meet new people, and helped expand my opportunities. "The car business is one of the most rewarding, exciting, and satisfying careers in the sales industry" (Tikhonravova & Khan, 2015, p. 12). I reached financial independence but I was still motivated to grow professionally. I wanted to become the best sales person I could be.

I began to explore my strengths and weaknesses. I wondered what could make me better. I could not figure out what actually gets people to buy a car. I realized that there was a lot that I needed to learn. The dealership offered education about product knowledge and sales process, but something was still missing. I had experienced a need for relational knowledge, which I thought could help me enhance my performance in the automotive environment. I began to look into different graduate degrees in order to enhance my professional qualities. I decided to pursue a master’s degree in marriage and family therapy and then a doctorate in philosophy, which helped me understand relational patterns from a systemic perspective.

While obtaining my graduate degrees, I stopped selling cars. Yet, even after leaving my sales job, I never left my sales career. I continued to be involved in developing automotive sales promotions, community events, writing (Tikhonravova, 2016, 2018a, 2018b, 2018c, 2018d, 2018e, 2018f, 2018g; Tikhonravova & Khan, 2015), and creating training programs that would enhance the sales professionals environment. Relational knowledge can help automotive professionals to strengthen relationships with customers and among themselves, which could improve their position in the market (Lederman, 2011; Spaulding and Plank, 2007; Stock & Hoyer, 2005). I hope to bring knowledge from the field of relational systems thinking, like marriage and family therapy, into the automotive environment in order to provide missing relational knowledge. I continued to share relational knowledge in the automotive sales environment through collaborative work with automotive dealerships in South Florida. In order to expand my professional practice, I began to share automotive sales perspectives in the field of marriage and family therapy through presentations and publications (e.g., Hibel et al., 2017; Marquez, 2016a; Tikhonravova, 2016, 2018a, 2018b, 2018c, 2018d, 2018e, 2018f, 2018g; Tikhonravova & Khan, 2015).

Marriage and Family Therapy

Marriage and family therapists (MFTs) are trained in enhancing their own relational skills and the relational skills of individuals they are working with (Schooley &

Boyd, 2013). They are trained to see relational patterns from the systemic perspective and manage them accordingly to meet mutual relational goals (Schooley & Boyd, 2013). MFTs are able to engage individuals in a way that would allow those individuals to enhance their skills of managing relational intensity.

Fortunately, working with an organizational system can be much like working with the family. Marriage and family therapists have been working within organizations and have demonstrated success in such partnerships (Bell, 2008; Cole, 2000; Cole, 2013; Cole & Johnson, 2012; Cramton, 1994; Distelberg & Castanos, 2012; Engels, 2011; Jarvis, 2009; Rosenberg, 2000; Rosenberg, 2013; Thayne, 2000). MFTs are skilled to help service professionals identify, implement, and analyze relational patterns from the systemic perspective that are useful for individuals and organizations. Hence, collaboration between the automotive industry personnel and marriage and family therapists could be mutually beneficial. One of the family systems theories that had demonstrated productive application of relational knowledge in the organizational context is the Bowen Family Systems Theory (Bregman & C. White, 2011b; Engels, 2011; Marquez, 2016a; Norton, 2011; Romig, 2011; Rosenberg, 2013; Tikhonravova & Khan, 2015).

Bowen Family Systems Theory

Bowen Family Systems Theory, developed by Murray Bowen, M.D., views the family as an emotional unit (M. Kerr, 2003; M. Kerr & Bowen, 1988). Bowen introduced four theoretical assumptions and eight concepts that help explain the patterns of human relationships from a systems theory and natural theory perspective. Those four theoretical assumptions are: (1) chronic anxiety, (2) individuality and togetherness, (3) the emotional system, and (4) the family as an emotional unit (Comella, 2011; M. Kerr & Bowen, 1988). The eight Bowen theory concepts are: (1) differentiation of self, (2) the nuclear family emotional system, (3) the family projection process, (4) multigenerational transmission process, (5) triangles and interlocking triangles, (6) sibling position, (7) emotional cutoff, and (8) emotional process in society (Bourne, 2011c; Comella, 2011; M. Kerr, 2003; M. Kerr & Bowen, 1988).

Bowen Family Systems Theory assumptions and concepts are applied in diverse professional settings, including mental health, education, business, biology, religion, cosmology, and sports around the world (Baker & Titelman, 2011; M. Kerr, 2011; Kolski-Andreaco, 2011). Successful application of Bowen ideas in multiple contexts is possible because despite contextual differences in relational interactions, underneath they are emotionally similar (Baker and Titelman, 2011; Howard, 2011; Nel, 2011). Murray Bowen was focused on the emotional process in the system, while maintaining respect for individual and social values, practices, methods, and ideas (Bregman & C. White, 2011a). He believed that “one of the greatest diseases of mankind is to try to change a fellow human being” (Bourne, 2011c, p. 43). His goal was to encourage independent thinking, rather than push people to blindly follow his or someone else’s ideas (Bregman & C. White, 2011a). Bowen’s ideas are focused on natural systemic patterns of interaction, rather than concrete contextual techniques. This is why his ideas are equally applicable in mental health and organizational settings.

The Calm-Driven Service (CDS) Training Program

An introduction to Bowen Family Systems Theory helped me to manage personal and professional relationships in a more productive and healthier way. Therefore, I found it practical to expand Bowen theory application into the context of the automotive environment. To do this, I developed the Calm-Driven Service (CDS) training program, which provides a comprehensive, relationally focused training package for automotive service professionals. The focus of the training is to help participants improve relational skills through understanding and practice of systems theory through three concepts from the Bowen Family Systems Theory: differentiation of self, chronic anxiety, and relational triangles. The training package is two fold. It includes four group-training sessions and three follow up individual-coaching sessions.

Purpose of the Study

According to Aguinis and Kraiger (2009), there is a gap between applied and scholarly literature in terms of evaluating training effectiveness. Trainings can be evaluated to assess their effectiveness in terms of financial and time value, need for continuation, and to gain information about ways to improve existing trainings (D. Kirkpatrick & J. Kirkpatrick, 2006). The goal for this research study is to evaluate the CDS training program in terms of its effectiveness in providing knowledge and application of relational skills in the automotive service environment. The New World Kirkpatrick Model will be utilized to evaluate the CDS training in four levels: reaction, learning, behavior, and result.

Global Importance

Dupree (2007) asserts that MFTs, as individuals, programs, and a field, are often stuck in applying marriage and family therapy (MFT) knowledge in traditional clinical settings. He encourages application of MFT knowledge in non-traditional settings and states that much research still needs to be done in this area. This research will serve two fields of study: the MFT profession and the automotive industry. Knowledge from the field of MFT has been found to be beneficial in systems inside traditional therapy (e.g., individual, couples, and families), as well as higher education (Hargrove, 2011; R. Kerr, 2011; Lester, 2011), medical systems (Brucker et al., 2005; Fox & Sheridan, 2007; Rosenberg, 2000; Rosenberg, 2013; Williams-Reade, Freitas, & Lawson, 2014), alternative medicine (Becvar, Caldwell, & Winek, 2006), government (Fox, 2008), mediation (Wall & Spira, 2012; Wayne, 2011), social justice (Parker & McDowell, 2017; Seedall, Holtrop, & Parra-Cardona, 2014), divorce (Heller, 2013), and business (e.g., Bell, 2008; Bregman & C. White, 2011b; Cole, 2000; Cole, 2013; Cole & Johnson, 2012; Distelberg & Castanos, 2012; Engels, 2011; Jarvis, 2009; Norton, 2011; Romig, 2011; Rosenberg, 2013; Thayne, 2000). The purpose of this study is to help expand the application of marriage and family therapy systemic ideas beyond the realm of traditional therapy. This would help continue to legitimize the systemic training in marriage and family profession as diverse and applicable in many other systems.

This study will serve the field of the automotive industry by providing practical application of systemic relational practices in order to satisfy organizational goals. Enhancing automotive personnel’s ability to manage relationships could provide them with new tools and resources to address circumstances faced in everyday practices. According to Aguinis and Kraiger (2009), trainings are beneficial to the organizations as whole and social networks that they affect. Providing expansion of knowledge in both fields would benefit the individuals that those fields serve, because healthy relationships affect not only sales professionals and therapists, but also people that they are working with. In other words, working with relationally mature professionals is beneficial for therapists, sales professionals, clients and their families, as well as management and corporate owners.

CHAPTER II: REVIEW OF THE LITERATURE

The Automotive Dealership Environment

In the state of Florida, a person or organization that displays and/or sells three or more vehicles during the period of 12 months must hold a valued dealer license (Department of Motor Vehicles [DMV], 2017). The Department of Motor Vehicles offers two types of dealer license (DMV, 2017). An independent dealer may sell only used vehicles. A franchise dealer may sell new vehicles with an agreement from a manufacturer and used motor vehicles if they choose. The Florida DHSMV's Division of Motorist Services issues and regulates motor vehicle dealer licenses (DMV, 2017).

The National Automotive Dealer Association (2016) reports that there are 16,708 franchised dealerships in the United States, employing more than 1.1 million workers and reaching $995 billion in only new-vehicle sales. Additionally, according to the National Independent Automotive Dealer Association (2017), there are 25,438 independent dealerships. Most dealerships expand their business beyond selling new and used vehicles. Typical franchise dealerships are automotive retail and service providers. In addition to selling/leasing new and used vehicles, they will sell automotive parts and accessories; financial services, like Guaranteed Auto Protection insurance (GAP), service contracts, roadside assistance, extended warranties, and anti-theft devices; automotive insurance; and tag renewal. Automotive services could include regular maintenance, electronic and mechanical breakdowns, body paint, and other automotive services and products.

In order to provide those services, the dealerships employ professionals with a variety of skills and experience. A typical franchise dealership includes departments such as, parts and accessories, sales, service, and human resources. A sales department typically includes new sales, used sales, fleet sales, finance and insurance, and an internet sales department. Figure 1 illustrates a typical hierarchical structure at a franchise automotive dealership. Every department, and each member of the department, is

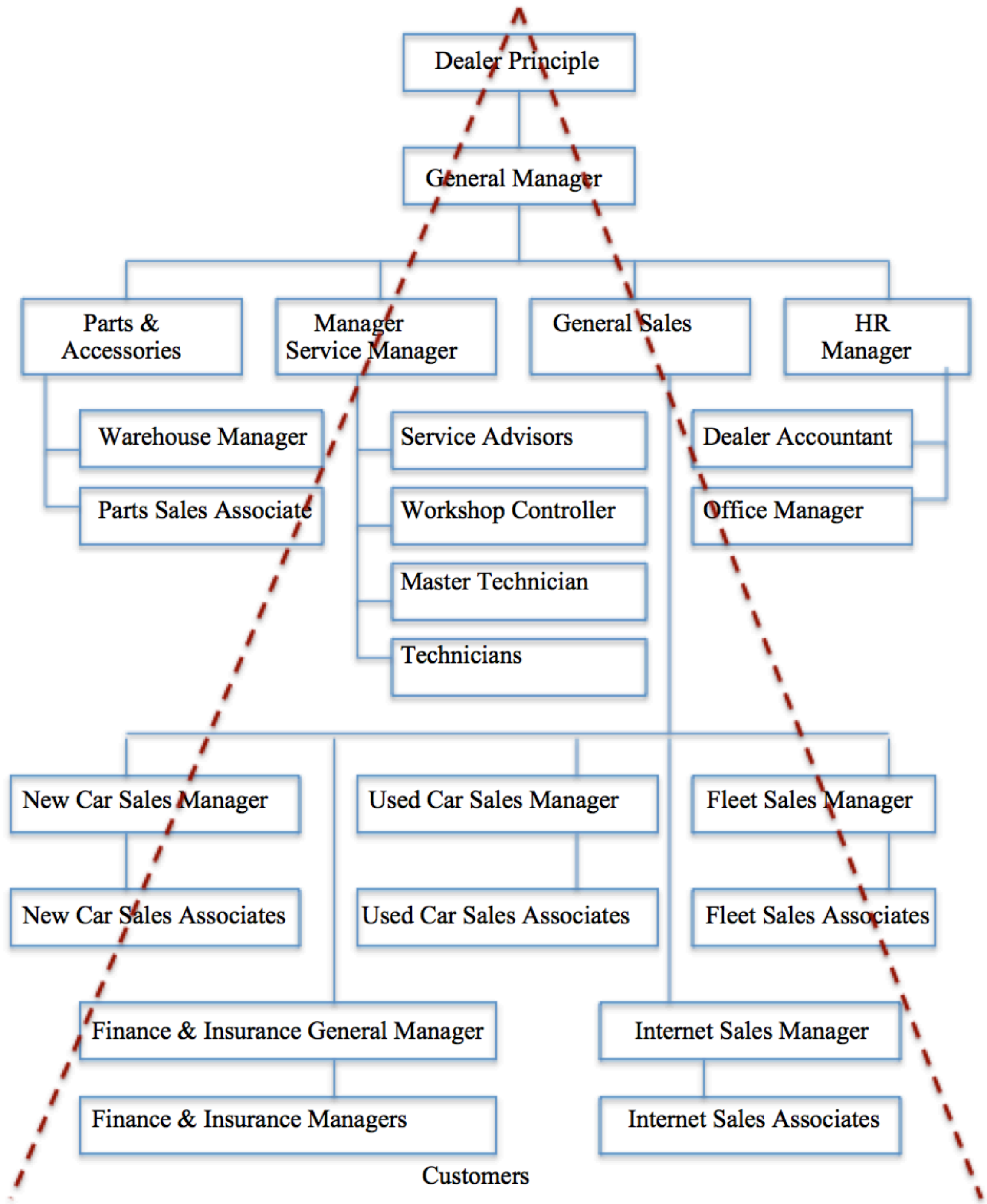

Figure 1. A hierarchical structure at a franchise dealership (Automotorpad, 2014).

responsible for different roles at the dealership. Yet, despite the debate of whether each department is needed (e.g., Barkholz, 2013), and which department is more significant (Polston, 2017), every department brings value to the productivity of the whole dealership.

Aside from the contextual differences of each department, there are many commonalties between them. The overall goal of an automotive organization and each department is productivity, which is achieved through consistent and improved sales volume, employee and customer retention (Beresford, 2014; Skrobot, 2000), excellent customer service (Barkholz, 2013; Nath, 2017), and commission-based compensation (Owan, Tsuru, & Uehara, 2015).

Employee and Customer Retention

Employee satisfaction and customer satisfaction are mutually influential on one another (Lutz, 2016). According to Reahard, “anybody who still thinks everybody is replaceable is a dinosaur. The real strength of every business is its people” (Lutz, 2016). According to Rick Case (2011), the owner of the Rick Case Automotive Group, satisfied customers and associate retention are key to thriving and lasting business. This is because “sales personnel play a key role in the formation of long-term relationships with business partners including buyers and suppliers” (Rajagopal, Pitt, & Price, 2010, p. 105). Buyers relationships with sales associates influence their “perceptions of the seller’s reliability, the value of their services and consequently the buyer’s interest in continuing the relationship” (Rajagopal et al., 2010, p. 105).

Annual turnover at dealerships is averaging 45% (Harris, 2011) and has reached up to 200% (Chrysler Academy, 2009), which is considered to be a high turnover rate

(Bureau of Labor Statistics, 2012). High turnover rates limit the dealerships' ability to provide high quality training to the associates, which negatively affects the service quality provided to the automotive consumers (Hausknecht, Trevor, & Howard, 2009). To customers, employee retention is an indicator of quality of an organization and its associates (Beresford, 2014). A study conducted by Barbara Beresford (2014) examined whether customer retention has an affect on the turnover rate at the automotive dealerships. Her study concluded that even though higher customer retention did not improve high turnover rates, it did improve the gross amount made per sale, which could help reduce the cost of high turnover rates in the automotive dealership environment.

The traditional hiring and retention culture at dealerships is to hire associates until one "sticks" (Beresford, 2014). In other words, let sales associates figure out the dealership structure on their own, until low performance associates naturally leave the job due to an inability to financially support themselves, and provide recognition to the high performance associates (Beresford, 2014). It is beneficial to the organizations to retain high performers in comparison to the low performers (Hom, T. Lee, Shaw, & Hausknecht, 2017). Therefore, it is of high importance for dealerships to retain high performers. The dealers are implementing creative ways to improve employee retention, such as employee transfers (Wilson, 2014). Additionally, the opportunity of promotion provides strong incentives for salespeople (Yang, 2018). Yet, retention is a continuous problem in the automotive industry, commonly because not every one is suited for the high emotional demand required in sales and commission based jobs (Case & Case, 2015).

Customer Service

Sales professionals and organizational leaders who show greater productivity take a relational, rather than a "hard sales," approach before, during, and after the sales process (Delpechitre & Baker, 2017; Filisko, 2014; Gountas, Gountas, & Mavondo, 2014; Hong, Tran, & Yang, 2018; Lutz, 2016; Rajagopal et al., 2010). Case (2011) states, "If you sell a car, you sell one, if you build relationship, you sell many" (p. 142). Positive customer service is a link between the consumer and the business. This connection can happen through the utilization of different platforms, such as online, phone, and face-to-face interactions. Yet, all forms of connection include some form of communication. When a consumer perceives those relationships as positive, then he or she perceives the business as positive. Similarly, when the consumer perceives their relationship with the customer service in the negative light, it negatively affects the consumer's relationships with the business. Customer satisfaction brings positive financial returns (Bagozzi et al., 2012; Case, 2011; Sanderson, 2016; Sanderson & Edwards, 2014). Reputation and positive word-of-mouth due to improved customer satisfaction increases customers' perceived quality of the sales process (Westlund, Gustafsson, Lang, & Mattsson, 2005). According to Case (2011), "62% of automotive customers have family members who will buy a car within 12 months" (p. 77). Therefore, it is crucial for business competiveness to establish and maintain high quality customer service.

Commission-Based Sales Environment

Commission-based jobs in the automotive environment are often considered to be less desirable and are often viewed as a short-term career (Beckman, 2010; LaReau, 2012). Long hours and poor financial rewards make a commission-based job challenging for low performance associates (Beresford, 2014). On a bright side, automotive sales associates do not need a college degree and many long-term sales associates are able to develop a repeat and referral customer base (Beresford, 2014). A commission-based pay structure at multiple departments of the dealership is a common way to stimulate sales associates, service and parts managers, and financial advisors performance (Owan et al., 2015). There is an ongoing debate whether a commission-based pay structure is the best option for the automotive environment (e.g., Dishneau, 1992; Hiday, 1996; Owan et al., 2015; Tsuru, 2008). It is believed that organizations with a commission pay structure demonstrates higher productivity and an enhanced quality of the workforce (Owan et al., 2015). A study by Lazear (2000) supports this by stating that introduction of the commission pay structure accounts for half of the productivity improvement. However, a study by Larkin (2014) suggests that sales associates manipulate prices to influence the timing of customer purchases, which costs organizations 5.7-8.7 percent in revenue due to discounting.

Unlimited financial growth opportunity and flexible hours motivate sales professionals to work for the commission structured sales environment (Phelps, 2017). According to Art Sobczak, President of Business By Phone (Smith, 2013), in order to succeed in a commission structured sales environment, a sales professional is required to be organized, passionate, have a burning desire to succeed, take consistent action, have some money in a bank to fall back on, as well as be willing to help others, work overtime, be self-motivated, hungry for knowledge, want to control their salary, self-disciplined, confident and positive, a great interviewer and performer, posses phenomenal communication skills, able to develop and execute a plan, and never satisfied. Not everyone is able to keep up with such requirements.

Commission-based jobs are high-demand and high-burnout positions (Lutz, 2016; Shulman, 2002). “If you don’t produce, you’re not going to survive,” said Lycia Jedlicki (Lutz, 2016). A sales associate who does not meet sales goals could not only feel disappointed in one’s own performance but he or she could also start a new month owing the company money from the previous month (George, 2013). Many sales professionals and their managers believe that putting long hours on the job is a key to productivity (Shulman, 2002). However, the long-hours of the sales environment could negatively affect sales associates’ health (Bakalar, 2016). Still, according to Sharf (2001), long hours are a mild concern. “It’s not so much the number of hours that these people work but the stress they experience on the job” (Sharf, 2001). Additionally, unless the family is supportive of the sales professional’s work environment (Lapierre & Allen, 2006), relationships with family members could also be negatively affected (Matthews, Swody, & Barnes-Farrell, 2012). Furthermore, not everyone is able to handle constant rejections from customers during the sales process (Case & Case, 2015).

Professional burnout has negative physical and psychological consequences on the sales associate, as well as on the organization as a whole (Garton, 2017). Employers realize the negative effects of employee burnout on organizations (Case, 2011; Shacklett, 2016). Organizations are trying to minimize burnout through actions like creating a fun work environment (Shacklett, 2016) and encouraging work-life balance (Shulman, 2002). The most productive sales associates and managers are able to balance their work and leisure time to maintain their physical and mental health (Shulman, 2002). Unfortunately, according to Merlyn Thompson at Xerox (Getlin, 1985), commission-based employees may feel reluctant to take time off, as it may seem financially unattractive.

Service Advisor

A service advisor (also known as service associate, automotive service writer, or service manager) is responsible for selling automotive service products, such as tire rotation, oil change, and electric and mechanical repairs. A service advisor must be physically strong, possess problem solving skills, manage the safety and quality of the product, be able to assess and present automotive concerns, be well versed in product knowledge, have excellent verbal and written skills, and provide exceptional customer service (Monster, 2017). High expectations and commitment to job performance pays off. A typical service advisor's salary exceeds the national average wage (Albright, 2013).

Service advisors do not have to work hard on selling services because people buy those services based on need (Harkins, 2009). Customers know they need an oil change and other required automotive services. For service customers, it is a matter of where to service, rather than should I service (Harkins, 2009). The main focus of the service advisor becomes establishing positive relationships with customers (Frederick, 2013; Harkins, 2009; Nath, 2017; Skrobot, 2000), so that customers would bring their car to the dealership for service repairs and buy a new car when they are ready. Some believe that the service department and its associates are more significant to customer retention than sales department because service has an ongoing contact with customers (Polston, 2017). In other words, a car sale professional brings the customers in, service professional make sure they will come back (Rick Case University service advisor training, 2017).

In order to make the service visit a pleasurable experience the service advisor must help their customers to manage anxiety during the service visit (Skrobot, 2000). Skrobot (2000) suggests to use empathic statements, building rapport, and follow service process. Others state that success will come to service departments that focus on convenience for their customers, like a location (Miller, 2018), pickup, delivery, and 24/7 services (Nath, 2017). Overall, the organizational goal for service departments is to maintain positive relationships with their customers.

Training in the Automotive Industry

The three strategies commonly utilized to improve customer service are mentoring and recruitment, training and development, and customer satisfaction (Ortman, 2018). High turnover rate, low skill job requirements, and a relatively quick process of finding and hiring new associates (Chrysler Academy, 2012) motivate many dealerships to save on investments by refraining from training new hires until they know that an associate is able to perform (Beresford, 2014). However, customers are keen to be loyal to the associate over the dealer (Beresford, 2014). Additionally, according to Joe Castle, who owns Castle Chevrolet and Castle Buick-GMC in Chicago, it is very difficult to find a sales person who would be willing to work for a small salary with a potential to earn higher commission (LaReau, 2012). Therefore, it could be favorable for the dealer to retain even low performers (Beresford, 2014), while improving their level of performance through training.

Mirabito's (2008) research suggests that consumers of different services and products choose between professionals based on two areas: product quality and interpersonal quality. Product quality refers to the automotive service associate's knowledge and competence. The interpersonal quality refers to the positive relationships between customers, automotive workforce, and the dealership that promotes satisfaction, loyalty, and trust.

Based on the educational requirements set by the National Automotive Dealer Association University Online (National Automotive Dealer Association [NADA], 2017), it is evident that automotive professionals are highly trained in providing high product quality. They are armed with content driven information such as legal and regulatory compliance, marketing, finance and insurance, and business strategies. Training provided by manufactures is focused on knowledge of the product, its features, and competiveness with other brands. This influences what educational materials are available and sought after in the automotive environment. Therefore, there is a vast amount of the content driven education available for automotive professionals (e.g., Grant Cardone University; JM&A Group; Rick Case University). These trainings include information like sales and service process, vehicle delivery steps, closing techniques, and management strategies.

Relationally Based Training in the Automotive Industry

Automotive professionals and dealers recognize the value in establishing ongoing positive relationships with their clients. The majority of trainings include strategies and techniques toward improving customers' satisfaction and providing excellent customer service. For instance, Rick Case Automotive Group focuses on establishing quality before chasing quantity, which is why they invest in high quality training for their employees (Case, 2011). According to Case (2011), "We're not in the car business—we are in the relationship-building business" (p. 76). Organizations and individuals who prosper in sales industries view positive relationships with customers as their primary focus (Delpechitre & Baker, 2017; Filisko, 2014; Hong, Tran, & Yang, 2018).

Inability to retain dissatisfied customers costs millions of dollars in revenue (Ortman, 2018). Stock and Hoyer (2005) encourage organizations to provide ongoing professional training for their employees at all stages of their professional development in order to prevent negative behaviors and improve effectiveness. In order to create lasting relationships with clients, sales professionals must be able to solve problems and establish effective interpersonal communication (Newell & Plank, 2012). According to Lawrence (2016), the ability to cultivate relationships is the essential skill for the sales professional's success. Continuous workforce development is crucial in constantly changing sales environments (Davis, 2014). It is imperative for sales structured organizations to develop training programs that would help their associates to enhance their relational skills (Newell & Plank, 2012; Ortman, 2018). Proper automotive professionals' training could enhance consumer satisfaction, loyalty, and trust, which would improve dealer competiveness in the market.

There is a diverse amount of relational based training available for sales professionals. For instance, Lederman (2011) teaches ways that could help sales professionals improve their likability in order to improve their relationships with customers, such as identify common interests with others, improve listening skills, be authentic, and be patient. Kendall (2017) believes that a productive sales career begins with personal mastery, such as developing a mind set for productivity and controlling emotional energy. He talks about developing value in the sales person. Kendall (2017) stresses that sales people should stop selling and start solving. He concludes with recommendations for the professional organization and ways of establishing ongoing communication with clients. Rapport Leadership International (2016) is a school of leadership development, which focuses on helping managers from various organizational structures, including dealerships, to improve their leadership qualities by enhancing self-awareness, decision-making, and motivation.

Some trainers and researchers encourage sales professionals to take customer orientation into their sales approach, in other words, keep their main focus on customers rather than on a product. “Customer orientation is an attitudinal attribute that has a positive impact on customer satisfaction and job performance” (Gountas et al., 2014, p. 118). Customer orientation limits customer’s switching behavior, enhances customer satisfaction, and improves intentions to recommend and repurchase (Gountas et al., 2014). Bagozzi et al. (2012) believe that a customer orientation approach is more likely to produce better results than hard sales-orientated attitudes. Additionally, job performance based on customer orientation leads to job satisfaction and general wellbeing (Gountas et al., 2014; Wright & Cropanzano, 2000). Kidwell, Hardesty, Murtha, and Sheng (2011) state that salespeople with high emotional intelligence are effective at employing a customer-oriented selling approach and able to influence customer decisions.

Many trainers focus on the importance of emotional intelligence because professionals with high emotional intelligence are professionally productive, get better results, and have loyal customers (Spencer, 2017a, 2017b; Tracey, 2013). “Sales professionals with higher EI are not only superior revenue generators but also better at retaining customers” (Kidwell et al., 2011, p. 78). Colleen Stanley (2012) created Ei Selling, a sales training program that focuses on enhancing emotional intelligence. She highlights the importance of empathetic statements and control of emotional impulse by sales professional in order to improve customer satisfaction and establish productive relationships. Spaulding and Plank (2007) also underline the significance of empathetic statements in the automotive sales process for organizational effectiveness. Similarly, cross-cultural selling has become an important factor in sales education (Delpechitre & Baker, 2017).

Marriage and Family Therapy

Marriage and family therapists help individuals, couples, and families to work through relational issues (Rambo & Hibel, 2013). They help individuals create desired change in their relationships with others and themselves. Different therapists view the process of creating that change differently (Rambo & Hibel, 2013). For instance, therapists who work from an MRI approach would be interested in helping clients to interrupt problem cycles in their life (Fisch, Ray, & Schlanger, 2009); solution-focused therapists focus on directing clients toward doing more of what worked in the past (Berg, 1994; Lipchik, 2002); and narrative therapists alter the dominant story clients tell to themselves (M. White, 2007; M. White & Epston, 1990). However, despite differences in therapeutic techniques and styles utilized by different therapists, there are many commonalities between them.

Common factors research lists key elements of effectiveness in therapy that are universal to all theories (Sprenkle & Blow, 2004a). Those common factors are mechanisms for change (Sprenkle & Blow, 2004a). In other words, the similarities among theories are more important than their differences (Gehard, 2014). Yet, common factors work through models (Sprenkle & Blow, 2004b). In this way, a therapeutic model is a tool that increases a therapist's effectiveness, rather than serving as the one and only true path (Gehard, 2014; Karam, Blow, Sprenkle, & Davis, 2015). Models help guide therapist trainings, maintain organization and structure, and instill confidence in the therapeutic process (Karam, Blow, et al., 2015).

Michael Lambert (1992) described four key elements of common factors to therapeutic change: client factors, hope and the placebo effect, the therapeutic model, and therapeutic relationships. Client factors include client motivation and resources. Lambert (1992) believed client factors account for 40% of change in a client's life. Hope and the placebo effect are about a client's level of hope and belief that therapy will help, which he estimates as 15% of change. The therapist's specific therapeutic model and techniques he estimated as 15% of change, whereas therapeutic relationships are responsible for 30% of change. Therapeutic relationships refer to the client's perception of the quality of the relationships between the therapist and the client. Although those numbers should be considered as an estimate, rather than a fact (Gehard, 2014), they express the significance of relationships over the specific therapeutic model and techniques.

Wampold (2001) conducted a similar meta-analysis. He identified three variables of common factors: therapeutic model, general factors, and unknown factors. According to Wampold's common factors model, the therapeutic model accounts for only 8% of change; unknown factors, meaning variances that are not related to known variables, account for 22% of change; and general factors such as therapeutic alliance, expectancy, and hope are responsible for 70% of change. Wampold's (2001) study confirms Lambert's (1992) emphasis on the importance of human relationships. Therapy models and techniques are still significantly important. Shadish and Baldwin's (2002) meta-analysis study states that marriage and family therapy interventions are more effective than no therapy at all. Yet, based on Lambert (1992) and Wampold's (2001) research, therapeutic interventions are not as significant in creating change as a human connection. Blow, Sprenkle, and Davis (2007) stated that the therapist is a key change ingredient in most successful therapy. Karam, Sprenkle, and Davis (2015) echoed their statement by highlighting the importance of therapeutic alliance in marriage and family therapy work.

Evidence based research tries to undervalue and underestimate the importance of therapeutic relationships by highlighting the importance of therapeutic models in a client's process toward change (Gehard, 2014). Perhaps this is because it is difficult to measure and control non-scientific factors like relationships (Gehard, 2014). Bowen theory was able to connect scientific aspects of human interactions with non-scientific aspects (Bourne, 2011a; Bourne, 2011c; M. Kerr & Bowen, 1988), and through that, focus on the relational aspects of communication. A therapist who practices from a Bowen perspective focuses on self-reflection and how the self of the therapist affects the clients in front of him or her (Brooks & Roberto-Forman, 2014; Schur, 2002).

Bowen Family Systems Theory

Bowen Family Systems Theory was developed by Murray Bowen, M.D., in the early 1950s (M. Kerr, 2003; M. Kerr & Bowen, 1988). Bowen conceptualized the problem in relationships between people, rather than dominant thought introduced by Freudian theory at that time, which conceptualized the problem inside the person (Bourne, 2011a; M. Kerr & Bowen, 1988). His thinking was also innovative in his view of an individual as a part and parcel of his or her family (Bourne, 2011a; M. Kerr, 2003; M. Kerr & Bowen, 1988). The theory provides a frame of reference about natural human patterns of emotional response to the system around them (Bowen, 1978; M. Kerr, 2003; M. Kerr & Bowen, 1988).

Bowen introduced four theoretical assumptions and eight concepts that help explain the patterns of human relationships. Those four theoretical assumptions are: (1) chronic anxiety, (2) individuality and togetherness, (3) the emotional system, and (4) the family as an emotional unit (Comella, 2011; M. Kerr & Bowen, 1988). Eight Bowen theory concepts are: (1) differentiation of self, (2) the nuclear family emotional system, (3) family projection process, (4) multigenerational transmission process, (5) triangles and interlocking triangles, (6) sibling position, (7) emotional cutoff, and (8) emotional process in society (Bourne, 2011c; Comella, 2011; M. Kerr, 2003; M. Kerr & Bowen, 1988).

A Bowen informed therapist works from the presupposition that an individual's behavior and emotional functioning make sense in their relational context, and that an individual's basic emotional functioning is established in that person's family of origin (Comella, 2011). Bowen therapy assumes that a nuclear family is shaped by multigenerational emotional processes before the family and will be transferred onto the families in the future generations (M. Kerr & Bowen, 1988). An emotional process in the nuclear family shapes human functioning in other interactions, such as workplace and larger community (Comella, 2011). Hence, a therapist must account for an individual's external factors that the individual perceives as a threat (Comella, 2011).

The point of reference in the Bowen theory is the self of the participant (Brooks & Roberto-Forman, 2014; Schur, 2002). It is assumed that an individual is being affected by the system he or she is in, in the same way as he or she affects the system. Therefore, in order to generate a desired emotional response in the system, the individual must begin with generating a desired emotional response in one's self. Bowen theory helps improve an individual's capacity to accurately observe his or her own emotional functioning (Comella, 2011) and then respond in a desired way. For instance, in the example of this research project, my own emotional functioning as a researcher would have an affect on the emotional functioning of my dissertation committee and research participants. A Bowen systems theory reference would help me to observe my own emotional functioning during this research project.

Chronic Anxiety

Anxiety is an emotional response to threat, which is common to all life forms and automatic (Bourne, 2011c; M. Kerr & Bowen, 1988). M. Kerr and Bowen (1988) do not refer to the anxiety in terms of diagnosis but rather as a high emotional energy level. They describe two types of anxiety. Acute anxiety refers to the response to a real threat, which is imminent and highly likely to materialize. Chronic anxiety refers to the response to an imaginary threat, which is not imminent and uncertain of whether it will realize, yet is no less intense.

Anxiety is a constantly changing energy that has influence on the emotional system (M. Kerr & Bowen, 1988). The emotional system is physical and includes instinctual lower level responses (the emotional field) of an individual or group (e.g., family, organization, business entity) that is distinct from feeling (personalized response to the emotion based on experience, beliefs, and memories) and intellectual (thoughtful response to the feeling) responses (M. Kerr, 2011; M. Kerr & Bowen, 1988). Different people and emotional systems have different comfort levels of anxiety. Anxiety is not quantified as positive or negative, but rather is viewed as an energy level that is always present and could increase or decrease with duration and intensity (M. Kerr & Bowen, 1988). In the natural systems theory, this energy is being understood as necessary for the survival of the emotional unit (M. Kerr & Bowen, 1988).

According to Comella (2011), “People’s flexibility to adapt is directly related to their level of chronic anxiety and the relationship system to which they belong” (p. 9). Chronic anxiety is an energy that must be managed, generated, and directed toward a particular purpose. Managing anxiety means being able to be emotionally, physically, and intellectually present, as well as maintain a higher level of differentiation of self in order to negotiate relationships in a way that is relationally healthy for all parties involved (M. Kerr & Bowen, 1988). Ability to manage chronic anxiety allows people to relationally feel secure and communicate most clearly (McGoldrick, 2011). While in the presence of anxiety in the system, people typically distort their messages to protect themselves and others (McGoldrick, 2011).

People utilize multiple techniques and engage in a variety of relationships to help themselves remain comfortable at their level of anxiety. Individuals will try to make changes to themselves, including self-harm, and to the members of their emotional unit, including being cut off, to maintain an anxiety level in the parameters comfortable for them (M. Kerr & Bowen, 1988). Some people require a higher level of anxiety than others to feel comfortable. Others function better in a lower anxiety level. Should the anxiety level increase beyond individual or system thresholds, they will try to engage a third party into a “triangle” and interlocking triangles to help them stabilize chronic anxiety level (Comella, 2011).

Relational Triangles and Interlocking Triangles

Triangles arise every time two parties involve a third party rather than dealing with the anxiety between them directly (McGoldrick, 2011; McGoldrick, Gerson, & Petry, 2008). It is common for people to distribute anxiety by forming relational triangles (McGoldrick, Gerson, & Petry, 2008). Relational triangles are the smallest stable units in a system of relationships (Bowen, 1978; M. Kerr & Bowen, 1988). People find themselves in diverse triangles, some of which are comprised of relationships with other people, while others with relationships with things, both physical, such as alcohol, and mental, such as beliefs. The emotional triangles are not limited to small systems. A small relational system could be viewed as an emotional unit in a larger emotional triangle. For instance, countries, religious beliefs, and racial identity could be viewed as an emotional unit of the relational triangle.

People are not isolated to one triangle (McGoldrick, Gerson, & Petry, 2008). The systems of human interactions are comprised of multiple relational triangles. Each individual is affected and affecting by direct and indirect emotional triangles. Those triangles are connected and have influence on each other. M. Kerr and Bowen (1988) name these interlocking triangles. With duration, these triangles and interlocking triangles stabilize and define the new relationship system, which contains that anxiety (Comella, 2011; McGoldrick, 2011).

Relational triangles and interlocking relational triangles should not be understood as all bad or good (Gilbert, 2006). They are simply a way the energy is being transferred. In the same way, each emotional unit of the triangle is neither bad nor good. The energy may be viewed as negative or positive. Yet, what is important is not the value people assign to that energy but rather the quantity, duration, and intensity of that energy. The energy is not distributed equally between members of the triangle (Gilbert, 2006). The energy between two units of the triangle could be stronger in comparison to the energy of the third unit and then the energy could be shifted and become the smallest between a pair in comparison to the energy between the third unit and one of the previous units (Gilbert, 2006). There is always a unit of the triangle that receives less energy than the other two. Yet, this position is not constant.

The energy is not being placed in a triangle. It is being generated within a triangle. Yet, triangles may receive energy from connection to other triangles, and at the same time, distribute energy into another triangles. Due to the constant transference of energy within and outside the triangle, this energy is never stable. Each unit has a range of energy that serves survival needs of that unit and larger system. The need for survival of each unit motivates a unit to generate, receive, or distribute the energy. The triangle is a way to manage relational energy.

Individuals never stop being part of multiple triangles. When one triangle disappears, another forms. Escaping the triangle is not the goal for an individual. Rather, the goal is to manage relational triangles effectively to improve functioning for the system and self. In Bowen's conceptual framework, this means achieving healthy differentiation of self (Bowen & M. Kerr, 1988). In other worlds, being able to function "independently in each relationships and not automatically falling into a patter of relating to one person based on that person's relationships with a third person" (McGoldrick, Gerson, & Petry, 2008, p. 170).

Differentiation of Self

Differentiation of self is understood as an ability to separate feelings, emotions, and thoughts, as well as separate their own feelings, emotions, and thoughts from those of surrounding people and systems (M. Kerr & Bowen, 1988; Papero, 2014; Spencer, 2017a). Differentiation of self is a process of defining the self in the system, while maintaining emotional connection to the system (Spencer, 2017a). This means being able to have different opinions and values, yet being open to different perspectives. It also means being able to calmly reflect on a conflict and realize one's own role in it, and then choose a response.

People invest great amounts of energy on creation and maintenance of the relationships (Spencer, 2017a). Differentiation of self describes an individual's ability to manage that energy by making emotional and intellectual decisions for the self, independent from others. Differentiation of self could be understood as a spectrum of self-management. The effort to improve functional differentiation does not have a final destination (Papero, 2011; Spencer, 2017a). It continues a personal growth process (Spencer, 2017a).

An individual with a low level of differentiation is fused in the emotional system and struggles to separate their own thoughts and emotions from the thoughts and emotions of the system (M. Kerr & Bowen, 1988; Papero, 2014). On the other hand, individuals with a higher level of differentiation of self are able to maintain self-reflection on their own emotions and thoughts within the emotional system (M. Kerr & Bowen, 1988; Papero, 2014). They are less reactive and more thoughtful when chronic anxiety increases. An individual operating at the highest level of differentiation of self is able to not get sucked into disturbances in emotional gravity through managing, negotiating, and redirecting energy in a way that causes the least disturbance to both that individual and the system. This individual has emotional connections and reactions. He or she gets angry, falls in love, and has emotional desires, but the way this individual goes about managing emotions is very thoughtful. He or she remains thoughtful throughout the process, and when emotions are being expressed, they have a thoughtful purpose.

Marriage and Family Therapy in Business

Marriage and family therapy relational skills are shown to be beneficial in multiple settings (Hibel et al., 2017; Rambo, Boyd, & Marquez, 2016). Marriage and family therapists (MFTs) offer unique perspectives beneficial to corporate and organizational settings (Marquez, 2016b), as well as sales environment (Hibel et. al., 2017; Marquez, 2016a; Tikhonravova, 2016, 2018a, 2018b, 2018c, 2018d, 2018e, 2018f, 2018g; Tikhonravova & Khan, 2015). MFTs have established a positive reputation in their work with family members who also own and run businesses together (Cole & Johnson, 2012), for instance, helping family businesses through the process of succession (Solomon et al., 2011).

Business consultants with and without MFT training are able to provide unique perspectives and expertise for family owned businesses (J. Lee & Danes, 2012). Yet, MFTs are different from business consultants in having greater diversity, depth of conceptual knowledge, awareness of the importance of context, and viewing family firms as interconnected and complex systems (J. Lee & Danes, 2012). According to Dupree (2007), MFTs have a unique advantage by viewing systems to allow change, collaboration, and progress. Yet, there are additional training opportunities available for MFTs who wish to work with family owned businesses (Distelberg & Castanos, 2012).

Bowen Family Systems Theory in Business

Bowen Family Systems Theory has shown successful application of its concepts in multiple business contexts, such as outpatient substance programs (C. White, 2011), relationship coaching (Papero, 2014), mediation (Wayne, 2011), family business (Chaponniere & Ward, 2003; Norton, 2011), mental health supervision (Bregman, 2011; Brooks & Roberto-Forman, 2014; MacKay & Brown, 2014; Schur, 2002; Schur, 2011), sales (Marquez, 2016a; Tikhonravova, 2016, 2018a, 2018b, 2018c, 2018d, 2018e, 2018f, 2018g; Tikhonravova & Khan, 2015), government agencies management (Fox, 2008), healthcare systems (Fox & Sheridan, 2007; R. Kerr, 2011), higher education (Hargrove, 2011; R. Kerr, 2011; Lester, 2011), leadership training (Engels, 2011), leadership consulting (Romig, 2011), and organizational consulting (Bregman & C. White, 2011b; Rosenberg, 2013). It is almost impossible to highlight one Bowenian theoretical assumption or concept as separate or superior from another because Bowenian assumptions and concepts compliment each other rather than stand as independent entities. At the same time, research suggests that the most helpful concepts to family business from Bowen theory are differentiation of self (Bourne, 2011c; Engels, 2011; Norton, 2011), triangles (Bourne, 2011c; Fox, 2008), chronic anxiety (Fox & Sheridan, 2007; Romig, 2011; Tikhonravova & Khan, 2015), and reciprocal over-functioning and under-functioning in leadership (Fox, 1999; Romig, 2011).

Daniel Papero, in his discussion with Kathy Wiseman (Bregman & C. White, 2011b) about the application of Bowen theory at the workplace, highlighted that people in organizational development, like people in mental health fields, are looking for techniques.

> From my point of view, technique is not the first thing to think about. The first thing you do think about is systems—systems theory and systems thinking—not about what do I do right now with this problem. As a consultant, my process is to "think alongside people" about the challenges in their world. (p. 210)

Papero shares that it is very difficult to maintain one's own level of differentiation and resist the pressure of offering techniques because there is a lot of money involved in corporate consulting, including family businesses (Bregman & C. White, 2011b). "There's a real tendency to do what the system wants as opposed to representing what one really thinks about the nature of the problem (Bregman & C. White, 2011b, p. 211).

In many cases, corporate consulting is designed to do what the system in place already wants to be done (Bregman & C. White, 2011b; Heifetz, 2009). People are unaware of the emotional processes because they are too focused on the contextual issues (Bregman & C. White, 2011b). Papero expressed that his role, as a corporate consultant, is to help people move toward differentiation of self (Bregman & C. White, 2011b), which focuses on analyzing the process of relational interactions, rather than mastering techniques in order to "fix" the context to one's own desire. Engels (2011) provides a Bowen-based, advanced level leadership course tailored to business owners, chief executives, presidents, managing partners, and other key leaders in business and industry. Like Papero, Engels (2011) shares that Bowen based business consulting is not about pleasing clients by giving them answers and solving their problems, but rather in promoting maturity and responsibility for self.

Stress and anxiety has an impact on the emotional system of an organization and its associates; thus, reduction of anxiety and fear in people increases the quality of thinking (Bregman & C. White, 2011b). During challenging times, people are more sensitive and reactive, which leads to emotional reactivity. This thinking aligns with Romig (2011), a Bowen informed leadership consultant and coach with global corporations, who states that stress on the job destroys creativity and innovation, and creates tunnel vision, which destroys an ability to see a solution to the problem. Similarly, Fox and Sheridan (2007), in their work with organizations during corporate transitions, state that organizations that are already anxious will face even more challenges during corporate changes. Everyone experiences corporate transitions differently, however, so an anxious response can be transmitted and affect everyone involved (Fox & Sheridan, 2007).

Over-functioning, top-down leadership produces low performance (Romig, 2011). A Bowen informed leader realizes his or her own role in influencing employee functioning. For a Bowen informed leader, organizational progress lays in the relationships between the leader and employees, rather than in the leader doing things to employees (Romig, 2011). Leadership personality and leadership style makes a difference in organizational performance results (Hogan & Kaiser, 2004; Romig, 2011). An anxious leader keeps close monitoring of his or her employees and makes the decisions for an organization, which takes away the responsibility from employees' actions and stops creative development for the organization (Romig, 2011), whereas a calm and present leader empowers his or her team through participative goal setting, decision-making, and problem solving (Case, 2011; Romig, 2011). A leader's relationships with employees influences their behavior and thinking (Romig, 2011).

According to Heifetz, Grashow, and Linsky (2009), the ability to reflect on the situation is the single most important and undervalued skill in relationship management. Heifetz et al. (2009) proposed a three-step process to achieve a functional level of differentiation of self in organization. It begins with being able to calmly reflect on conflicted interactions, then next to realize your own role in the conflict, and then choose a response that interrupts the problem cycle. Heifetz et al. (2009) did not use differentiation of self terminology in their writings, yet they talked about the ability of getting an emotional distance between the self and the situation—"get on the balcony"—and the ability to maintain authenticity from the system while being emotionally connected with the system, which is the definition of differentiation of self.

Employees and consultants with a higher level of differentiation of self demonstrate higher emotional functioning (M. Kerr & Bowen, 1988). This permits the free exchange of thoughts and feelings on both sides (M. Kerr, 2011). They are less reactive and more thoughtful during moments of emotional instability in the organization. Consequently, individuals with higher emotional functioning experience lower emotional exhaustion and higher job satisfaction (Maini & Chugh, 2012). This could be because an individual with higher emotional functioning is better able to maintain calm presence during stressful situations (Papero, 2014), which is the key to productive, thoughtful, and inspirational leaderships. This is why, when it comes to Bowen informed supervision, a supervisor prioritizes one's own ability to differentiate so that he or she is able to maintain a calm and thoughtful presence with supervisees (Schur 2002, Schur, 2011, Brooks & Roberto-Forman, 2014). He or she then focuses on how the supervisee is able to manage his or her own emotional reactivity in the supervision and with their clients, rather than polish specific therapeutic techniques (Bregman, 2011; MacKay & Brown, 2014).

Leslie Ann Fox (2008) is a consultant for not-for-profit organizations and government agencies, who utilizes the concept of relational triangles to help organizations manage office politics. According to Fox (2008), office politics can impact the quality of products and services produced, jeopardize the safety and wellbeing of the associates, affect profitability and longevity of the business, and push people toward resigning from even the most favorable jobs (Fox, 2008). The ability to manage relational triangles effectively allows individuals to create a productive and satisfying work environment (Fox, 2008).

Corporate consultants find themselves easily triangulated and being pulled to both sides of the triangle. When an expert chooses a side in the triangle, it intensifies the rigidity in the system (Bregman & C. White, 2011b). Papero articulates that the presence of the third person who is not taking sides allows parties to hear each other's concerns more clearly (Bregman & C. White, 2011b). Staying neutral and not taking sides also allows consultants to maintain flexibility in the organizational system (Bregman & C. White, 2011b). The challenge that Papero expresses is that it can get very difficult to maintain neutrality (Bregman & C. White, 2011b).

When it comes to working with family owned businesses, it is imperative to see family members as a unit, rather than as individuals (Hollender, 1983; Norton, 2011). Keeping a relational perspective in the family business allows a Bowen informed consultant able to identify relational patterns and explain human behaviors, which can help improve relationships in the family. The better the relationships are in the families, the better it is for the business (Norton, 2011).

Bowen Family Systems Theory in Sales and Service

Bowen concepts are applicable for individuals from different countries and different professional backgrounds (Baker & Titelman, 2011; M. Kerr, 2011; Kolski-Andreaco, 2011). There are variations of themes described in Bowen theory and different relational contexts, but underneath, they are emotionally similar (Baker and Titelman, 2011; Howard, 2011; Nel, 2011). My personal passion is to introduce Bowen concepts into the world of automotive sales (e.g. Marquez, 2016a; Tikhonravova, 2016, 2018a, 2018b, 2018c, 2018d, 2018e, 2018f, 2018g; Tikhonravova & Khan, 2015).

Maini and Chugh (2012) view sales and service businesses as a form of emotional labor. In other words, the primary focus of a sales and service structured organization is to meet emotional needs of their clients in order to optimize customer satisfaction. “Good interpersonal relationships with co-workers further complement positivity between emotional labor and job satisfaction” (Maini & Chugh, 2012, p. 44). From a Bowen perspective, in order to provide superior customer service and achieve job satisfaction, the sales or service provider must first be able to regulate his or her own emotions in order to meet emotional needs of their clients and coworkers (Bregman & C. White, 2011b; Romig, 2011).

Effective sales and service professionals, like effective leaders, have good control of their own emotional reactivity (Norton, 2011; Papero, 2011). Sales and service professionals with higher emotional functioning are masters of retaining customers and generating superior revenue (Kidwell et al., 2011). Sales and service professionals who pose higher emotional functioning are more confident. This affects their way of interacting with customers, which may increase customers' motivational effects (Kidwell et al., 2011, p. 90). Ability to manage one's own emotional anxiety allows individuals to be more thoughtful and reflective during emotionally intense situations, rather than reactive with the need to change others (Papero, 2014). These individuals present themselves with calmness and attentiveness, which draws other people to them. Bowen theory provides service and sales professionals with tools to reflect on their valuable life experience, think for themselves, grasp new understanding, and produce desired change (Lester, 2011).

Many relationally focused sales and service training programs are focusing on professionals' personal characteristics, such as personality traits (Lounsbury et al., 2012; Loveland, Lounsbury, Park, & Jackson, 2015; Webber, Payne, & Taylor, 2012), communication style (Hall, Verghis, Stockton, & Goh, 2014), positive attitude (Du, Fan, & Feng, 2011; Wang et al., 2017), or conflict management skills (Beitler, Machowski, Johnson, & Zapf, 2016). Those trainings and studies provide a perception that the solution to productive and positive relationship building is located inside the sales person. However, the ability to establish positive relationships is rather located in the ability to manage relationships and recognize relational patterns. It is not about an individual's personality traits, it is about an individual's ability to adapt to the sales and service environment through relationship management.

Sales and service providers that prioritize relationships with customers over negotiations on price are more likely to obtain stronger financial results (Bagozzi et al., 2012; Sanderson, 2016; Sanderson & Edwards, 2014). Customer-oriented selling is both crucial and complex for sales and service industries (Harris, Mowen, & Brown, 2005). For instance, in the real estate business, retaining a tenant requires more relationship efforts than offering a good price (Appel-Meulenbroek, 2008). Bowen thinkers focus on the emotional process in the system, while maintaining respect for an individual's social values, practices, methods, and ideas (Bregman & C. White, 2011a). Individuals "avoid evidence or relationships that threaten their beliefs or condemn their actions" (Lester, 2011, p. 265). A Bowen informed sales and service professional focuses on maintaining thoughtfulness and calm presence with their customers, rather than trying to convince them that their thinking is wrong.

Bowen Family Systems Theory describes the concept of differentiation of self, which allows individuals to create stronger relationships based on cooperation, self-advocacy, and completion of mutual goals (M. Kerr, 2003; M. Kerr & Bowen, 1988). Individuals with a higher level of differentiation are viewed as relationally savvy and are able to successfully manage relational intensity through thoughtfulness and being less reactive (M. Kerr, 2003; M. Kerr & Bowen, 1988). They are able to be emotionally and physically present while maintaining authenticity to their own emotions and intelligence (M. Kerr, 2003; M. Kerr & Bowen, 1988). Working in a sales environment requires the ability to establish positive relationships with diverse populations (Goldblum & Alant, 2009; Ingram, 2004; Su, 2011); hence, enhancing the level of differentiation of self could beneficially affect a sales professional's performance. Bowen systems theory allows professionals to recognize, process, and manage relational intensity.

A sales environment is a relational environment (Case, 2011). In a fast-paced automotive sales environment, the ability to establish and maintain positive relationships with the client will determine professional success for the sales professional (Case, 2011). In the United States, purchasing and servicing a car commonly consumes a large portion of an individual's lifetime earnings (Thakor, 2010). The responsibility of such a purchase leads to creating a high level of intensity on the part of a buyer. Commission structured incentives in the automotive industry lead to a high level of intensity on the part of the seller (Lutz, 2016; Shulman, 2002). Additionally, the process of creating relationships between the seller and the buyer can be anxiety provoking and lead to an increase of relational intensity. Errors, miscommunications, and negative presuppositions are factors that could escalate a negative circular pattern in relationships between the seller and the buyer, which could lead to poor relationships, lost business opportunities, and even lawsuits. Bowen Family Systems Theory describes relational concepts that can promote productive management of relational intensity (Spencer, 2017a). This could enhance the quality of the relationships between the members of the sales environment and the systems with which they interact and within the system in itself.

Bowen Based Training and Learning

Bowen theory cannot be easily taught (Bregman, 2011) and therefore is not easy to grasp. This is because rather than taking somebody else's processed ideas and applying them into a personal setting, Bowen pushes learners to think for themselves, to challenge themselves, to come up with questions and answers for themselves (Bourne, 2011b), which is not easy. During a training on May 2, 1983 in Minneapolis, Murray Bowen shared, "My whole goal would be to help you get your thinking straight, and get thinking straight would apply to all various disciplines" (Bourne, 2011b, p. 249). Bowen wanted to encourage people to think for themselves, to generate ideas for themselves no matter what contextual setting they are in, rather than blindly follow someone else's opinion.

In his presentations, Bowen gave lectures, asked questions, showed videos, and drew family diagrams (Bourne, 2011b). "Studying the concepts of Bowen theory, constructing family diagrams, and exploring emotional process moves students toward new ways of thinking about relationships and emotional systems" (Lester, 2011, p. 266). However, Bowen encouraged his students to utilize those methods as expression, rather than theoretical ideologies (Bourne, 2011b). Bowen encouraged his students to look for different ways of communication, application, and expression based on personal thinking and preference. His goal was to help his students to improve independent thinking, not to copy the techniques (Bourne, 2011b). This is why Bowen placed an accent on improving level of differentiation.

According to Harrison (2011), "How a person participates in an educational process is an outcome of his or her level of differentiation of self" (p. 75). Teachers and students with a higher level of differentiation are more able to think for themselves and thoughtfully reflect on ideas from others (Harrison, 2011). Individuals with a lower level of differentiation of self invest more energy into relationships and are more sensitive to the anxiety arising from those relationships (Harrison, 2011). Learners with a lower level of differentiation of self depend on others for ideas and hear through what others think (Harrison, 2011).

A teacher with a lower level of differentiation of self quickly becomes emotionally reactive (Harrison, 2011). This leads the teacher to be critical of others and being overly invested in delivering "right" learning outcomes (Bregman, 2011). When that happens, he or she begins to provide tools and techniques to accomplish the task, which takes away from learners an opportunity to discover for themselves (Bregman, 2011). Additionally, a teacher who is overly invested in delivering "right" learning outcomes can generate reactivity in others, which may spark reactivity in the teacher, leading to loss of focus of the self (Bregman, 2011). Fortunately, differentiation of self could be enhanced through incorporation of a Bowen Family Systems Theory training (Spencer, 2017a, 2017b).

Bowen theory improves human relationships through providing clarity about emotional processes and ways of managing personal reactivity (Hargrove, 2011), which enhances individuals' functioning. Bowen training helps trainees to develop critical thinking (Hargrove, 2011) and enhances the differentiation of self and emotional intelligence (Spencer, 2017a, 2017b). "[Bowen based] training could essentially lead to the development of self, greater team functioning, greater efficiency, higher productivity for employees, leaders, and all the stakeholders" (Spencer, 2017a, p. 146).

Bowen Based Training and Learning in Business

In general, trainings are shown to be beneficial to the organizations by improving organizational performances in areas such as profitability, productivity, cost reduction, quality and quantity enhancement, improvement of organizational reputation, and decrease in turnover (Aguinis & Kraiger, 2009). Training is critical to the success of automotive organizations (Case, 2011). Two fundamental principles central to the application of Bowen theory in professional settings are (1) the person's acceptance of responsibility for self and (2) acceptance that a professional setting can change in response to a change in self (Papero, 2011). Bowen based business consulting is about promoting maturity and responsibility for self as a trainer and for the trainees (Engels, 2011). When it comes to the trainees, their ability to represent self complicates in a midst of trying to conform to the expectations of others, such as multiple managers, trainers, and supervisors (Papero, 2011). Therefore, it becomes imperative to help trainees calmly process their own thoughts separately from the desires of the relational system in their professional context.

In order to accomplish that, a corporate trainer must be able to manage his or her own level of differentiation. A corporate trainer with a lower level of differentiation could be emotionally reactive and take sides in a professional dilemma by which he or she would actively influence the maintenance of the problem in the organization (Papero, 2011). Additionally, the anxious trainer can transfer anxiety to the trainees, disrupting a basic plan for action or reinforcing uncertainty (Papero, 2011). A corporate trainer with a higher level of differentiation of self is able to manage their own emotional reactivity to help professionals focus their energy on professional settings, rather than trying to conform to the trainer's expectations (Papero, 2011).

Telling individuals how to think and what to do invites undifferentiation or fusion, as it encourages one to mirror reflections and curiosity from others (MacKay & Brown, 2014, p. 330). From a Bowen perspective, the relationship between the trainer and trainees, like the relationship between the supervisor and the supervisee, is about managing the self for both (Brooks & Roberto-Forman, 2014; Schur, 2002). Maintaining focus on the self allows the trainer to maintain a healthy level of differentiation of self and fosters equal collaboration.

Emotional intelligence of the organization is constructed out of the emotional intelligence of the individuals in that group (Gantt & Agazarian, 2004). The level of an individual's emotional intelligence determines their level of differentiation of self (Spencer, 2017b). A study conducted by Gignac, Harmer, Jennings, and Palmer (2012) demonstrated that the group who received training focused on emotional intelligence was able to outperform a control group by 9 per cent. Bowen based training leads to the development of self, critical thinking, reasonable decision making, proficient performance, working collaboratively, a goal oriented team productive environment, greater efficiency, and higher productivity for employees, leaders, and all the stakeholders (Spencer, 2017a). According to (Spencer, 2017a),

> This approach stands to save the organization time, money and resources that could have been used in addressing high turnover rates, high absenteeism, frequent sick leaves, low performance, low morale, motivating employees, frequent conflict management, problem resolution efforts, and even possible law suits. (p. 146)

This could be the reason why organizations choose Bowen informed trainers and consultants (Bregman & C. White, 2011b; Engels, 2011; Romig, 2011; Rosenberg, 2013).

Bowen Based Online Training and Learning

During the recent decade, the training tools expanded from a structured face-to-face platform to online, on demand learning (Bell, Tannenbaum, Ford, Noe, & Kraiger, 2017). Despite higher personal responsibilities and non-completion rates (Dunn & Rakes, 2015; Sun, 2014), an online training becomes one of the preferred ways of training methods for organizations (Jordan, 2016). Online (e-learning) and mobile (m-learning) training programs offer flexibility, convenience, and accessibility (Horton, 2001; Kolski-Andreaco, 2011). Research conducted by Jordan (2016) demonstrates no statistically significant differences between classroom or online trainings on training transfer. However, online structure makes it difficult to grasp Bowen theory concepts, especially for individuals who are new to Bowen Family Systems Theory ideas. According to Kolski-Andreaco (2011), an online training course in Bowen is best for the individuals who are already familiar with the Bowen concepts and want to focus on enhancing their skills. Despite the participants in a Bowen focused online training course answering positively to the online course structure, only a quarter of the participants were able to move beyond the introduction (Kolski-Andreaco, 2011). According to Kolski-Andreaco (2011), in order to create a successful Bowen based online training program, the program must include experiential opportunities for each module, have frequent contact with coaches, and avoid psychological jargon. Therefore, it is preferred to offer an introductory Bowen based training in a live format rather than online settings.

The Calm-Driven Service (CDS) Training Program

The CDS training program provided a training package, which consisted of six group-training sessions that helped participants to learn the relational concepts, and follow ups with two individual-coaching sessions that helped apply relational concepts on the job. According to D. Kirkpatrick and J. Kirkpatrick (2006), training participants need sufficient time and opportunity to apply new knowledge on the job to begin changing their behavior. The group-training sessions were spread approximately a week apart. The follow up coaching sessions were spread a month apart. The separation in time was scheduled to give participants sufficient time and opportunity to apply new knowledge on the job. The CDS training improved organizational competiveness by helping automotive sales and service professionals to create and maintain positive relationships with their customers and coworkers. The CDS program focused on the relational aspect of sales and service departments through providing basic understanding of the three Bowen Family Systems Theory concepts: differentiation of self, chronic anxiety, and relational triangles.

CDS Training Program Structure

The training began with six group-training sessions. (1) “Survival of the Fittest/ Natural Selection” outlined three fundamental relational human needs that affect individuals’ functioning in multiple settings. (2) “It Is All about Me” introduced automotive professionals to systemic ideas with a focus on the role of the self toward creation of desired change. (3) “The Law of Anxiety: Professional” described actions people take in moments of high intensity and their effects on the emotional system, as well as four steps that the professional could utilize to manage their own anxiety. (4) “The Law of Anxiety: Customer” highlighted three common patterns for increasing chronic anxiety in customers and what participants could do to manage this. (5) “Relational Triangles” defined two ways to identify and manage relational situations in which individuals are pulled into someone else’s problems. (6) “We Sell the Way We Are” introduced service advisors to the concept of differentiation of self and three steps they can take toward emotional self-care before helping others.

The second part of the training program focused on providing individual support to the training participants in the form of coaching. This was done in order to help training participants transition into applying these learned behaviors on the job.

According to Perkins & Salomon (2012), the skills learned during the training should be transferred to the workplace. “Training has little value unless what is learned gets applied on the job, and the subsequent on-the-job performance contributes to key organizational outcomes” (J. Kirkpatrick & W. Kirkpatrick, 2016, p. 4). Accountability drivers enhance transferability of the learned skill on the job (J. Kirkpatrick & W. Kirkpatrick, 2016). Coaching serves as an accountability driver through monitoring, reinforcing, and encouraging (J. Kirkpatrick & W. Kirkpatrick, 2016). Additionally, a trainee’s supervisor has a significant effect on the transfer of knowledge and skills learned in training on the job (Bell, Tannenbaum, Ford, Noe, & Kraiger, 2017). Hence, the trainer or direct supervisor can provide a coaching session.

The two individual coaching sessions focused on (1) “Exploring the self through the family of origin,” which helped participants to identify relational patterns from their family of origin and how those patterns influence their sales and service style, and (2) “Exploring the self through daily habits,” helped participants to identify their relational patterns with colleagues and acquaintances and how those patterns influence their sales and service style. Both coaching sessions focused on helping participants to think and act differently by clearing confusions related to theoretical understanding, answering participants’ questions, and identifying relational patterns in their families of origin and other relational contexts.

CDS Training Learning Objectives

Three targeted objectives created for this program were based on organizational business needs. They were stated at the beginning of the training as: (1) Participants will be able to manage relational intensity in a calmer and more organized manner; (2)

Participants will gain better understanding of relational patterns; and (3) Participants will be able to establish and maintain emotionally healthier professional relationships.

Training Evaluation

According to James and Wendy Kayser Kirkpatrick (2016), “Around the world, training and development is in a state of crisis” (p. 3). Trainings are costly and time consuming (Bell, Tannenbaum, Ford, Noe, & Kraiger, 2017). Hence, during difficult economical times, training budgets are among the first to be cut (J. Kirkpatrick & W. Kirkpatrick, 2016). In actuality, proper training can help improve an employee’s qualifications, improve their customer satisfaction, and increase profitability for the stakeholders (Case, 2011; Engels, 2011; Gignac et al., 2012; Newell & Plank, 2012; Spencer, 2017a; Stock & Hoyer, 2005). Training evaluation can demonstrate the value of the training to the organization so that stakeholders can make informed decisions about a training’s usefulness. In this realm, evaluation is the most important part of training development (Biech, 2016).

The future success of sales training is in three major areas: content development, delivery, and evaluation (Lassk, Ingram, Kraus, & Di Mascio, 2012). The importance of training evaluation was always minimized (Biech, 2016). Evaluation was viewed as final step, but in actuality, evaluation must begin in the development phase and never stop (Biech, 2016). Before the training program is developed, the trainer must identify the purpose of the training, clarify specific expected results, and determine what trainees must do in order to accomplish those goals (J. Kirkpatrick & W. Kirkpatrick, 2016). This will also help set concrete expectations for what should be evaluated.

Research Question

The goal for this research study was to evaluate the CDS training program in terms of its effectiveness in providing knowledge and application of relational skills in the automotive service environment. Specifically, this research sought to determine whether the CDS training program helped associates to be more thoughtful and reflective of the relational patterns. The New World Kirkpatrick Model developed by James D. and Wendy Kayser Kirkpatrick (2016) was utilized to evaluate the CDS training.

Organizations invest large amounts of resources in training but rarely obtain the data to justify that the investment was worth the cost (Pilar, 2010). This study was designed to evaluate the CDS training program. The program aimed to help automotive personnel from the Service and Parts (Fixed Operations) department to enhance relationship management with their customers. In this study, the CDS training program emerged out of three Bowen Family Systems Theory concepts: differentiation of self, chronic anxiety, and relational triangles. This CDS program provided basic understanding and application of Bowen concepts on relational dynamics and applied them in the automotive service industry.

The ability to reflect on and manage levels of differentiation, chronic anxiety, and relational triangles in the emotional system allows individuals in organizational environments to create and sustain positive and productive relationships (Bregman & C. White, 2011b; Engels, 2011; Fox, 2008; Fox & Sheridan, 2007; M. Kerr, 2011; Norton, 2011; Papero, 2014; Romig, 2011; Rosenberg, 2013). Hence, my research question was, “Does the Calm-Driven Service (CDS) training program help automotive service professionals to enhance their ability to relate to their customers in a thoughtful and reflective way?”

CHAPTER III: METHODOLOGY

Evaluation of the Calm-Driven Service (CDS) Training Program

The CDS training program was designed to help participants establish and manage positive ongoing relationships with their customers and coworkers. This is done through the introduction to three Bowen theory concepts: differentiation of self, chronic anxiety, and relational triangles. The program was evaluated through utilization of four levels of evaluation from the New World Kirkpatrick model: reaction, learning, behavior, and results.

Research Question

The overall research question for this study was, “Does the Calm-Driven Service (CDS) training program help automotive service professionals enhance their ability to relate to their customers in a thoughtful and reflective way?” The seven follow up questions helped to answer this question (Appendix A). Those seven follow up questions were divided into two categories. Four questions explored the benefit to the participant and three questions explored the benefit to the dealership.

Research Participants

For the purpose of this study, I worked with service associates from the Fixed Operations (Service and Parts) department at a franchise automotive dealership. Specifically, I worked with two departments under the Fixed Operation department: (1) Traditional Service Drive department and (2) Express Service Drive department. Participants were selected from the Automotive Group in South Florida (this name for the organization was invented to protect the privacy of the training participants) (see Appendix B for the Letter of Intent). I, the researcher, was able to establish contact with managers from the Automotive Group in South Florida before the study began. I encouraged managers and participants to contact me before, during, and after the study by providing them with my personal cellphone number and university's email address, as well as through face-to-face interactions. Managers and participants were informed that confidential information about the participants would not be shared with the managers.

The participants were solicited through an announcement at the dealership, which was delivered by managers. It was agreed that management from the participating dealership would inform the researcher about who wanted to participate in the CDS training program. Participants were asked to participate in six group-training sessions. The group- training sessions lasted approximately an hour each. Upon completion of the six group-trainings, some participants were asked to volunteer (see Appendix C for sign in sheet) for two coaching sessions, at least once a month, for two consecutive months (see Appendix D for individual training calendar). The individual-coaching sessions lasted approximately sixty minutes each. This was done to evaluate participants' understanding of the relational concepts and to ensure application of those concepts on the job.

The program ran for 120 days (Appendix E). The six-week group-trainings began in the first week of December, 2017 and were completed the first week of February, 2018. Then, the first individual-coaching sessions began in the middle of February, 2018 and the last individual-coaching session took place at the end of March, 2018.

The participants of the training program were not required to participate in the research study; however, all participants agreed to participate in the research as well. In order to be included in the research, participants had to be: over 18 years old, employed by the participating dealership, work as an automotive service advisor, speak English, and be able and willing to participate in the full length of the program. Participants would have been excluded from the study if: their work did not include direct communication with service customers, their behavior negatively affected the emotional safety of other participants, they missed more than two training sessions, or they lost employment with the dealership. The participants were not be discriminated against based on their history of employment at the dealership or cultural and diversity differences, including race, color, gender, national origin, sexual orientation, gender expression, age, religion or creed, body ability, socio-economic status, pregnancy, ancestry, marital status, political beliefs and affiliations, military service, and veteran status. I clearly defined to the participants that their participation was voluntarily and would not affect their employment.

I, as the researcher, intended to provide the program logistics form (Appendix F) for the participants who did not wish to participate in the research, yet still would like to participate in the training program. However, all training participants expressed desire to participate in the research. The participants were provided with an informed consent form (Appendix G) before the training to ensure that participants were protected (Orticio, 2009). Participants were informed about limitations and rights to privacy, risk protection, confidentiality, and honoring protections (Creswell, 2009; Creswell & Poth, 2017). The consent form for this study included the researcher’s name, university affiliation, mailing address, the participant’s eligibility criteria, that it was voluntarily research, the risks and benefits of the study, and information on who to contact for additional information.

The New World Kirkpatrick Evaluation Model

The New World Kirkpatrick model was utilized to evaluate whether the CDS training program could help automotive service professionals enhance their ability relate to their customers in a thoughtful and reflective way. The New World Kirkpatrick evaluation model was developed by James D. and Wendy Kayser Kirkpatrick in 2009 (J. Kirkpatrick & W. Kirkpatrick, 2016; Moreau, 2017). It is based on four levels of the Kirkpatrick evaluation model—reaction, learning, behavior, and results—developed by Donald Kirkpatrick in the 1950s (J. Kirkpatrick & W. Kirkpatrick, 2016). The Kirkpatrick model provides systemic evaluation of a training program that accounts for multiple levels of training effectiveness (D. Kirkpatrick, 1959a, 1959b, 1960a, 1960b, 1998; D. Kirkpatrick & J. Kirkpatrick, 2006).

Reaction level (Level 1) measures the degree to which the participants found the training favorable, engaging, and relevant to their professional needs (D. Kirkpatrick, 1959a, 1998). Learning level (Level 2) measures the degree to which the participants gained the intended knowledge, skills, attitude, confidence, and commitment (D. Kirkpatrick, 1959b, 1998). Behavioral level (Level 3) measures whether participants are able to apply obtained knowledge in their professional environment (D. Kirkpatrick, 1960a, 1998). Results (Level 4) refers to the outcomes of the training on the professional environment overall (D. Kirkpatrick, 1960b, 1998).

The simple to use and straightforward Kirkpatrick evaluation model "became the most widely used training evaluation model in the world" (J. Kirkpatrick & W. Kirkpatrick, 2016, p. xvii). The Kirkpatrick model proved to be effective in measuring sales, customer service, and leadership trainings (D. Kirkpatrick & J. Kirkpatrick, 2006;

Lacerenza, Reyes, Marlow, Joseph, & Salas, 2017; Popp, Simmons, & McEvoy, 2017; Tan & Newman, 2013; Taylor, 2016). However, the model's dated practices fail to create and demonstrate the organizational value of trainings (J. Kirkpatrick & W. Kirkpatrick, 2016; Moreau, 2017; Reio, Rocco, Smith, & Chang, 2017). According to Tan and Newman (2013), "without evaluating sales training effectives, retailers would not be able to make the necessary revision and renewal efforts to their sales training programs so that training can continuously be effective, accountable and significant to their organizations" (p. 692). The biggest challenge of the Kirkpatrick model is that the full model is rarely used past the first two levels, meaning the two levels that measure changes in work performance and business results are being ignored (Moreau, 2017; Pulichino, 2007; Reio, Rocco, Smith, & Chang, 2017). The common reasons for this error is that Levels 3 and 4 of the Kirkpatrick model require more sophisticated evaluation skills, as they are more complex, more time consuming, and consequently more expensive (Pulichino, 2007; Reio, Rocco, Smith, & Chang, 2017).

Despite its recent introduction, the New World Kirkpatrick Model is already beginning to demonstrate successful applications of training evaluation in leadership, coaching, customer service, and sales training programs (Glynn, 2018; J. Kirkpatrick & W. Kirkpatrick, 2016; Moreau, 2017; Subramain, 2016; Woodhouse, 2016). Its success could be related to the new model's unique and simplified application practices. The New World Kirkpatrick Model begins with the end in mind (J. Kirkpatrick & W. Kirkpatrick, 2016). This way, the most important information—the training program outcomes on organization as a whole—is evaluated first. In other words, even before the training program is developed, the model first considers the leading indicators that lead to the training results (Level 4). Then, it identifies what needs to occur on the job to produce those leading indicators (Level 3). Next, the model considers what training and support is required for the intended performance (Level 2), and what could be found satisfactory and useful by the training participants (Level 1).

In the New World Kirkpatrick Model, each level implements another, rather than being viewed as an individual step (J. Kirkpatrick & W. Kirkpatrick, 2016). There is no concrete separation between evaluation steps. They work simultaneously, even though they hold different functions. Yet, the model prioritizes Level 3 among all other levels because without on-the-job application of learned skills, the training does not contribute to the organizational results (J. Kirkpatrick & W. Kirkpatrick, 2016).

James and Wendy Kayser Kirkpatrick (2016) also stress that the most time and effort needs to be dedicated to the post-training follow-up (50% of time and effort), while the design, development, and delivery of the training (25% of time and effort) is equally important to the pre-training preparation (25% of time and effort). This is different from the traditional Kirkpatrick Model, which allocates most of its focus on design, development, and delivery of the training (90%), while a small amount of time and effort is dedicated to the pre-training preparation (5%) and post-training follow-up (5%) (J. Kirkpatrick & W. Kirkpatrick, 2016).

Each step of the training is evaluated, from the development of the program until the post-training follow up (J. Kirkpatrick & W. Kirkpatrick, 2016). The New World Kirkpatrick evaluation model offers the flexibility of being constantly modified according to the needs of the training program (J. Kirkpatrick & W. Kirkpatrick, 2016). This model allows and encourages evaluators to obtain feedback on an ongoing basis so that necessary adjustments to the program could be implemented before it is too late (Biech, 2016). This is different from other methods of evaluating training effectiveness. For instance, the action research methodology approach is suited for the evaluation of the training in the sales environment (McDonnell & McNiff, 2014). However, in the action research methodology approach, the analysis and modification of the training program happens after the training program has been implemented (Herr & Anderson, 2015). Therefore, the New World Kirkpatrick is more appropriate for evaluation of the CDS training program as it provides an ongoing training evaluation.

Some try to quantify the relational dynamics from the Bowenian lens in a relational system by utilizing the Personal Authority in the Family System (PAFS) questionnaire (Bray, Williamson, & Malone, 1984), which was previously applied successfully in the structure of religious organizations (Kang, 2000; Rovers, 1996; Walker, 1997). However, the PAFS questionnaire is not applicable for the evaluation of the CDS training program because it does not provide systemic evaluation of the training impact on the organization like The New World Kirkpatrick does.

The New World Kirkpatrick model provides a system where the researcher does not have to wait for the end of the training to apply the feedback and work toward improvement of the training (J. Kirkpatrick & W. Kirkpatrick, 2016). Improvement of the training can arise consistently. The rapidly changing sales environment of a dealership requires a training program that would be able to adjust to the dealership’s needs on an ongoing basis (Beresford, 2014). Consequently, the flexibility of the New World Kirkpatrick evaluation model makes it the most appropriate and practical methodology for the evaluation of a training in an automotive sales and service environment.

Data Collection

In order to answer the research questions, the data for this study is collected from five sources: (1) during-the-training surveys; (2) informal observations, which would be recorded in my personal journal; (3) semi-structured interviews in the form of coaching sessions; and (4) Customer Satisfaction Index (CSI) scores. Diversifying methods of data collection provides richer information about participants' reactions to the training (Level 1), learning of the participants (Level 2), participants' implementation of the behavior on-the-job (Level 3), and overall results on the dealership environment (Level 4).

Stakeholder Expectations

The New World Kirkpatrick Model begins evaluation of the training with establishing clear expectations by the organization about the training (J. Kirkpatrick & W. Kirkpatrick, 2016). Additionally, involving the stakeholders in development of the program is another way to create a positive job climate toward the training (D. Kirkpatrick & J. Kirkpatrick, 2006). For the purpose of this study, the stakeholders are the owners and the management team of the Automotive Group in South Florida. The overall goal of the stakeholders is to become the number one volume dealer (Case, 2011). According to Case (2011), "Before you can be the biggest you have to be the best" (p. 165). This is because "volume sales and customer satisfaction go hand-in-hand" (Case, 2011, p. 107). Being the best includes being the best to the customers and to the employees. This is because satisfied associates generate satisfied customers and new business opportunities (Case, 2011; Lutz, 2016). The owners of the participating dealership aim "to make sure that all of our associates are always happy in order to make every customer happy, every time" (Case, 2011, p. 88). Positive relationships with customers could: lead to a positive image of the organization in the community; increase repeat sales and service visits; improve teamwork within and between departments; improve performance of service managers; increase retention of existing customers; increase sales; and increase profit (Bagozzi et al., 2012; Case, 2011; Gountas et al., 2014; Lederman, 2011; Lutz, 2016; Nath, 2017; Rajagopal et al., 2010; Sanderson, 2016; Sanderson & Edwards, 2014; Skrobot, 2000). Therefore, the stakeholders' expectation for the CDS program is for the service managers to enhance their ability to manage relationships with their customers in a positive and productive way (Table 1. Part A).

The Automotive Group in South Florida Philosophy

The CDS training program aimed to meet the Automotive Group in South Florida Philosophy through helping the associates to manage relationships effectively (for the complete Automotive Group in South Florida Philosophy statement, see Appendix H). The ability to manage relationships with customers in a positive and productive way could help the Automotive Group in South Florida to reach their company's goals in three categories: customers, associates, and company. Specifically, this could provide excellent customer service by creating an emotionally pleasant atmosphere and improving the work environment through communication in a calmer and more thoughtful way with colleagues. As a result, the company could provide opportunities for growth and encourage associates to grow through training and coaching.

Kirkpatrick's Level 4: Results

Trainings are performed in order to demonstrate results and contribute to the mission accomplishment (D. Kirkpatrick & J. Kirkpatrick, 2006; J. Kirkpatrick & W. Kirkpatrick, 2016). Results refer to the outcomes of the training on the professional environment overall (D. Kirkpatrick, 1960b; D. Kirkpatrick, 1998). James and Wendy Kayser Kirkpatrick (2016) define Level 4 Results as, “The degree to which targeted outcomes occur as a result of the training and the support and accountability package” (p. 60). The support and accountability package plays a crucial role in whether the new behavior will be transferred on the job (J. Kirkpatrick & W. Kirkpatrick, 2016). An accountability package could include management support, ongoing coaching, and co-workers’ support (Table 1. Part B). “If you can create an environment where people feel like team players contributing to a common goal, they’ll perform simply for the sake of the team” (Case, 2011, p. 92). The owner of the Automotive Group in South Florida shared that the way their company ensures commitment from their associates is by hiring and training managers that can lead their associates to the organizational mission (Case, 2011). According to Baker and Titelman (2011), without structured support for ongoing application and practice of the newly obtained knowledge, short weekend workshops have little carryover effect. Associates who feel supported by the company’s management and other employees tend to perform better (Gountas et al., 2014).

The New World Kirkpatrick Model evaluation of Level 4 starts with the assessment of the stakeholders’ desired outcomes, assessment of evaluation methods that are already in place, and setting objectives. The overall goal for the stakeholders of this study is to become the number one volume dealer by enhancing service associates’ ability to manage relationships with their customers in a positive and productive way. The achievement of an overall goal consists of multiple smaller achievements, which James and Wendy Kayser Kirkpatrick (2016) call leading indicators. “Leading indicators: short-term observations and measurements that suggest that critical behaviors are on track to create a positive impact on the desired results" (J. Kirkpatrick & W. Kirkpatrick, 2016, p. 60).

The two types of leading indicators are internal and external (J. Kirkpatrick & W. Kirkpatrick, 2016). Internal and external leading indicators need to be identified and evaluated in order to assess the overall effect of the training program. Internal leading indicators arise from within the organization (J. Kirkpatrick & W. Kirkpatrick, 2016). In the automotive service industry, internal leading indicators are expressed by: increased sales, increased profit, stronger teamwork and collaboration within and between departments, improved quality and quantity performance, increased retention of personnel, increased individual and team productivity on the job, and a decrease in service and sales time. The four follow up questions that explored the benefits for the participant (internal leading indicators) are: "Are service associates (participants) able to manage relational intensity in a calmer and more organized manner?" "Did the service associates (participants) gain a better understanding of the relational patterns?" "Are service associates (participants) able to establish and maintain emotionally healthier professional relationships?" and, "Does the CDS training program improve associates' job satisfaction?"

External leading indicators arise from outside of the organization (J. Kirkpatrick & W. Kirkpatrick, 2016). In the automotive service industry, external leading indicators are expressed by the following: increase in customer satisfaction, increased retention of customers, brand recognition, positive image of the organization in the community, and sales from referrals. The three research questions that explored benefits for the dealership (external leading indicators) are: "Does the CDS training program improve customer satisfaction?" "Does the CDS training program improve associates' retention?" and, "Does the CDS training program increase sales/profit?" (Table 1. Part C).

Table 1. *Goal, Action, and Evaluation of Level 4: Results*

A. Goal. The desired outcome was to, "Become the number one volume dealer," which was planned to be accomplished by improving service associates' ability to relate to their customers in a thoughtful and reflective way. Hence, the research question is, "Does the Calm-Driven Service (CDS) training program help automotive service professionals to enhance their ability to relate to their customers in a thoughtful and reflective way?"

B. Action. The desired goal is achieved through:		
(1) CDS training program	(2) Support and accountability package through management involvement in transferring the behavior on the job	(3) Skills of the Trainer

C. Evaluation. Internal and External Leading Indicators identify progress toward the goal					
Internal Leading Indicators arise from within the organization			External Leading Indicators arise from outside of the organization		
(1) LI: Relationally skilled associates	(2) LI: Improved job satisfaction	(3) LI: Improved internal relationships	(4) LI: Increase in sales/ profit	(5) LI: Increase in CSI score	(6) LI: Improved associate retention

The traditional Donald Kirkpatrick Model states that in order to evaluate Level 4 Results, the behavior before the training must be compared with the behavior after the training (D. Kirkpatrick, 1998; D. Kirkpatrick & J. Kirkpatrick, 2006). The New World Kirkpatrick Model is different. It states that the satisfactory outcomes demonstrated in the internal and external leading indicators are sufficient in providing evaluation of Level 4

(J. Kirkpatrick & W. Kirkpatrick, 2016). Therefore, the answers to the seven follow up questions (four questions that evaluated internal leading indicators and three questions that evaluated external leading indicators) were sufficient to evaluate overall stakeholders' expectations.

Level 4 Results should be measured as a process, not an event (J. Kirkpatrick & W. Kirkpatrick, 2016). The results express themselves in a variety of leading indicators. In order to evaluate results, The New World Kirkpatrick Model encourages incorporating existing evaluation tools, such as Customer Satisfaction Experience Index (CSI). Automotive manufacturers utilize a CSI score to assess customer satisfaction with the service (J.D. Power, 2018). For the purpose of evaluating Level 4 Results in this study, I analyzed the CSI score. The data was collected for eight months: three months before the training, four months during the training, and one month after the training was implemented (see Appendix E for data collection timeline). The data was collected from the stakeholders and service managers. The CSI score's highest measurement is 100 percent. The level of the CSI score defined as a satisfactory and desired by the automotive manufacturers is above the national average, which constantly fluctuates around 90 percent (Table 10).

Three desired outcomes for this study were for the participants to: (1) achieve no less than the national average on their average CSI score for the four months during the training and one month after the training had been implemented, (2) achieve the average dealership CSI after the training that is no less than the average dealership CSI score before the training had been implemented, and (3) achieve a higher average CSI score for the month after the training was complete than the average CSI score for the three months before the training took place. The behavior needs time to be learned and expressed on the job (D. Kirkpatrick & J. Kirkpatrick, 2006; J. Kirkpatrick & W. Kirkpatrick, 2016). This is why, during month after the training, rather than focusing on the CSI score during the training months.

Kirkpatrick's Level 3: Behavior

The Level 3 Behavior measures whether participants are able to apply obtained knowledge in their professional environment (D. Kirkpatrick, 1960a, 1998; D. Kirkpatrick & J. Kirkpatrick, 2006; J. Kirkpatrick & W. Kirkpatrick, 2016). In the New World Kirkpatrick Model, this level includes two steps. The first step is identifying specific, observable, and measurable critical behaviors that will influence Level 4 Results (J. Kirkpatrick & W. Kirkpatrick, 2016). The second step is setting an ongoing performance improvement system, which includes: monitoring, reinforcing, encouraging, and rewarding (J. Kirkpatrick & W. Kirkpatrick, 2016). This is done to secure practice of newly learned behaviors.

Specific, Observable, and Measurable Critical Behaviors. Processing and applying Bowen family systems theory concepts provides clarity about emotional processes and ways of managing personal reactivity (Hargrove, 2011), which enhances individuals' functioning and improves human relationships. A Bowen based training could lead to self-improvement of an individual and bring benefits to the organization (Spencer, 2017a). When introducing Bowen Family Systems Theory concepts to adult learners, Baker and Titelman (2011) place an accent on encouraging learners to think in a different way about human relationships and behavior in general, as well as realize their own role in relationships and behavior in particular (Baker & Titelman, 2011). Thinking in different ways encourages individuals to behave in a different way (Baker & Titelman, 2011). From the natural systems theory perspective, the behavior that affects an individual's relationships with customers and co-workers in organizations is the ability to relate to others—maintaining emotional connection to the system—while defining the self in the system (Papero, 2011, 2014; Spencer, 2017a, 2017b). Therefore the specific, observable, and measurable behavioral indicators focused on evaluating whether the participants were able to relate to other individuals in a different way due to (1) thinking in a different way about human relationships, and (2) realizing their own role in relationships and behavior in particular (Table 2).

The desired outcome was that improvement of this behavioral skill would have a positive effect on the relationships between service personnel and customers, which would allow them to communicate in a calmer and more thoughtful way with their customers and colleagues. Therefore, two indicators that measured behavioral change were (1) informal observation, which were recorded in the trainer/researcher's journal, and (2) semi-structured interviews in the form of two individual-coaching sessions.

I provided individual-coaching sessions to accomplish the following: assess participants' understanding and application of the Bowen Family Systems Theory concepts on-the-job; refresh participants' knowledge about Bowen Family Systems Theory concepts; and answer their questions. During coaching sessions, I specifically focused on identifying ways in which the Bowen Family Systems Theory concepts helped the participants to: (1) think in a different way about human relationships, and (2) realize their own role in relationships and behavior in particular. The first coaching session was held within two weeks after participants completed the training, and the second coaching session was conducted a month after the first session (see Appendix E for data collection timeline). Appendix I and Appendix K list questions that helped to evaluate a participant's learning and behavior during the training program, as well as provided a platform to clarify participants' questions and theoretical understanding (Table 2).

Table 2. *Level 3: Behavior*

Level 3: Behavior Level 3 evaluates application of obtained knowledge into the participants' professional environment	
Specific, Observable, and Measurable critical behaviors Evaluated whether the participants were able to relate to others in a different way due to (1) thinking in a different way about human relationships, and (2) realizing their own role in relationships, and behavior in particular. Analysis is based on a Natural Systems Theory perspective, specifically concepts of (1) Relational Triangles, (2) Chronic Anxiety, and (3) Differentiation of Self.	**Monitoring, Reinforcing, Encouraging, and Rewarding systems** Evaluated actions taken by (1) the trainer and (2) managers to set a system that would ensure continuation of newly learned behaviors.

Monitoring, Reinforcing, Encouraging, and Rewarding Systems. The second step is setting an ongoing performance improvement system, which includes: monitoring, reinforcing, encouraging, and rewarding (J. Kirkpatrick & W. Kirkpatrick, 2016). Generally, according to Saks (2002), only 40% of information from trainings is transferred to the job. In addition, behavior learned during the training progressively degrades and is less frequently utilized on the job as time passes (Saks & Belcourt, 2006). Setting the support and accountability package for the participants helps improve behavior transfer on the job (J. Kirkpatrick & W. Kirkpatrick, 2016). According to Aguinis and Kraiger (2009), training has a more effective impact when it is bundled with other human resource management practices, rather than standing alone. James and Wendy Kayser Kirkpatrick, in contrast to the traditional Donald Kirkpatrick Model, acknowledge and work with the external and internal factors that contribute to the successes and failures of training outcomes (Brinkerhoff & Mooney, 2016). In their opinion, the external and internal factors of trainings are more influential on the training than the training itself (J. Kirkpatrick & W. Kirkpatrick, 2016).

Internal factors such as accountability drivers can help sustain knowledge transfer into the work environment (J. Kirkpatrick & W. Kirkpatrick, 2016). The purpose of this step is to set a system of accountability so that the training participants secure the practice of a new behavior (J. Kirkpatrick & W. Kirkpatrick, 2016). Monitoring is a system of observation and work review, which provides a sense of importance to the new behavior. It can be performed by a supervisor, training professional, or a peer (J. Kirkpatrick & W. Kirkpatrick, 2016). Service managers and colleagues served as accountability drivers by monitoring each other's progress (Bell, Tannenbaum, Ford, Noe, & Kraiger, 2017). Additionally, for the purpose of this study, I provided the monitoring by meeting with the service advisors during coaching sessions at least once a month for two consecutive months.

Coaching sessions also served as reinforcement. Reinforcement is a reminder for the training graduates of what they are supposed to do and to provide guidance (J. Kirkpatrick & W. Kirkpatrick, 2016). Encouragement is about giving support, confidence, and hope to the training participants related to their learning progress.

Encouragement occurs on the job naturally and consistently when training participants start to notice the benefits of learned behavior (J. Kirkpatrick & W. Kirkpatrick, 2016). Additional encouragement was received through conversations throughout the group-trainings and coaching sessions.

Rewarding is about recognizing and encouraging learned behavior. According to D. Kirkpatrick and J. Kirkpatrick (2006), there are two types of rewards, intrinsic (which include the feeling of satisfaction, pride, and achievement arising from recognition of change in behavior) and extrinsic (which include recognition from others and monetary rewards). Rewards do not have to be financially costly. “Sometimes just having someone notice and mention good performance is even more meaningful than any particular tangible reward” (J. Kirkpatrick & W. Kirkpatrick, 2016, p. 56). For the purpose of this study, participants received a certificate, which recognized their participation. Certificates were awarded at the end of the group training and the end of the individual coaching (Table 2).

The two data sources that were collected to evaluate level 3 Behavior were: (1) informal observation and (2) semi-structured interviews. Informal observations were collected during the coaching sessions and conversations with the stakeholders. Those reactions were noted in the researcher’s individual electronic journal. The semi-structured interviews were collected during coaching sessions. Identifiable data of the participants in the journal and transcripts from the interviews were coded and saved on an encrypted flash drive.

Kirkpatrick's Level 2: Learning

The second level of the Kirkpatrick evaluation model is learning (D. Kirkpatrick, 1959b, 1998; D. Kirkpatrick & J. Kirkpatrick, 2006; J. Kirkpatrick & W. Kirkpatrick, 2016). In this stage, I aimed to measure the degree to which the participants gained the intended knowledge, skills, attitude, confidence, and commitment from their participation in the CDS training program (Table 3). From the New World Kirkpatrick model perspective, evaluation of learning is typically overdone (J. Kirkpatrick & W. Kirkpatrick, 2016). Awareness does not create behavior change (Romig, 2011). Hence, the New World Kirkpatrick model places its focus on Level 3 behavior over Level 2 Learning (J. Kirkpatrick & W. Kirkpatrick, 2016). However, in order to insure successful skill application, new knowledge must be first obtained (J. Kirkpatrick & W. Kirkpatrick, 2016).

Table 3. *Level 2: Learning*

<table>
<tr><td colspan="2">Level 2: Learning.
Level 2 measures the degree to which the participants gained the intended knowledge, skills, attitude, confidence, and commitment from the training program</td></tr>
<tr><td>Formal Learning.
Formal evaluation was accomplished through semi-structured interviews.</td><td>Informal Learning.
Informal evaluation was accomplished through my personal observation and recorded in my journal.</td></tr>
</table>

Bowen Family Systems Theory thinkers like Baker and Titelman (2011) encouraged learners of Bowenian concepts to think in a different way about human relationships while realizing their own role in relationships and behavior in particular (Baker & Titelman, 2011). Hence, the Level 2 Learning of evaluation focused on the participants' learning in relation to (1) thinking in a different way about human relationships, and (2) realizing their own role in relationships and behavior in particular. The participant's ability to apply newly gained knowledge on the job is more significant than ability to correctly answer technical questions about learning material (J. Kirkpatrick & W. Kirkpatrick, 2016). Therefore, I placed an accent on evaluating participants informally, rather than formally. Still, participants' knowledge was evaluated in both formal and informal formats. Formal evaluation of participants' learning was assessed by asking participants, "What information, if any, from the training program did you find most useful to your work environment?" and "What information, if any, from the training program did you find most confusing or irrelevant to your work environment?" This was asked during the semi-structured interview, which took place during the first individual-coaching (Appendix I).

Informal evaluation was accomplished through my personal observation during each group-training session and individual-coaching sessions. I noted participants' understanding of concepts, engagement during group-training and individual-coaching sessions, as well as application of the material on-the-job. Those observations were recorded in my personal journal. Additionally, in order to stimulate informal evaluation of participants' learning, during the group-trainings the participants were engaged in a group discussion that included four questions (Appendix J). Those questions were taken from the Baker and Titelman (2011) method of assessing adult learners who were introduced to the Bowen Family Systems Theory concepts. (1) What concepts from the training program, if any, did you find most useful to your work environment? (2) What concepts from the training program, if any, did you find the most difficult or irrelevant to your work environment? (3) What concepts from the training program have you found the most interesting to you? (4) What concepts from the training program did you find the least interesting to you? [These questions have been modified from the original to meet the work environment context.] This information was also documented in my, researcher's, individual journal.

Kirkpatrick's Level 1: Reaction

Reaction measures participants' reaction toward the training—in this case, the CDS training program—in terms of whether the participants found the training favorable, engaging, and relevant to their professional needs (D. Kirkpatrick, 1959a, 1998; D. Kirkpatrick & J. Kirkpatrick, 2006; J. Kirkpatrick & W. Kirkpatrick, 2016). Participants' reactions to the training could affect their desire to obtain the information (J. Kirkpatrick & W. Kirkpatrick, 2016). Yet, these reactions most often represent the charismatics of the presenter, rather than participants' accountability for applying material on-the-job (J. Kirkpatrick & W. Kirkpatrick, 2016). Hence, assessing participants' reactions to the training consumed the least amount of time and resources (J. Kirkpatrick & W. Kirkpatrick, 2016). Participants' reactions to the training were evaluated formally and informally (Table 4).

J. Kirkpatrick and W. Kirkpatrick (2016) encourage evaluating participants' reactions to the training during the training. The immediate feedback helped to make necessary adjustments right away to learners' concerns, which led to improved engagement and satisfaction (J. Kirkpatrick & W. Kirkpatrick, 2016). Informal evaluation was accomplished through my personal observation during each group-training session and individual-coaching sessions. J. Kirkpatrick and W. Kirkpatrick (2016) suggest keeping evaluation simple by utilizing the instructor's personal observations. In my personal journal, I recorded participants' non-verbal behaviors, such as engagement and enthusiasm of participation in the training and coaching sessions, as well as application of the material on-the-job.

To stimulate informal observation data, during the group-training I asked participants for their feedback by asking them two questions suggested by Baker and Titelman (2011). Those questions were (1) What would you recommend to change or keep the same in my, the trainer's, presentation style to improve your learning experience? [The questions have been modified from the original to meet the work environment context.] and (2) What were positive and negative aspects of the program on your own learning process? (Appendix J). Those questions were asked during the group-training because addressing these questions to the group as a whole helped provide a safer space for the participants to share their concerns with me, the trainer. Participants' answers were recorded in my personal journal.

Formal evaluation of participants' reaction to the training was evaluated in two ways. First, after each group-training session, the participants were asked to answer eight survey questions for the first five group-trainings about each training (Appendix K) and another survey about overall training (Appendix L). Survey is the most common form of evaluating participants' reaction to the training (D. Kirkpatrick & J. Kirkpatrick, 2006; J. Kirkpatrick & W. Kirkpatrick, 2016). The data collected from the surveys was analyzed to help evaluate the overall program outcome, assess participants' reactions to the training, and to identify areas of improvement for future trainings. The data was collected immediately. The immediate feedback allowed the following: identifying potential errors and making necessary changes; adjusting the teaching approach and program content;

improving satisfaction because participants witnessed an immediate response to their concerns; and, improving engagement if distractions and discomforts were resolved.

The second way the participants' reaction to the training was evaluated formally by asking the participants, during the semi-structured interview, "What would you recommend to change or keep the same in my, the trainer's, presentation style, training content, or organization of the training to improve your learning experience?" (Appendix I). This was done to provide an opportunity for the participants who did not feel comfortable speaking up in the group to share their opinion. Additionally, I hoped to send a message that participants were welcome to continuously improve their relationships with me, as a trainer, throughout the training process.

Table 4. *Level 1: Reaction*

<table>
<tr><td colspan="2" align="center">Level 1: Reaction.
Level 1 measures participants' reactions in terms of whether they found the training favorable, engaging, and relevant to their professional needs.</td></tr>
<tr><td>Formal Reaction.
Formal evaluation was accomplished through (1) two types of surveys and (2) semi-structured interviews.</td><td>Informal Reaction.
Informal evaluation was accomplished through (1) my personal observation and (2) group-discussions.</td></tr>
</table>

Data Analysis

In order to answer the research questions, the CDS training program was analyzed on four levels: Level 1, participants' reactions to the training; Level 2, learning of the participants; Level 3, participants' implementation of the behavior on-the-job; and Level 4, overall results in the dealership environment. Five sources of data were analyzed in order to evaluate the training's effectiveness: (1) during-the-training surveys; (2) informal observation, which was recorded in my personal digital journal; (3) post-training semi-structured interviews in the form of coaching/interview sessions; and (4) Customer Satisfaction Index (CSI) scores. Diversifying methods of data collection provided richer information about participants' reactions to the training.

During-the-Training Surveys

Two types of during-the-training surveys were implemented for the purpose of this study. The first during-the-training survey included eight questions focused on evaluating participants' reactions to the training. This during-the-training survey was implemented after each group-training for the first five weeks and asked for participants' reactions about each training day. The responses were measured in a rating scale between 1 and 4. The second during-the-training survey included thirteen scaling questions and two open-end questions that were focused on evaluating participants' reactions to the training. The second during-the-training survey was implemented during the sixth group-training and asked for participants' reactions to the training overall. The responses for the thirteen scaling questions were measured in a rating scale between 1 and 5. The responses for the two open-end questions were analyzed by comparing the answers among all participants.

All surveys were completed via paper-and-pencil. In order to insure honest responses, the surveys were filled out in private, without personal identifiable information, and placed in a joint folder. For the analysis of the during-the-training survey, I compared the answers among all participants. I provided the average result for each question, the average score among all participants, and compared the progression of answers between the six trainings.

Personal Journal

I collected my reflections on informal observations in a personal journal throughout the training process. In this journal, I noted: participants' attitude toward the training (Level 1), knowledge (Level 2), and skills (Level 3); personal observations from the training and on-the-job performances (Level 3); desired changes to the training program (Level 4); and steps that showed success and productivity of the training (Level 4). In the journal, the identifiable data of the participants was coded and saved on an encrypted flash drive.

For the analysis of the informal observation, I reflected on the notes in my journal. I organized my data by identifying codes that were later organized into categories, and eventually found a connecting theme for each participant and among all participants. When I identified a theme, I looked for its evidence in my journal notes. As more data was collected, I compared it to the original collected data in which I looked for similarities and differences between the identified themes. I summarized the data in a way that made it meaningful to me. I provided this reflection while maintaining mindfulness about my personal biases. I compared each theme for its consistency throughout the entire journal; I compared each theme to the others to identify similarities and differences; and I looked for larger connecting themes between those individually identified themes.

Semi-Structured Interviews

Semi-structured interviews were conducted in the form of coaching sessions. Participants' feedback was audio recorded for future transcription and analysis. In order to protect participants' confidentiality, the identified information about each participant was coded. I personally transcribed the data from the audio taped interview sessions with each participant. My goal for the analysis of the coaching sessions was to assess the participants' reaction to the training (Level 1), the participants' learning level (Level 2), and the participants' implementation of the behavior on-the-job (Level 3).

In the transcription process, I aimed to ensure the accuracy of the data and decrease the chances of breaching participants' confidentiality. I assigned to each participant a number, rather than using their real names. I processed the data with a goal of identifying areas of strengths and needing improvement for the CDS training. I read my transcriptions line-by-line—while being mindful of my personal biases—and I organized the data by coding themes—which were aroused from the data—that later were organized into categories, and I eventually found a connecting theme for each participant and among all participants. When I identified a theme, I looked for its evidence in the transcript. As more data was collected, I compared it to the original collected data in which I looked for similarities and differences between the coded identified themes. As with the analysis of my journal notes, I summarized the data in a way that made it meaningful to me. I compared each coded theme for its consistency throughout entire transcripts; I compared each coded theme to the others to identify similarities and differences; I looked for connecting themes between those individually identified themes; and I looked for connecting themes between all participants.

Customer Satisfaction Experience Index (CSE/CSI)

Customer Satisfaction Index (CSI) scores, also known as Customer Satisfaction Experience (CSE), were collected for nine months: three months before the training, four months during the training, and two month after the training was implemented (see

Appendix E for data collection timeline). In order to analyze the results from CSI scores, I compared the average CSI score for two months after the training was completed with (1) the average CSI score for the three months before the training program took place, and (2) with the average CSI score during the training program.

Ethical Considerations

I followed guidelines and recommendations of Nova Southeastern University's (NSU) Institutional Review Board (IRB), which reviews and approves all research involving human subjects that it is conducted in accordance with all federal, institutional, and ethical guidelines (NSU, 2017). Specifically, the professional community of marriage and family therapists identifies ethical and legal guidelines for our profession in order to protect our clients, the public, members of the American Association for Marriage and Family Therapy (AAMFT) community, and the profession as a whole in the AAMFT Code of Ethics (AAMFT, 2015). I adhered to the standards of the American Health Care Association (AHCA) that specifies aspects of HIPAA (the Health Insurance Portability and Accountability Act) Policy and Procedure, which sets the standards for protecting sensitive patient data (AHCA, 2017).

I also adhered to the state regulations and laws, such as Florida Chapter 491 (2016), designed especially for Clinical, Counseling, and Psychotherapy Services; Florida Statute 39 (2012), which defines proceedings relating to children; and Florida Statute 394 (2012), which describes policies and procedures related to Mental Health. I viewed those guidelines as a minimum requirement from me as a therapist, supervisor, researcher, and trainer. Additionally, it was challenging at times to identify the most ethical steps to take when it comes to research practices. That is where engagement in consultation with my colleagues, literature, and research committee members was the most helpful.

I conducted this research process with consideration for the safety and wellbeing of the participants. I ensured participants' understanding that their participation in this study was completely voluntary, it would not affect their employment, and they would be able to withdraw at any time without consequences. I aimed to maintain transparency with the participants, including discussing benefits and drawbacks from participation. Each participant was assured that throughout the training, all information, evaluation, and discussions would be kept confidential and would be used only for the data analysis.

Before the training, potential participants were provided with an informed consent form to ensure that participants were protected (Orticio, 2009). Participants were informed about limitations and rights to privacy, risk protection, confidentiality, and honoring protections (Creswell, 2009). The consent form for this study included the researcher's name, university affiliation, mailing address, the participant's eligibility criteria and that it was voluntarily research, the risks and benefits of the study, and information on who to contact for additional information.

The following measures were taken to minimize any potential risk: (a) discussion of confidential information was conveyed in a private closed setting; (b) I informed the participants that all information collected during this study would be kept for a minimum of thirty-six months after the completion of the study, and upon thirty-six months, I would permanently delete all digitally stored information and shred any written documentation; (c) I advised the participants to maintain confidentiality and privacy to minimize the potential for harm and discomfort; (d) the digital recordings from the semi-structured coaching interviews were kept on an encrypted flash drive, which was stored in my private safe; (e) even after participants were assigned pseudonyms, their voices from the interview recordings could be recognized, which is why access to the recordings was limited to the researcher, research committee, and IRB personnel; (f) all paper documentation that was collected during the study was stored in my private safe; and (g) all direct personal identifiers were removed by me from all documentation with the exception of the adult informed consent form.

The CDS training program contributed to each participant's knowledge of Bowen Family Systems Theory concepts, which could help improve their relationship management in the work environment, home, and everyday communications. Participants received this knowledge free of financial responsibilities. There was minimal risk that psychological or emotional distress would occur. The significant risk to participants that occurred was the loss of time. Therefore, I suspected that the study would have a positive benefit to risk ratio.

Research Validity

Research validity refers to the trustworthiness of the research in terms of its accuracy and reliability (Creswell, 2009; Creswell & Poth, 2017). There are two types of validity: internal validity and external validity (Herr & Anderson, 2015). Internal validity refers to the trustworthiness of the data generated from the research (Herr & Anderson, 2015). External validity refers to the transferability of the research findings to a larger population and different contexts (Herr & Anderson, 2015). To ensure accuracy of the research findings, I shared with the participants, stakeholders, and my research committee the data gathered during and after the research. I assessed their feedback about the findings in terms of accuracy and reliability. To ensure transferability of the research, I began the research by gathering information about previous studies and similar trainings and training evaluations that were applied in different contexts. I analyzed reports about errors and strengths of those trainings and evaluations of trainings. Every training requires some modification based on the needs of the stakeholders. I hoped that detailed descriptions provided by me of the CDS training application and evaluation would allow future researchers, trainers, and corporate coaches to transfer methods from this research into their context.

Self of the Researcher

Researchers' experiences, beliefs, and philosophical assumptions affect the topic they are exploring, what they are paying attention to and what they ignore, and how they are interpreting what they see (Creswell, 2009; Creswell & Poth, 2017). The researcher cannot escape having assumptions and beliefs while conducting research, however, he or she may find it challenging, if not impossible, to identify and state those biases (Bryant, 2017). Yet the researcher should try to state explicitly their assumptions and beliefs (Creswell, 2009; Creswell & Poth, 2017). In this study, I collected the data myself, made sense of the data, and organized it into categories and themes. Hence, it is significant for me to share my theoretical lens and identify factors that could have influenced the research outcomes, such as my personal experiences, biases, and beliefs.

Prior to this research, I worked in the automotive sales environment both as a sales associate and as a trainer. This experience led me to believe that the sales environment could benefit from relational knowledge in order to improve relationships with customers and colleagues. Additionally, this assumption came from my personal experience of being exposed to systemic thinking, particularly Bowen Family Systems Theory, which allowed me to improve my professional and personal relationships. This positive experience led me to believe that other automotive professionals could benefit from exposure to Bowen Family Systems Theory ideas and concepts.

From the Bowen Family Systems Theory perspective, the level of differentiation of the trainer affects the educational process for the students he or she is working with (Lester, 2011; Schur, 2011). My personal presence and level of differentiation as a researcher, developer, and deliverer of the trainings, as well as my internal belief in the benefit and usefulness of the CDS training, could influence and affect the research outcomes. According to Ricks, Williams, and Weeks (2008), sales trainers play a central role in the training process, yet little attention has been paid to their effect on the training programs. My personal passion for the CDS also moved this training through obstacles that arose, obstacles others might not have been willing to resolve.

CDS Training Anticipated Challenges

As this research was conducted in a busy and active sales environment, it was necessary for me as the trainer, researcher, and new member in the organizational system to be able to “think on my feet” while conducting this research project. This was demonstrated by my ability to remain flexible to the changing needs of the trainees and their organization. Remaining flexible throughout this study depended on my ability to transcend the intended educational material to accommodate needs of the moment. Otherwise I would risk being disregarded and dismissed as an outsider who did not understand the organization’s needs.

As this study was applied in a real world business environment, I needed to try to anticipate some issues that could arise during the progress of this study. For instance, stakeholders' expectations of the training program could be misunderstood or changed as the program progressed. In order to efficiently manage changes to the training program, the trainer/researcher and the management team agreed to meet during each training week for discussion of expectations and noted changes to the organizational environment.

In order to retain my flexibility, I anticipated that change would happen and I would actively prepare for those changes as best I can. For instance, despite the training material being prepared for the duration of the training program, I assumed that I would have to modify the training material on a weekly basis to suit the trainees' level of learning and progress. Additionally, I did plan to impose a rigid structure to the training. I informed the participants that I valued their opinion and appreciated their feedback, both during and outside the training. In this way, the participants were not passive recipients of the information that I was providing. Instead, they were active learners whose voice is valid. I kept the training relevant to the trainees based on their responses and expressed desire of where they would want their education to go. This is where my education as a marriage and family therapist helped me to position my trainees as experts of their education and to co-create the educational journey with them. I strived to be active in addressing my participant's needs, rather than imposing information on them.

There are also moments when I intended to stay firm. For instance, I would not tolerate derogatory comments toward any particular group or individual, which would happen not from the place of not knowing but from the place of ignorance. For instance, if someone genuinely does not understand members of the LGBTQ community, I would either respond to those questions of curiosity myself or even suggest to the HR department to host some diversity based trainings, without identifying the curious participant. However, if comments about the LGBTQ community came from a place of ignorance and disrespect, especially if those comments were directed toward another participant, I would have asked that participant to leave the CDS training. This would help to protect the emotional safety of other participants.

CHAPTER IV: DATA ANALYSIS AND PRESENTATION

Three Ingredients of the Training Application

It is evident to me, as a systemic thinker, that the training program does not exist in an isolated state. The training program is a tool for creating a change but in order to utilize this tool to its fullest potential, the environment (dealership) must be favorable and the individual applying this tool (trainer) must be properly skilled. Therefore, to talk about the training in an isolated state would be a disservice to this training program and misleading to everyone who would like to apply this training in the future.

Recent studies describe that learning occurs beyond the boundaries of formal training (Courtright, Colberg, & Choi, 2014) and focus on three elements of training: (1) the organizational context, such as supervisor support; (2) interventions, meaning training content and structure; and (3) characteristics of the person, which focuses on participants' self-efficacy (Bell, Tannenbaum, Ford, Noe, & Kraiger, 2017). I tend to disagree with the movement that the training outcome depends on participants' self-efficacy. Instead, I think that the trainer's skills have a greater effect on the ability to engage participants in an educational process, relate and explain training content, and encourage the participant into applying this knowledge beyond educational settings.

This perspective puts a lot of responsibility on the trainer, which many would try to avoid. It is easier to put responsibility for failures in the educational process on the participants for the trainers who do not wish or are not capable to meet their participants at their educational level. This is like blaming a "resistant" client for lack of progress in the therapy setting. Hence, I stayed away from putting participants in this research project into categories, by analyzing their characteristics, and instead focused on describing what

I see as the three equally important ingredients of the training application: (1) self of the trainer, (2) context of the dealership, and (3) the training program.

Self of the Researcher

Not every marriage and family therapist, or other mental health professional, could copy and paste the CDS training program into a dealership, or other sales environment of their choice, and obtain the same results I describe below. My previous experiences, personal and professional connections, persistence, and understanding of systems thinking gave me a unique view of the world and helped me to overcome objections, stay focused, and keep looking for solutions and creative ways of engagement when others might give up. For example, previous researchers highlighted that prior sales experience and cultural intelligence positively affect an individual's ability to adjust their behavior to help relate to others (Delpechitre & Baker, 2017), which is something I can relate to and I think could had an effect on the success of this research project. I am not saying that applying this training program would be impossible for others. Rather, the unique experience and characteristics of an individual who would like to utilize this training program would affect the training program application, and consequently the results, of the training.

In previous chapters I spoke about my unique qualifications as a trainer for the CDS training program because I have experience working in the dealership environment and I possess systemic knowledge from my education in a marriage and family therapy graduate program. Yet, knowing something is not enough. In addition to knowledge, I also have a strong desire to share my relational skills within the automotive environment. I am thoughtful, methodical, and systemic about creating, finding, and utilizing opportunities, and I am not afraid to take action. For instance, during my master's program at Nova Southeastern University, I would take extra credits, apply to speak at conferences, and stay actively involved in the community. I graduated a semester early with a 4.0 GPA.

Most importantly, during those times I wrote my first book about applying systemic ideas in the world of automotive sales (e.g., Tikhonravova & Khan, 2015). The evidence of my commitment, passion, and creativity of bringing relational knowledge into the automotive environment became even clearer after I began the Ph.D. program in marriage and family therapy. This time, I began to practice applying relational training in the automotive environment, worked on obtaining a license in marriage and family therapy, became pregnant with our brilliant daughter, all while completing the Ph.D. level course work on schedule with a 4.0 GPA.

Consequently, my approach to this dissertation, which represents a foundation for my career beyond the university's walls, received the same level of commitment as everything else in my environment. For a few years I was looking for a way to connect with a franchise dealership that would recognize my value. I would attend career-focused open houses and automotive-based events, meetings, and conferences. I would write articles and participate in speaking engagements. I never stopped looking for opportunities to network and get noticed. So, when I saw the email announcement that the co-owner of the Automotive Group in South Florida (this name for the organization was invented to protect the privacy of the training participants), an inspiring woman, whose presence and positive energy in the room is impossible to outshine, was coming to talk at my university about her professional experience, I knew it would be an opportunity of a lifetime.

At the event, I came up to the co-owner of the Automotive Group in South Florida the moment she walked into the room. She is confident, outspoken, and intelligent in every move. I shared my book with her and asked for a meeting to help me identify how my skills would be the most useful to the automotive environment. Despite her busy schedule, she agreed to talk to me a couple of months after the event.

Those couple of months gave me time to think more clearly about my own ideas and come up with few designs that I thought she would find favorable for the automotive business. During those times, I read the book written by the second co-owner of the Automotive Group in South Florida, about his approach to running the automotive dealership group. This helped me realize that the Automotive Group in South Florida is already promoting a relational approach at their dealerships and clarify areas where I could be useful.

A couple of months after the event at the university moved into another couple of months and I was becoming concerned whether the collaboration with the Automotive Group in South Florida would take place. Uncertainty was the most difficult part for me through this process yet it did not stop my desire to work in the automotive environment. I was continuing to look for research participants and writing the first chapters of this dissertation. Support from my partner and close professors was especially reassuring and encouraging during those times. At the same time, my ideas about the CDS training program became more developed and structured. Therefore, I decided to share those newly developed ideas with Automotive Group in South Florida via email.

I received a positive response from the owners of the Automotive Group in South Florida and they put me in touch with Fixed Operations Director, who is a hardworking, outspoken, kind, and energetic, yet patient businessman. He was groomed for the automotive business since birth. He was able to figure out how to take the best qualities of each of his parents and make them his own. Our first meeting lasted for over an hour where he shared with me his expectations and requirements. After the meeting we continued to work collaboratively for few weeks on structuring the best approach to the training program process and content. Our beliefs about a relational approach to sales and customer service were in sync and I saw the possibility of productive and prosperous work. This is where my ability to match the needs and speed of the automotive dealership became imperative. I remember that period as positive and exciting for me.

Our collaborative work led to a meeting with the General Manager and the Service Department Director of the dealership where the training was implemented. I remember walking into that meeting prepared to defend my thinking about why a relational approach to sales and service could be beneficial to their dealership. I brought training handouts to help me talk about training content (example of the training handout Appendix M), consent forms (Appendix F and Appendix G), and timelines (Appendix E) to help set the date. In other words, I was ready to meet the dealership management team where they are and then exercise my relational flexibility skills to join them at their level so that I could move them toward application of the CDS training at their dealership. This is where my skills as a therapist and as a sales person become one for me. My therapeutic skills helped me to build relationships and my sales skills helped me to sell my ideas.

Context of the Dealership

The CDS training program would not be possible without overwhelming support from the stakeholders and all levels of the management team at the dealership. Management expressed encouragement for the CDS relational training through contagious hope and expectancy, the company's philosophy, helping me as a trainer to feel welcomed at the dealership, providing resources and time, active engagement in the training material, and by sharing their feedback to improve the learning experience of the participants. The support and accountability package demonstrated by the management team played a crucial role in transferring the new behavior on the job.

Hope and Expectancy

The owners expressed positive hope and expectancy about application of the CDS training program in their dealership, which influenced and motivated other levels of management to engage in training. This hope and expectancy could have been stimulated by the owners' belief that the associates "need to be talking to somebody who's not their supervisor" about their professional desires (Wilson, 2014). I partially served that role. This also could be due to our mutual belief in the relational approach to sales and service and my ability, as a marriage and family therapist, to convey to the stakeholders that I will highlight their message about relational based sales, rather than preach concepts that are opposite to their philosophies. Additionally, their support could be stimulated by the owners' positive relationships with the university that I am associated with. This also could be due to the rewards that significantly outweighed the risks. The training was cost free to the dealership and to the participants, and the stakeholders could request to stop the training at any time. All these possibilities are simply my guesses. Yet, the stakeholders’ positive hope and expectancy about the CDS training implementation was obvious and persuasive to other decision makers at the dealership.

Dealership’s Philosophy

All levels of management verbalized support for the relational approach in sales and service environment. This was originally evident in a book written by Case (2011), multiple articles about their business structure (e.g. Case & Case, 2015; Guyer, 2011), and verbal feedback from the dealership’s co-owners, the Fixed Operations Director of the automotive group, the General Manager, and the Service Director of the dealership. For instance, during the meeting with the General Manager and the Service Department Director of the dealership, I felt like I was preaching to the choir. They both spoke about the need for bringing relational understanding to sales and service. They spoke about a desired service experience where customers would be treated as best friends, the relationships would be based on trust and mutual respect, and sales goals would be achieved through the natural progression of positive associates-customers relationships. This thinking is in alignment with the CDS training as it trumps relationships with customers over sales technique, while valuing all other parts of the system that help to grow the business.

Additionally, the Automotive Group in South Florida expressed their belief in treating their associates well and it was evident on many levels. During the training period, I witnessed the dealership preparing a large number of presents for their associates that were supposed to be distributed to them at the end of the year, such as large plasma televisions and other electronics. There were so many presents that the management team struggled to figure out where to place them until the event. There were multiple occasions where the participants expressed their satisfaction with the dealership group and their managers. For instance, during a semi-structured interview, one participant expressed personal perception of the dealership environment,

> Yeah, we honestly never have problems. We always been nice [to each other]. Like we… we… feel like a *family* over there. Like, we go out after work, we play basketball in a week, a day… like during the week and… we go to, like, [manager]'s house and do parties, and stuff like that. Like, we really… even outside from work we really get along.

Similarly, in one of my journal notes I recorded,

> A participant shared that he is very committed to [Service Director] and [manager], "They did so much for me when they did not have to." He also spoke about his willingness for making personal sacrifices for the greater good of the dealership and management team. The participants obviously have a lot of commitment and respect for the dealership's management team.

Notes like these highlight positive mutual relationships at the dealership.

Helping the Trainer to Feel Welcomed

Originally the co-owner of the Automotive Group in South Florida ensured me that she was interested in having a meeting with me despite her busy schedule. Then the Fixed Operations Director helped me to feel welcome by sharing his online access to their existing online training program, which helped me to familiarize myself with the company's existing trainings for sales and service associates. This support was continued when I began providing the training. The Service Director gave me a tour of the dealership and introduced me to the individuals who could help me throughout my presence at the dealership. The management team was also willing to share the data necessary for the research.

The warmest welcome came from the training participants and other associates of the Automotive Group in South Florida who did not participate in the training, yet were always inviting and helpful. On multiple occasions I would record in my journal notes like, “I felt welcomed. I felt wanted as a trainer. They were eager to come to the training.” One associate was invested in helping me grow this training program. This associate shared,

> [An associate] told me before the training, “To sell your training you have to get in touch with the decision makers. When presenting information to them include: this is what we have done, this is the result, those are the referrals, those are the mistakes, and this is what we will do different next time.”

I thought this advice was very genuine and supportive.

Resources

Management provided a conference room, which was utilized for the training purposes four times during each training week. Someone had to make sure that the conference room was available during the times of training, which at times was conflictual, yet we always had the conference room at our access for the training purposes. Additionally, the dealership provided lunch for all associates during all six weeks of the group training, which included adjusting and negotiating different dietary needs of the participants. Those actions speak louder than words. The management team was active in making the CDS training a pleasant and desirable experience for everyone.

Engagement

No matter how busy the co-owners of the company or the Fixed Operations Director were, they found time to read and evaluate my training proposal. The Fixed Operations Director's work ethic was especially inspiring. I would send him a hundred-page document and he would come back to me the next business day with highlights throughout the document and questions prepared for the discussion. The same applies to the managers at their dealership. They all have an enormous amount of responsibilities, yet they would find time to address affairs related to the training and do it in relaxed and welcoming manor. They actively helped to implement, organize, and evaluate the training program process. For example, the management team was active in preparing the training participants, who had to be organized into three training groups.

The service drive director and two service managers were active participants in attending the training. They attended the training at the beginning of the week, before the other associates were introduced to the training material. Managers' desire to help was evident in their eagerness to share their opinions about different CDS training elements. They gave suggestion about how to improve the training material, make it easier to comprehend, and share useful examples that were helpful in sharing with the associates. Additionally, their active participation in the training demonstrated to the other participants the significance of the CDS training for the organization and possibly made them more committed to learning and applying new knowledge on the job.

Ongoing Feedback and Improvement

As I mentioned, the management team was actively engaged in the training development and improvement of the training through providing ongoing feedback. At times they were in complete agreement and support of the training material. For instance, I would record in my journal statements like, “Managers expressed that everything made sense.” Other times, they would share their recommendations about how to make the training program better. For instance, “I asked what should I focus on when I present this material to associates, [Service Director] said that he liked an example with sports, such as Michael Jordan, he mentioned that it was relatable.” Another time, “[A manager] asked not to tell associates that 40% of the time customers’ response is out of their control. Instead, he and other manager offered to say 40% of the time, customers’ responses depend on customers’ previous experience.” Similarly, they would give suggestions about how to make exercises more effective. For example,

> We did “looking into an eye for 60 seconds” exercise, after which [Service Director] offered to make sure that during following training sessions [participants] would stay across from participants they do not know, like from another department. The hope is that it would help [the participants] to expand their boundaries.

Other times they would give me examples that would be more relevant to the associates. “A manager recommended to talk about a finance lady, who closes their orders and makes sure that they get paid on time.”

In the same way, managers were actively involved in organizing the training structure.

> [Participant TSA] said that he would rather have trainings after hours, which the other [participant] said would be a bad idea. [Service Director] also confirmed that it would be a bad idea as after business hours, people would want to go home.

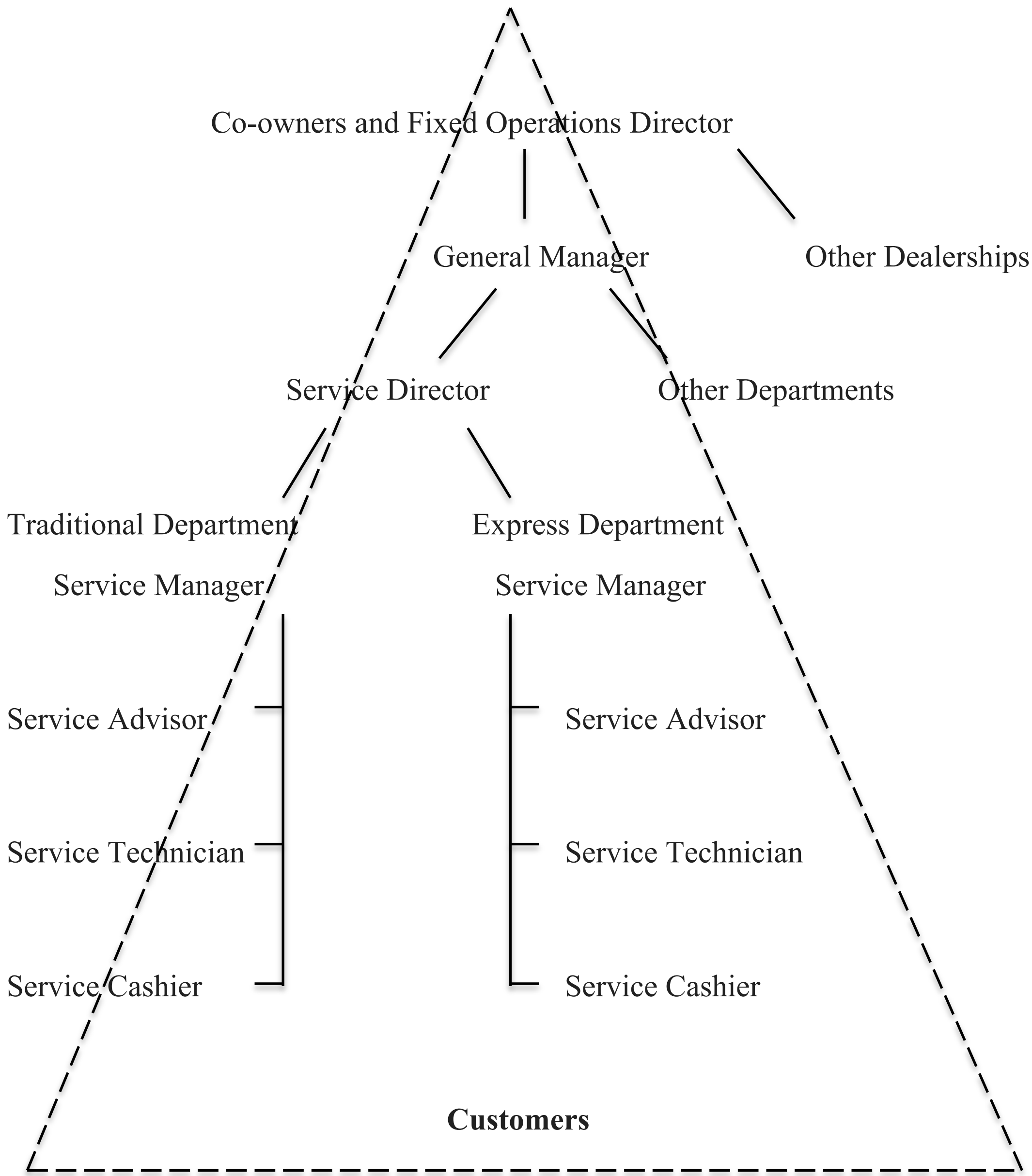

Figure 2. Organizational genogram of the participating dealership

They also took their time to educate me about the dealership structure. In one of the sessions, I engaged managers in creating the dealership's organizational genogram (Figure 2). During the process of organizational genogram development, "[Service Director] also expressed that the relationships between technicians and advisors are important to address." We discussed and tried to generate creative ideas about technicianadvisor-customer relationships. Some discussed ideas include, "[Managers] shared that some technicians do come out to the customers and it works great, while sometimes it blows in our face." The hope was that those discussions would help maintain and enhance idea flow and collaboration among managers beyond the training.

Self of the Trainer

As a trainer, I affected the training in four categories: (1) my knowledge and ability to express the content of the training material; (2) my ability to manage my own anxiety in preparation, delivery, and adjustment of the training to the needs of the participants; (3) my ability to manage emotional systems in the room; and (4) my ability to expand my presence beyond the assigned training time.

Knowledge

I have developed the training program myself, so the information that I was delivering to the participants was familiar to me. I was extensively emerged in studying and applying the theory for past five years, therefore I felt confident with the training content. I also have extensive practice and a desire to participate in delivering the material. I always enjoyed presenting and created multiple opportunities for myself to be part of speaking engagements. Thus, when speaking with the CDS training participants, I could place my focus on helping them understand the content and adjust to their learning style, rather than worrying about transferring the training content in a particular way. At the same time, development of the training content did not come easily. In my journal, I would describe,

> I am being pulled by two organizational structures (academic MFT [the marriage and family therapy field] and the automotive environment), which is blocking my

> creativity when it comes to creating a structure for my training. The way I was able to come out of this block was to stop considering other people's requirements and focus on what I want to say. I focused on the overall outcomes for the participants and how I would rather get there. The goals and desires of organizational automotive and academic MFT environments turned out to be so natural for me that my own voice honored both of those organizations' voices. But I had to hear myself first in order for that to come out.

In addition to searching for my own voice, while trying to meet requirements of academic and sales environments, I had to figure out how to join with the participants so that they would retain the information I was sharing with them. I began by being extensively prepared. In my journal I noted,

> In preparation of the PowerPoints [which I never ended up using] and handouts, I strived to be overly prepared, rather than under prepared. I kept in mind that not all information would be shared. Hearing my participants was more important than to push all my "knowledge" down their throat.

I then figured out that the most efficient way for me to transfer the training content was by trying to relate the training content to the participants' knowledge and experience. In my journal I noted, "To help participants comprehend information easier, I always used life examples, and whatever participants are telling me about their life/work stories, I later used to make a point about some concepts and relational patterns." For instance, I wrote in my journal, "I noticed participants would sit in the same chairs from the day before, so I used that to talk about how our brain likes patterns and does like change."

To learn more about participants, I would give examples of common family patterns and relate them to the training content. These examples stimulated participants to share their own relational patterns. I asked participants to share with me what example they would use and if they were reluctant, I would ask them to “help” me by sharing what examples they would give to their colleague from other days to help them understand the material better.

To prepare for the training week, I would read my previously developed handouts, refer to theoretical textbooks, and watched educational videos developed by others and myself. Deeper into the training, I would write in my journal, “This morning I made a training video for this week, which helped me to be more prepared for the training. Maybe I should make videos for the next week at the beginning of the week?” In my preparations for the training, I would ask myself questions like, “How can I help service advisors slow down and look customers in their eye?” “What makes a person a friend?” and, “Customers believe that you are good when other people say that you are good. How can the customer know that you are good?” I thought answers to those questions would help my participants to grow. I would then write down my own variations of answers to those questions and than ask those questions to my participants to generate thoughtfulness and to learn more about my participants.

In my journal, I would note that during the first week, “there was not much conversation; instead, there was a lot of me telling the info,” which I changed when I begin to “ask participants more questions” and “I did not look into my notes even one time.” Instead, I would go by my memory and focus on my participants, which led to “the training session was looking more like a discussion.” I also added new graphs “because now I know how to connect those ideas." I learned that knowledge is being developed through generation of curiosity, rather than lecturing. In one of my journal notes I wrote, "I am more and more convinced that I need to run my trainings like a group therapy and focus more on activities and reflections rather than lecture giving."

Another way I was trying to relate knowledge to the participants was through constant improvement of the training program though participants' feedback. The New World Kirkpatrick model emphasized that the most time and effort needs to be dedicated to the post-training follow-up (J. Kirkpatrick & W. Kirkpatrick, 2016). Therefore, during the training, each training session was modified based on the post-training follow up. For instance, I would add new examples and change the delivery style based on the feedback from previous training sessions. I also had to change the overall structure of the training because it was evident that participants desired and could benefit from more thorough exploration of Bowen's concept of chronic anxiety. Therefore, the discussion about the concept of chronic anxiety was extended for another day, while the concepts of relational triangles took half a training day, instead of the intended full day.

Similarly, during the last week of the training, I was going over the content from the previous five weeks, which worked for the Monday group. However, the Tuesday group shared that spending half of the training day on repeating what they already knew felt like a waste of time, which was evident in their evaluation forms (Tables 12). Therefore, come Wednesday and Thursday, I offered participants a choice of whether they would like a refresher or would prefer to focus on new content. Both groups chose to focus on new content, which we did, and the satisfaction of that change is evident in the participants' evaluation forms (Table 12).

My Anxiety

As a trainer who conceptualizes the world from the Bowen systems theory perspective, I assume that my emotional functioning has an effect on the emotional functioning of the training participants. Therefore, it is significant for me to begin with awareness, analysis, and thoughtfulness about my own anxiety in the training room before I can attend to the emotional needs of the training system. Throughout the development, delivery, and training follow up, there were many occasions where I had to slow down and reflect on my emotional reactivity, as well as consult with other professionals.

For instance, during the development of the training program, I was concerned whether the collaboration with the participating dealership would be prosperous for both of us. In my journal I described,

> I was very concerned about whether [the participating dealership] would want to pursue the training, as my dissertation is directly connected to their agreement to participate and if they back out, I would have to spend a lot of time adjusting the training to another environment.

I would than describe a feeling of relief, "After the meeting with the GM and Service Director, I felt welcomed and I knew they value my ideas and expertize. My primary goal now was to not screw up when I am talking with the service advisors." In this experience, I was becoming aware of my own biases. For example, "After the meeting, I emailed my training schedule to the Service Director. I know I would not do that if the Service Director was a female. My assumption is that men need more organizational guidance, which is not always true."

I was extremely nervous the first week. I knew that a first impression is very important and I have no room for an error, which was very anxiety provoking. In my journal I wrote,

> I was nervous for three days in a row before the training and my anxiety was not coming down. [My partner] prayed with me and gave me a motivational talk the night before. I felt like I have to do it for him. He invested so much time and energy in helping me grow.

After the training I felt much better but I was still concerned because the participants seemed emotionless during the training. I called my faculty advisor, who said, "[The dealership] wants to make sure that you are not going to disturb their livelihood; that there would not be too many changes." He added, "They are here as a mandated client. They want to know how to get through this training with the least problems.

I was more confident the next day as I already had some idea of what to expect. My confidence had influence on my style of training delivery. In my journal I described,

> Yesterday I was not ready to ask the participants: "Is there any situation where what I am telling you does not apply?" Today, I felt comfortable to be challenged so I asked, but no one challenged me; at least they are not ready to challenge me yet.

At the end of the first week, as participants and I become more comfortable with each other, I would begin to note in my journal,

> I felt very welcomed when I walked into the dealership. People were saying, "Hi," and one salesperson with whom I did not work started a conversation, asking about me. The Service Director was nice and offered to show me around the

> dealership, which helped me better understand the difference between the regular service drive and Express. I got emotional after the training and cried in my car from happiness, as I felt very accepted and supported by everyone. I called Dr. Burnett [my faculty advisor], who was very encouraging as well.

I found support and encouragement from training participants who expressed their satisfaction with the training and my training style. I also found comfort from training managers who would report that they saw positive results from the training program.

At the same time, there were challenging moments through the delivery of the training program. During week two,

> I am stressed all day because [my daughter] fell this morning right before I had to leave. This made [my partner] stressed and he placed all blame for the fall on me. So I showed up to the training physically but emotionally I was down.

That week, I had to figure out how to be an emotionally concerned parent and present as a trainer at the same time.

In the process of delivering the training, I had to reflect on my own emotional reactivity to remain flexible and adaptive to the dealership environment. This helped me see the pushbacks on the training as an organizational need, rather than a direct rejection of the training or myself. For instance, the training was unexpectedly canceled during one training week because the holiday season started a week earlier. Logically I knew that the training had to be pushed to the following month, but emotionally I was concerned. I wrote in my journal,

> When I realized that we would not have training today, I got very upset. Even though logically I knew this was not the case, I started to think that it was my

> fault and that the second training was so bad that no one wanted to come to those trainings anymore.

During the holiday break, I tried to stay active by looking into what I was going to do after the training was over and how I could make money from it. I found comfort in consulting with my faculty, whose calmness and thoughtfulness always helped me become grounded. I was able to find calmness by shifting my energy. During this time I begin to write articles for the Digital Dealer Magazine (Tikhonravova 2018a, 2018b, 2018c, 2018d, 2018e, 2018f, 2018g). Writing articles helped me to stay active in my thinking and creativity. During this time I also began attending class at my university where I could discuss my own emotional reactivity during the training and pick their ideas and perspective about the emotional process of the dealership. Now I had a group of colleagues who helped me to think about the training program application behind the scene.

This stimulated me to engage my training participants in collaborative development of an organization genogram. However, it did not go as expected. In my journal I noted,

> During the genogram I kept trying to find a problem that I would be able to fix. This was for my own benefit, not theirs. They think that they are fine, and they are fine. Managers were able sense my desperation. At one point, the Service Director said, “Sorry you did not hear from us what you were looking for.”

That was a red flag for me, which made me aware that I was serving my needs, rather than the needs of my participants. This awareness helped me change my ways.

Emotional System

Even before the training took place, the training participants wanted to learn more about what this training program was for and about me as person who was possibly a new member of their system. In my journal, I shared that during the initial meeting with managers, the "General Manager wanted to make sure that his thinking and expectations about the training are in aliment with what I am planning to teach." Similarly, training participants were curious about the training program and me. Like management, they wanted to make sure that I was going to add to their existing system, rather than try to change their safe and familiar context entirely. All levels of the dealership's relational system had found safety in the CDS training and me before they were able to engage with me, and eventually learn from me.

The dealership's emotional safety and comfort with the training and me had an effect on each training group (Monday group, Tuesday group, Wednesday group, and Thursday group) and consequently, each training participant. Similarly, each training member had an effect on the emotional system of the training group and the dealership over all. In my journal, I recorded, "Today, I felt like one participant did not want to be there and pushed other participants against the training." Each training group was a configuration of different personalities. In other words, during each training I would work with different emotional systems, as there would be four different groups of individuals. Additionally, even within the same group, there were changes as different members of the group would grow and improve their relational skills at a different speed; they would have different learning styles, and different learning desires. My job was to read participants' emotional reactions and respond appropriately.

My presence in the room went beyond teaching relational concepts; I was demonstrating relational concepts in every moment of my interaction with the participants. The ability to do that depended on my skill to hold larger emotional perspectives and then respond thoughtfully and intentionally. In my work I would strive to help participants to think about their relationships better, which is beyond customer service. I was focused on giving the participants a larger perspective about their relationships. As the training program progressed, I felt drawn to expand my participants' relational flexibility by challenging them and participants begin to be more comfortable in challenging me. This created a push back from some participants. In my journal I described, "I was pushing guys to expand their boundaries, which of course gets them into a place of defense, which makes them do things that are focused on making me stop." In those situations I had to figure out how to lower the anxiety in the room to help the participants become more thoughtful about the relational patterns and learn from the experience.

Participants' attitudes about the training were also influenced by their perception of me as a trainer. During week three of the journal notes, I logged, "[Participants] definitely see me as an expert. They all look up to me. They are listening to me attentively and they respect me." This had an effect on participants' ability to speak up during and outside the training. This meant that sometimes I had to listen for double messages in participants' feedback. For example, during week six, "one participant came up to me and said, 'Someone may find today's training to be repetitive, but I liked it.'" In this message, the participant was giving me a compliment but he also provided crucial information, which gave me a perspective on how others may see the training and allowed me to act accordantly.

Staying Present

To improve my relationships with the training participants, I expanded my presence beyond the assigned training time. I wanted to create an environment where connecting with me would seem natural. I accomplished that by sending participants weekly emails with the training summary, shared with them videos created by me with short overviews of the group trainings for each week, and sent group text messages reminding them about the upcoming training, I shared resources during the tragedy of the Parkland school shooting, and told personal fun stories that connected me better with the participants. Most importantly, I was making myself physically available. I would come before the training and hang out at the service drive and managers' offices, saying, "Hi," and creating small talk, and I would stay after the training so that participants could ask me questions in private. All those ways were part of my continued engagement strategy. I wanted to normalize the fact that I was here, which I think I was able to achieve.

Participants

Out of 19 training participants, there were participants who failed to attend at least four group-trainings (n=1) and therefore were excluded from further training analyses. Participants (Appendix N) were 18 (4 females and 14 males) employees at one of the Automotive Group in South Florida dealerships (3 managers and 15 associates) and service departments (9 from the express service, 8 from the traditional service, and 1 from both departments). Participants' median age group was 35-54 years (Table 5). They described themselves as Hispanic or Latino (50%), Asian (5.6%), Black (16.7%), White

(16.7%), mixed ethnicities (5.6%), and unidentified (5.6%). Participants' median length of employment was 1-5 years (Table 6); the median length working in the field was 5-10 years (Table 7). Participants described their highest level of education as High School Diploma (27.8%), Some College (33.3%), Associates Degree (22.2%), Undergraduate Degree (5.6%), and Graduate degree (11.1%).

Table 5. *Participants' Age*

	Age Group							
	0-17	18-24	25-34	35-44	45-54	55-64	65+	Prefer not to answer
Number of Participants	0	1	4	5	4	4	0	0

Table 6. *Participants' Length of Employment*

	Years working with the company in the current position					
	0-1	1-2	2-5	5-10	10-20	20+
Number of Participants	4	5	3	2	3	1

Because the training program was facilitated in English, participation in the program was restricted to English speakers. Participation in this study was on a voluntary basis, yet the participants had to be employed by the Automotive Group in South Florida dealership and have direct access to working with customers at the service drive. Because the training program was evaluating associates' reaction to the training, participation in the individual training was restricted to 15 service associates who had completed the group-training course, out of which 5 associates volunteered to participate in semi-structured interviews.

Table 7. *Participants' Length Working In the Field*

	Years in this field					
	0-1	1-2	2-5	5-10	10-20	20+
Number of Participants	1	3	2	4	4	4

Participants' attendance was tracked by me, the trainer. Upon meeting participants I asked them to provide me with their name, email, and phone number (Appendix O). I used this form to track attendance for the first 2 weeks. In the third week, I decided to introduce an attendance sheet (Appendix P) to continue motivating participants' attendance. The attendance sheet served three purposes: (1) track attendance; (2) gave participants assurance that their participation was noticed by other parties, such as management; and (3) highlighted the importance of attending the training. On average, 16.7 out of 18 participants (92.8%) attended the full duration of the training during the training day. Additionally, 0.8 out of 18 participants (4.4%) came to the training but attended less than 50 percent of the training during a training day. Therefore, on average 17.5 out of 18 participants (97.2%) attended the training during the training day (Table 8).

Table 8. *Participants' Attendance*

	Week (W) 1	W 2	W 3	W 4	W 5	W 6	Average
Total attendees	18	16	17	18	18	18	17.5 (97.2%)
Number of participants who came but stayed for less than 50% of the training	1	0	0	4	0	0	0.8 (4.4%)

Four Levels of Evaluation and Four Data Sources

In order to answer the research question, "Does the Calm-Driven Service (CDS) training program help automotive service professionals enhance their ability to relate to their customers in a thoughtful and reflective way?" and seven follow up questions (Appendix A), the CDS training program was analyzed on four levels: Level 4, overall results in the dealership environment; Level 3, participants' implementation of the behavior on-the-job; Level 2, learning of the participants; and Level 1, participants' reactions to the training. Five sources of data were analyzed to evaluate the CDS training's effectiveness: (1) two types of during-the-training surveys; (2) informal observation, which was recorded in my personal digital journal; (3) post-training semi-structured interviews from two coaching/interview sessions; and (4) Customer Satisfaction Index (CSI) scores.

Level 4: Results

Level 4 consists of three parts: setting goals/desired outcomes, taking action, and evaluating results. The desired outcome for the stakeholders is to become the number one volume dealer by improving service associates' ability to relate to their customers in a thoughtful and reflective way. Actions that took place to establish the desired outcome were: (1) implementation of the training, (2) a support and accountability package through management involvement in transferring the behavior on the job, and (3) skills of the trainer. The three steps of Level 4 are constantly moving and adjusting, and therefore, do not have a final destination. Rather, the achievement of the desired outcome consists of multiple smaller achievements, leading indicators that suggest critical behaviors are on track to create a positive impact (J. Kirkpatrick & W. Kirkpatrick, 2016). Hence, in order to evaluate the results, Kirkpatrick and Kirkpatrick (2017) utilize external and internal leading indicators that could demonstrate movement toward desired goals (Table 9).

External Leading Indicators

External leading indicators that were utilized to evaluate Level 4 Results include (1) increase and sales/profit, (2) increase in CSI score, and (3) improved associates retention.

Sales/Profit. In order to evaluate whether the CDS training helps increase sales/profit, the study asked, “Does the CDS training program increase sales/profit?” (Appendix A). During the first individual coaching, a participant shared recent profitable sales experience influenced by the CDS training program, after which the participant expressed, “I think I already made what I was going to make throughout the week. Don’t worry [laughing].” Another participant expressed, “And ever since I been coming to this class I got more… well… my income is going back where it need to be.”

However, participant responses were different when, during the second semi-interview, they were asked, “Do you notice any difference in your paycheck since November 2017 (before the training)?” Participant TS2.3J expressed no difference in the paycheck from before to after the training, “It has to go above a certain amount for it to make a difference and it has not.” Participant TS2.2M shared, “I cannot say my numbers went up… because my numbers are the same… My paycheck is the same.” Similarly, participant TS2.1R said, “No. I did not notice the difference in a paycheck” and participant ES2.5A stated, “I mean, I always been pretty good producer but I guess, ah, it is been more consistent. It is more consistent.” Hence, based on participants’ answers, the CDS training did not show immediate financial increase.

Table 9. *Results, Behavior, Learning, and Reaction*

<table>
<tr><th colspan="6">Level 4: Results</th></tr>
<tr><td colspan="6">Desired Outcome:
Become the number one volume dealer by improving service associates’ ability to enhance their ability to relate to their customers in a thoughtful and reflective way.</td></tr>
<tr><td colspan="6">The three pillars of the training program:</td></tr>
<tr><td colspan="2">(1) CDS training program</td><td colspan="2">(2) Skills of the Trainer</td><td colspan="2">(3) Context of the Dealership</td></tr>
<tr><td colspan="3">Internal Leading Indicators (LI)</td><td colspan="3">External Leading Indicators (LI)</td></tr>
<tr><td>(1) LI: Higher skilled associates</td><td>(2) LI: Improved job satisfaction</td><td>(3) LI: Improved internal relationships</td><td>(4) LI: Increase in sales/ profit</td><td>(5) LI: Increase in CSI score</td><td>(6) LI: Improved associate retention</td></tr>
<tr><td colspan="6">Level 3: Behavior</td></tr>
<tr><td colspan="4">Specific, Observable, and Measurable critical behaviors evaluate whether the participants are able to relate to others in a different way due to (1) thinking in a different way about human relationships, and (2) realizing their own role in relationships and behavior in particular. Analysis is done based on a Natural Systems Theory perspective, specifically concepts of (1) Relational Triangles, (2) Chronic Anxiety, and (3) Differentiation of Self.</td><td colspan="2">Monitoring, Reinforcing, Encouraging, and Rewarding system evaluates actions taken by (1) the trainer and (2) managers to set a system that would ensure continuation of newly learned behaviors.</td></tr>
<tr><td colspan="6">Level 2: Learning</td></tr>
<tr><td colspan="3">Formal evaluation was accomplished through semi-structured interviews.</td><td colspan="3">Informal evaluation was accomplished through the trainer’s personal observation.</td></tr>
<tr><td colspan="6">Level 1: Reaction</td></tr>
<tr><td colspan="3">Formal evaluation was accomplished through (1) two types of surveys and (2) semi-structured interviews.</td><td colspan="3">Informal evaluation was accomplished through (1) my personal observation and (2) group-discussions.</td></tr>
</table>

Customer Satisfaction. In order to evaluate whether the CDS training helps increase the CSI score, the study asked, “Does the CDS training program improve customer satisfaction?” (Appendix A). Three desired outcomes for this study were for the participants to: (1) achieve no less than the national average on their average CSI score for the four months during the training and one month after the training had been implemented, (2) achieve the average dealership CSI after the training that is no less than the average dealership CSI score before the training had been implemented, and (3) achieve a higher average CSI score for the month after the training was complete than the average CSI score for the three months before the training took place.

In order to evaluate the CSI score, I looked into the CSI scores from three months before the training, four months during the training, and two months after the training for the dealership and compared it to the national CSI score (Table 10). Before the training, the dealer average CSI score was 93.2 and the average national CSI score was 90.2. This means that the dealer average CSI score was on average 3 points (3%) higher than the dealer’s average CSI score. During the training, the dealer average CSI score was 94.2 and the average national CSI score was 90.7. This means that the dealer average CSI score was 3.5 points (3.5%) higher than the dealer’s average CSI score. This means that the average CSI score difference between the dealer’s CSI score and national CSI score after the training is 0.5 points (0.5%) higher than the average CSI score before the training.

After the training, the dealer average CSI score was 94.9 and average national CSI score was 90.9. This means that the dealer average CSI score was 4 points (4.0%) higher than the dealer’s average CSI score. This means that the average CSI score difference between the dealer's CSI score and national CSI score after the training is 0.5 points (0.5%) higher than the average CSI score during the training and 1.0 points (1.0%) higher than the average CSI score before the training. The results suggest that the CSI score continues to go up or remain high months after the training is complete.

The data shows successful outcomes for all three desired outcomes for the study. (1) The dealership's CSI score after the training was no less than the national average CSI score. (2) The dealer's average CSI score after the training was no less than the average dealership CSI score before the training. (3) The dealership achieved higher average CSI score for two months after the training was complete than the average CSI score for the three months before the training took place.

Table 10. *Customer Satisfaction Index (CSI) Score*

Month, Year	Customer Satisfaction Index **(CSI)**		
	National	**Dealer**	**Difference**
September, 2017	89.8	93.7	
October, 2017	90.4	94.1	
November, 2017	90.5	91.8	
Before the Training Average	**90.2**	**93.2**	**3.0**
December, 2017	90.7	92.9	
January, 2018	90.0	94.4	
February, 2018	91.3	94.7	
March, 2018	90.9	94.9	
During the Training Average	**90.7**	**94.2**	**3.5**
April, 2018	91.0	94.5	
May, 2018	90.7	95.3	
After the Training Average	**90.9**	**94.9**	**4.0**

Before the training took place, the general manger of the participating dealership warned me that it would be challenging to improve their CSI score as their average CSI score is traditionally higher compared to other dealerships and reached the selling effect. Without clamming any cause for the CSI score maintain high results, it is significant to note that the numbers are up by 0.5 (0.5%) and not down during the training and the numbers are up by 1.0 (1.0%) and not down after the training. Additionally, during the second semi-structured interview, some participants reflected on their CSI score. They spoke about their CSI scores with pride. For instance, participant TS2.2M shared, “So now I get more of the good surveys, I think, more response back.” Similarly, participant ES2.5A expressed, “But I did not get a bad survey on a while. So, I guess my customer service improved.”

Associates’ Retention. The dealership I worked with holds a 39% retention rate in comparison to 48% at the other dealerships in their region (Wilson, 2014). The stakeholders expressed, “The turnover is higher than what I’d like” (Case & Case, 2015). In order to evaluate whether the associates’ retention was improved, the study asked, “Does the CDS training program improve associates’ retention?” (Appendix A). None of the training participants lost employment during the training program (personal communication, service department manager), even though in 2013, their turnover rate was 58% (Wilson, 2014), whereas an average annual turnover at dealerships is 45% (Harris, 2011), and 42% for the region of the participating dealership (Wilson, 2014). At the same time, managers from the fixed operation department expressed that they do not consider associates’ retention rate a problem for them (personal communication, 2018). For example, here is the journal note that describes my discussion with managers,

> I was told that turnover is not [company]'s problem. One manager said he always has 1-2 people on training because someone will not last, which is not a problem. He added, he is looking for a service advisor now. Another manager added that it is hard to come by good service advisors and that competitors are trying to take their service advisors.

The training is not solely responsible for a high retention rate. Yet, the CDS training program could be an influence in maintaining high associates' retention.

Internal Leading Indicator

Internal Leading Indicators that were utilized to evaluate Level 4 Results include: (1) improved job satisfaction, (2) improvement of the associates' relational skills, and (3) improved internal relationships.

Job Satisfaction. "You can never assume that associates are satisfied just because they continue to perform" (Case, 2011, p. 87). In order to evaluate whether associates' job satisfaction was improved, the study asked, "Does the CDS training program improve associates' job satisfaction?" (Appendix A). In order to evaluate whether the associates' job satisfaction was improved due to the CDS training program, during the second, and last, individual coaching, the participants were asked, "Do you notice any difference in your job satisfaction since November 2017 (before the training)?" One participant spoke about a change in approaching and viewing relationships with customers, which had an effect on the participant's workload. "Ah, job satisfaction… I always loved what I was doing, ah, but now… with that one little thing [concept learned from the CDS training] it is something fun that I do to people." The participant continued,

> I am trying to know more of individual people, like, I spend more time with them in front of me, like, I let them talk and I let talk, and… I am getting more quality. It is making my job a little easier.

The participant added, “I noticed the difference in how much work I do. So, I am still maintaining what I get paid but I actually doing less. I am taking less cars.” This participant expressed improved job satisfaction in being able to achieve a personal professional goal of making money while improving self-care by taking less of a workload. “That’s my goal, is to make the most out of each opportunity.”

Similarly, another participant shared the same level of job satisfaction, yet pointed out improved attitude about the job,

> Well, well… [breathes out], my job satisfaction. Well, it is the same. Ah, the only thing it is that . . . My whole entire approach is different. It is more, more *fresh*. You know? More, like, “Hey, how you doing? Lets go for a joy ride!” You know, happy go lucky thing.

Likewise, a third participant expressed begin less stressed about professional challenges,

> I, I, I don’t, I normally don’t stress it a lot, because I guess [the job] comes easy to me, but, ah, usually when you have a bad day, when I used to had a bad day, I was like [speaks quietly while breathing out], “Oh my God, I have a bad day.” You always have that fear, since it is a commission job, it is like, “Oh my God. I need to start making money,” and then you know, *my money goes down* and I don’t sweat that anymore. You, like, okay, before I had to finish with a $150 a day, and I would kill myself for that. . . . I don’t sweat that anymore. . . . So, it is like, one day you do bad but the other day you compensate, you know.

A fourth participant could not identify difference in job satisfaction because for this participant, the training started at the same time as a newly found career of service advisor. Yet, the participant spoke about satisfaction that comes from the ability to adjust to the dealership environment as a fresh employee. The participant expressed, “I guess it is getting a little easier.” When the participant was asked to explain where that easiness came from, the participant answered,

> Ahm, I feel like it was a little bit of both [ability to adjust and training]. [The training] helped because that was right when I was starting up here, like on my own, and it was kind of like, I was understanding the process a lot better just, just like a computer wise and everything that I had to do, like doing the numbers and everything, but at the same time it was like perfect timing to come in and start learning all the concepts of, like… personal relationship with the customer at the same time that I am just coming in. So, it is stopped any… if there was a bad habits that was going to form, it did not had a chance to.

A fifth participant did not notice change in job satisfaction, “I don’t think it changed.” Therefore, based on the participants’ responses, there is some mismatch between what participants say and what participants do. On one hand, participants report no change in job satisfaction and therefore, for the purpose of this research, the CDS training would report no change in “job satisfaction” as an internal leading indicator. However, the majority of participants expressed change in their relationships with customers and professional responsibilities, which, as they expressed, made their job a little easier.

Associates’ Relationships with Colleagues. During the first individual coaching, the participants were asked, “Would you say that this training had any effect on your relationships with your coworkers?" This was done to evaluate whether the participants' relationships with colleagues improved due to the CDS training. Participant TS1.2M answered, "Ah, the coworkers? . . . Well. No." Participant TS1.3J shared, "I don't know… Not really." Participant ES1.5A answered, "I mean, I really… I don't know… I guess that we will leave it blank. I really never had problems." Participant ES1.4E added, "I mean, I guess so, but since the training is so focused on the relationships between the customers, you know. But I am sure it did. I just did not really think of that." And participant TS1.1R expressed, "Ah, it made me notice coworkers a little in a different light. . . . Not that I noticed them being different, it is just that I noticed a lot of things about them now." Based on participants' response, it can be safe to assume that even if the relationships with colleagues were shifted, in either a positive or negative direction, that change is insignificant. Therefore, the CDS training did not show any effect on participants' relationships with colleagues.

Associates' Relational Skills with Customers. In order to evaluate whether the associates improved their relational skills with customers, the study asked the following questions: "Are service associates (participants) able to manage relational intensity in a calmer and more organized manner?" "Did the service associates (participants) gain a better understanding of the relational patterns?" and "Are service associates (participants) able to establish and maintain emotionally healthier professional relationships?" (Appendix A). This is why the three targeted objectives created for this program are: (1) participants will be able to manage relational intensity in a calmer and more organized manner; (2) participants will gain better understanding of relational patterns; and (3) participants will be able to establish and maintain emotionally healthier professional relationships. Level 3: Behavior focuses on evaluating change in associates' relational skills.

Summary Level 4: Results

At this time, the study still evaluates results in the CSI score. The study reports no change in (1) the internal relationships, meaning relationships among colleagues, (2) increase in participants' sales/profit, or (3) improved job satisfaction. Additionally, the study is not solely responsible for high retention rate. However, the study reports improvement of the associates' relational skills. The results suggest that one leading indicator is on track to create a positive impact on overall goal, specifically helping the stakeholders to become the number one volume dealer by improving service associates' ability to relate to their customers in a thoughtful and reflective way. Level 3: Behavior describes improvement of the associates' relational skills.

Level 3: Behavior

The goal of Level 3 evaluation is to identify whether the behavior of participants changed due to the training and they are able to apply obtained knowledge in their professional environment (D. Kirkpatrick, 1960a, 1998; D. Kirkpatrick & J. Kirkpatrick, 2006; J. Kirkpatrick & W. Kirkpatrick, 2016). Evaluation of Level 3 consisted of (1) identifying specific, observable, and measurable critical behaviors that influenced Level 4 Results, and (2) setting an ongoing performance improvement system through monitoring, reinforcing, encouraging, and rewarding participants for the practice of newly learned behaviors (Table 9).

Specific, Observable, and Measurable Critical Behaviors

Bowen family systems theory concepts of relational triangles, chronic anxiety, and differentiation of self provided clarity about emotional processes and behavioral changes of participants. Bowenian concepts helped identify shifts in participants' behavior in their ability to relate to their customers by being (1) able to think in defined ways, and (2) realize their own role in relationships and behavior in particular. Increase in thoughtfulness consequently lowers participants' reactivity and improves their ability to communicate in a calmer way with their customers and colleagues.

Thinking and Relating Differently. In the CDS training program, the accent is being placed on helping associates relate to their customers, which improved associates' ability to be relationally flexible, and helped their customers feel welcomed, safe, and understood. Change in thinking changes perception, which leads to change in behavior. Diversified ways of thinking provided participants with options in how they can behave in multiple ways. Their way is not necessary bad or good; it is different. Giving participants more options of how to relate to people expanded their flexibility. Increase in flexibility during the conflict situations lowered participants' anxiety, which helped to continue expanding their thoughtfulness and lower their reactivity. The CDS program teaches participants to be flexible in an informed way.

Evidence of participants being able to relate to their customers differently through thinking differently about customer service relationships is evident from the researcher's journal. There were many situations when I would utilize what is happening in the room to make a point about the training content. For instance, there was a situation where the participant "shared that [the participant] was from the family that was very difficult." I then used this information to talk about this participant's strengths. I made a point that this participant "was trained in [the participant's] family to deal with anxiety very well," which influenced participant's ability to manage anxiety at the service drive. This influenced other participants to begin making similar connections about one's self and each other.

In another example, I utilized a challenging situation that was shared in the room and I was able to engage participants in helping me manage that situation by applying relational concepts.

> [Participant TSW] came all upset. He was not able to pay any attention to the training and seemed disoriented. He was not focusing on what is happening at the time of the training. He said that he wants to go back and talk to [whom ever got him upset]. I invited everyone to give TSW validation and summarizing statements. This could not work better. In 10 minutes he was smiling, felt happy, and understood by his colleagues. This made a huge impact on him and other participants. One of his colleagues responded, "This was therapeutic for everyone."

Situations like that helped this participant to change his future actions and respond to the situation thoughtfully, rather than react based on his emotional state in the moment. The next training day I saw the participants. "TSW said, 'I am perfect,' which was great to hear." It also helped others to notice the immediate effect of their actions on their colleague and think about situation from a different perspective.

At some point, the participants picked up on commenting on observations and utilized them to make their own point during the training, which was a very rewarding experience for me. "So, today [participant ESMD] made a point that I am turning my ring when I am nervous. He feels comfortable to comment on the current situation and think about it from the relational perspective." This is not something that this participant would voice out previously.

Additionally, evidence of participants being able to relate to their customers differently through thinking differently about customer service relationships is evident from the semi-structured interviews. For example participant ES1.4E expressed a shift in relating to customers, "*Definitely*! Definitely having an understanding, kind of like, put myself in [customers'] shoes. . . . In a sense that I, I… I put myself in the customers' shoes… almost instantly, as soon as they walk in." This participant expressed that with the relational approach to sales and service, "Well, I was able to work a little bit more efficiently." The participant explained that efficiency resulted from being able to defuse the conflict from customers,

> To be able to, like, turn around… like ah… customer that was unhappy for whatever reason… to listen to them and understand and let them speak, you know, then relate to them, so… it helps defuse the situation. And from that point, turn it around and then take the conversation itself in the direction that I wanted it to go.

Participant TS1.1R shared,

> [The Calm-Driven Service training] made a lot easier for me to build rapport with the people that come in front of me. It helped me a little more to understand where they are coming from and how to approach them a little better.

The participant added,

> [The Calm-Driven Service training] made me notice coworkers a little in a different light. ‘Cause now I see… I kind of put them in categories. Like one person is more of, like… Like we went over like the “mother figure” that kind of takes care of the service drive, and we have some that kind of like, the jokers that you do not really take too serious. So, it made me look at the people a little bit differently.

Participant ES1.5A described that since the CDS training, the participant learned, “Not like, get like upset, you know” when the customer declined to buy the product, “maybe they… they just don’t have the money now, you know. And it is not like the customers don’t care about their cars and then they don’t buy anything.” The participant added, “Don’t take it personal.” The participant then shared an example of a recent event where the customer said no and the participant had a different internal conversation,

> She is like, “Look I can’t now, whatever no, just write it down for me next time.” And I am like, “Okay.” Like it was *not normal* and then I am, like, you know what, she always buy from me, so… if she is saying no it is because she really can’t, you know. I am kind of like, okay, you know. “Alright. It is fine. Don’t worry about it. We will keep it for next time, just keep in mind, you know… you actually need those things for your…”

Participant TS1.3J expressed,

> [The Calm-Driven Service training] really put things… in a different perspective on how you view handling customers, you don’t just see them as like… ah… you are trying just… get as much money as you can from them. You actually try to,

> ah… you know, ah… I guess more relate to them, than anything, and build, you want to build the relationships. You don't want to just… get them that one time and then…

Participant added, "I feel more, I guess more of like a concern for the customer, actually feel more concern for them because you put yourself in knowing how uncomfortable it is to be here." Participant TS1.2M describes,

> Right, a lot of time, you can't really do that until you really listen because you will miss it. You were there for the, miss it… if you were not really listening. And, and caring. So if you are just saying, "Okay," and you write everything down and you… and you send it, you really did not get the big picture of what the customer is trying to tell you. . . . Right. Until like… listening and find: when did the light come on, what is it doing, you know to be really caring and listening to the customer. That's what I… instead of just writing what they say. You know? Let them know that I do have an eye and that I do care. . . . Instead of just write it, get into more details, when is the noise happening, when… in the mornings or at night.

The participant added,

> The only difference that I have seen that I changed is, ahm, just to listen and care more about the customers instead of just… you know, it is kind of the same thing. That's the difference right there, I think. That changed me more. Go back to the basic. Don't think you know a lot. 'Cause there is more you can still learn.

Realized Own Role in the Relationships. Evidence of participants being able to relate to their customers differently through realizing their own role in the relationships is evident from the researcher's journal notes. For instance, "When I introduced 'You sell the way you are,' [participant] ESE shared how he would give 15% off to almost all his customers but he would sell in bulk. This is the way he buys too." In other words, the participant began to notice how his buying style influenced his selling style and the way he approaches customers.

In another example, the participant spoke about changing relationships with customers through internal realizations. "[Participant] said that he is not as angry any more at the customer who does not buy from him and that he treats people better." This participant spoke about self-reflection in situations that would hurt him financially in the moment, yet help him establish positive ongoing business relationships with customers. Similarly, another participant described the realization of how own actions could influence the relationships with customers. "[Participant] thanked me for helping him view other people's stress like their stress without taking it too personal. He said that he thought, 'Whose anxiety is it?'" This helped the participant to not take other people's anxiety personally and handle the situation effectively.

Evidence of participants being able to relate to their customers differently through realizing their own role in the customer service relationships was also evident from the semi-structured interviews. The participants reported change in their awareness. Participant TS1.1R expressed, in relation to improvement of the training setting, "On our end we would have to actually organize ourselves better." This shows that participant is taking responsibility for different areas at the dealership's organizational structure. As it relates to realizing the role of self in relationships with customers, the participant shared a recent experience of working with a customer from the relational approach,

> It just went easily. They did not even know that that's what I'm doing, so it would be like, "Ah, okay, so what you are saying that you are coming in here because you want to do 'this' right?" They like, "Yeah, yeah, yeah my car is doing this and when I get to the stop light and than it starts vibrating" and you, "Ah wow, really, so you are telling me that when you drive to the stop light and you stop the car, the car starts to shaking and that's what it does? All the time?" "No it does not do that." So I can… *they feel* that I am not listening to them, that I am a part of this conversation that is going on with them.

Participant ES1.4E shared,

> I felt like I would put myself in a customer's shoes more frequently… than I would prior to the training. So I would like of like analyze different situations and try to, ah… see what type of customer they were… so then to try to defuse the situation more accordingly. I just try to handle things a little bit differently than I did before the training, so.

Participant TS1.3J shared a personal experience of practicing relational skills by describing a recent interaction with the customer, "I tried to go an extra mile for him and really like… put it… myself in his place and it was like…" The participant shares that the customer was able to recognize the participants' actions, "He *really saw* the effort… that I was making." This end up helping the participant to make a sale,

> [The customer] talked to a different bunch of dealers and stuff like that, I, we been going on, but… he chose to do everything here and he felt really confident because of my knowledge and everything, and the way I was treating him…

And bring significant financial result,

> [The customer] bought the car for $13,000, like four years ago. And he was willing to, ahh… pay $12,000 to fix it… So, I mean just because I feel like… ahh, I… He spend… He felt so confident with me and everything and the extra effort I put into like find things online for him, not even just here and stuff like that and… He felt confident enough to ah… *hand me another car payment*.

The participant repeated that this was accomplished through focusing on relating to the customer on a personal level, rather than treating the customer as a sales ticket.

> Because I could put myself in his shoes, he felt more like… not like I was trying to, ahh… you know, sell him the most expensive thing… or anything like that, or just not care about what happened, why it happened, or trying to get to the root of the problem. . . . It was more taking the extra effort and he felt more, I guess, he felt more like, ahh… like… like I said, ahh, related to him and everything like that and I sympathized with him… Because how, I am sure, stressful it was for him.

The participant admitted, “I don’t think I… I would’ve… gone to the… the… the lengths before…” and before the training, the participant would assume that the customer would not spend their money on working with the dealer, “Who is in their right mind will spend that type of money.”

Participant TS1.2M described,

> You see the thing is in this business, I think, is that we are in the *people business*. We are in a *healing business*, I think, and a lot of customers, they need a good ear and they need to be *healed* on what’s ever is going on with them. And you touched base on all that. That… that… it is a customer and when they are coming

> they are important ones, they are the one that we need to listen to and take care of. . . . And when I say, "in a healing business," that means you got to heal that situation. You got to listen, you got to find the solution, let them… assure them that everything is gonna be alright, and… and heal them. Heal their hurt, the cut that what… what… a… upon them. . . . And then when they are walking away they are happy. They are smiling. They are like, "Ah, [Participant's name], ah!" and they are gonna go right back to you and they are gonna tell their friends.

The participant added,

> A lot of [customers] just throw me the keys, "I am gone. Call me." 'Cause they trust. It is a trust. That's what I have learned, not to get off the truck, that's what I learned back from here. It is, refreshed my memory to… Not to be so quick and pow, pow, pow, pow, pow, 'cause we have a… we have a lot of customers that come in but, ah… slow down more and spend more time with them… with the customer and listen more. . . . And like I said, I have been doing this for a while, but once I came to this class, it kind of brought back more. Okay. Back to the basic.

Likewise, participant ES1.5A shared,

> I mean, like I said, I… I see more the, the customers' side, like their perspective, you know. Like, I don't know. I feel like a, really, I try to help them, as much as possible, more now than before. Before, I would come in and okay, "I got to make money" and that's it. Now, like… I feel like… I have not got a bad survey in a while… you know, and I am scared because we always get those.

Monitoring, Reinforcing, Encouraging, and Rewarding System

The support and accountability package plays a crucial role in whether new behavior will be transferred on the job and, even more significantly, whether the behavior will be sustained after the training is completed. A system for monitoring, reinforcing, encouraging, and rewarding is a support and accountability package for ongoing performance improvement (J. Kirkpatrick & W. Kirkpatrick, 2016).

Monitoring is a system of observation and work review, which provides a sense of importance of the new behavior (J. Kirkpatrick & W. Kirkpatrick, 2016). During the application of the CDS training for the purposes of the described research, the monitoring was performed by the direct service managers and management at higher levels, who attended the training at the beginning of the week along with the participants and, hence, were informed about what behavior changes to look for. Likewise, the general manager provided monitoring by asking training participants for their feedback about the training, which forced them to pay attention to the training material. Additionally, participants' colleagues accomplished monitoring. This occurred naturally through mutual discussions and peer-pressure. Furthermore, the trainer served in monitoring by evaluating participants' knowledge during the group-trainings, visits to the service drive, and individual coaching.

Reinforcement is a reminder for the training graduates of what they are supposed to do and to provide guidance (J. Kirkpatrick & W. Kirkpatrick, 2016). During the study, reinforcements were implemented by the trainer through continuous contact with the participants outside the assigned training time, as through email follow ups and training videos that described previously learned training content, informal interactions with the participants, the individual coaching sessions that took place after the training was completed, and support from the management team. In one of the researcher's journal notes. I mentioned, "The manager told me that he conveyed to his employees that they should not take other's people anxiety personally. It is not them personally that people are mad at." He said this is something that he learned from the training. It helped him, and now he was reinforcing the same behavior in his employees.

Encouragement is about giving support, confidence, and hope to the training participants related to their learning progress (J. Kirkpatrick & W. Kirkpatrick, 2016). Encouragement occurred on the job naturally and consistently when training participants start to notice the benefits of learned behavior. Additional encouragement was received through conversations that took place during the group-trainings and coaching sessions. In my researcher's journal, I noted examples of encouragement. I gave training participants an exercise to practice relational skills with their family members and/or customers. The following week, I recorded, "Participant TSJ shared that he tried the exercise with his wife. TSJ said she was very happy to know that he cares about her day." "Participant ESE said that he did it with his customers. ESE said, 'When I did it, the work goes faster and customers feels heard.'"

Rewarding is about recognizing and encouraging learned behavior (D. Kirkpatrick and J. Kirkpatrick (2006). For the purpose of this study, participants received a certificate of completion after the group-training and another certificate of completion after individual coaching was completed (Appendix Q). In my journal I recorded participants' reaction to the certificates of completion, which were awarded at the end of the group-training.

> Associates loved diplomas. They were taking pictures of certificates and themselves and begin to share those pictures with others via their phone applications. One participant said, “I will send it to [Service Director] now.” Another, “I will show it to my wife.” It was evident that for many of the associates, the certificate gave them a sense of accomplishment.

I later saw some participants displayed their certificates on the wall near their workstation.

Maintaining Newly Learned Behavior

Some participants were engaged in the second semi-structured interview to evaluate whether the newly learned behaviors were maintained two months after the training was complete. During the interview, the participants were asked, “Would you say that you still utilize the relational concepts that you learned during the group-training?” All participants expressed that they still utilize some concepts that were shared with them during the group trainings. For instance, participant ES2.4E answered,

> Yeah. I would have to say yeah. Not as much as I would want but yeah. . . . It is just very hard to grasp so much information… and put it to use in such a little time. Even though we had a couple trainings, it is still a lot. You know? Ah,… but… I guess I try subconsciously because ah… there are couple things that stuck with me. Like, I am still stuck over the… *putting myself in a customer’s shoes*, which I never did that before, and I still think about it. . . . It is very complex. You know.

The participant spoke about being able to relate to another individual in an authentic and empathetic way, to see their customers as people who are trying to get comfortable and safe in the context of the dealership. The dealership context is very close and familiar to the participants, yet could be frightening to customers. Similarly, participant ES2.5A explained, "Yeah. Like I told you, my favorite [concept] was the, 'The way you buy. The way you sell.'" This concept aimed to help participants find similarities with their customers in an authentic and empathetic way; in other words, to relate to their customers better. The participant stated, "Like I told you the other day, I kind of like see… I put myself in the customers' shoes more now than before."

Participant TS2.3J described his understanding and utilization of the concept which Bowen thinkers call relational triangles. Specifically, he referred to appreciating a relational triangle to maintain flexibility in sales process.

> Yeah. I think it is something that, that, once you start utilizing it and you see the benefits, you don't really turn it off. . . . Ahm, I think the one [concept] that really… that I been using a lot more is when you have more than one person, like a husband and wife, or something, like a boyfriend and girlfriend, they are coming and bring their car together, or even like a father and son, and you try to, ah,… try to figure out which one is a decision maker but you have to, ah, pay attention to both and make it seem like you are not leaving one person out of the decision making process in case you are wrong and that is not the person who is making a choice.

Participant TS2.2M expressed a shift in thinking and an approach to relationships with customers.

> Yes. . . . Like I said, my approach… is differently now. . . . It is more like, I am happy to take care of [customers with complains]. . . . I am more *happier to be in*

a mix. You know what I mean? Just happy go lucky no matter what. No matter if it's negative, if it is, they are upset.

Participant TS2.2M highlighted the concept of differentiation of self. Specifically, this participant spoke about not taking customers' complaints personally, but rather to see those complaints as something related to their own challenges, like car problems. This participant also spoke about being able to maintain their own emotional awareness as separate from customers' emotional awareness, as well as being able to find comfort in different emotional contexts.

Participant TS2.1R spoke about helping customers lower their anxiety to help them feel more comfortable with the service advisor and the dealership, which leads to financially rewarding business transactions.

The one that I do use is when you just, like, when you are interacting. When people are just going and going, and you say things to kind of, like, get them to keep going, like, "Ah yeah. Really! Yeah. Sure!" Things like that I do, do that a lot. I kind of take that as a game, 'cause it keeps them going and going, and they get a little more friendly with you and easier for you, to spend with you.

Likewise, participant ES2.5A spoke about helping customers to feel welcomed, safe, and understood by lowering their anxiety. The participant expressed, "I don't have to, like, push so much this customer to get them uncomfortable, you know. *Maybe like that he's trusting me more*." When the participant was asked where this shift in thinking about customers relationships came from, specifically prioritizing building positive relationships with customers for the long term over making money in one sale at the moment, the participant responded,

> Some of that stuff, the training opened my mind up, but I guess… I don't think it's experience, because I feel like the more experience you have, the more you are trying to go around to make more money on the customers, you know, I don't know, it's… could be, ahm… my commissions are very good for the pay period so I don't have to like sweat it too much, I don't know.

Based on participants' responses, which were taking place approximately two months after group trainings were complete, it was evident that the participants were utilizing concepts learned during the CDS group training. Those concepts help them manage customers anxiety, identify relational triangles, and enhance the level of differentiation to relate to their customers in a more authentic and empathetic way by being (1) able to think in defined ways about human relationships and (2) realize their own role in relationships and behavior in particular.

Summary Level 3: Behavior

The trainer/researcher's journal and answers from the semi-structured interview were analyzed to identifying specific, observable, and measurable critical behaviors that influenced Level 4 Results. It was noted that participants' behavior changed in their ability to relate to their customers by being (1) able to think in defined ways, and (2) realize their own role in relationships and behavior in particular. Most significantly, the newly learned behaviors were maintained two months after the training program was complete. Evaluation of the ongoing performance improvement system was accomplished through assessment of the trainer/researcher's journal notes and indicated a successful ability to monitor, reinforce, encourage, and reward participants for the practice of newly learned behaviors. This had an influenced on the overall desired goals for the organization and stakeholders (Level 4).

Level 2: Learning

Level 2: Learning measures the degree to which the participants gained the intended knowledge, skills, attitude, confidence, and commitment from their participation in the CDS training program (D. Kirkpatrick, 1959b, 1998; D. Kirkpatrick & J. Kirkpatrick, 2006; J. Kirkpatrick & W. Kirkpatrick, 2016). Evaluation of level two was done formally and informally (Table 9) through observations, which were recorded in my journal, and semi-structured interviews.

Researcher's Journal

Informal evaluation was accomplished through my, the researcher's, personal observations and noted in my journal. In my notes, I was evaluating whether the participants were able to gain the intended *knowledge*, *skills*, *attitude*, *confidence*, and *commitment* from their participation in the CDS training program to apply newly gained knowledge on the job.

Knowledge. Even before the training began, participants described great insight about relational patterns. For example, during the first week of my journal notes, I noted an interesting conversation with one participant,

> Before the training began, I spoke to the participants who were already in the room. One guy spoke about living and working as a service advisor in different countries. Essentially, he spoke about how the context of the dealerships he worked at are different but the process is the same.

Other times it would seem that participants simply connected ideas that I was sharing with them with ideas they were introduced to before. For instance, in my journal I noted that at the end of the training, which introduced participants to the general systems thinking, one manager said that he and other managers are “able to see the dealership structure as a system, see how one part affects everyone else, and see the needs of the whole dealership.” In another journal note, I wrote about participants’ feedback which took place after I spoke to the participants about relational energy transfer. “One participant shared that he thought about relationships in terms of energy for a long time.”

At the same time, I could notice that participants were learning new information and made discoveries for themselves. For example, during the week I would introduce participants to the concept of over-functioning and under-functioning, “One manager made discoveries during the training and told me to, ‘Tell the associates that [manager’s name] over-performs.’ He than added, ‘I think my problem is that I am trying to change others.’” Similarly, when I would ask participants for feedback at the end of the training, “One participant said, ‘I liked ‘responsibility to self’’ and another said, ‘I liked ‘one degree’’” This speaks to participants’ ability to gain knowledge while enjoying the process of learning. Likewise, “[participant] added that he would like to see more examples about six emotional responses to stress: lie, blame, hide, run…” These feedbacks let me know that participants are grasping new knowledge, thoughtful about their learning experience, and engaged in the learning process.

Skills. Some participants begin to report changes in their skills and behavior as early as week two. For example, “One [participant] said that he noticed to be less mad, even though the computers are not always available.” Deeper into the training, more participants begin to share positive feedback about the program and note changes in their own skills and behaviors in relationships to customers. For instance,

> [A participant ESL] shared that she was focusing on learning the system and paid the most attention to the computer program and paperwork. ESL realized that she is not looking people in their eye, which leads to not memorizing their faces. . . . This created uncomfortable situations for her and made customers unhappy. She is starting to pay more attention to people's faces, be present in the moment, and pay more attention to the customers as people. She began to prioritize customers over the paperwork system, without minimalizing importance of the paperwork.

Some participants spoke about my training as a refresher. In other words, they already possessed skills that I was sharing with them but they forgot about them. Now, after the training took place, they begin to use those "basic," yet crucial relational skills.

Attitude. At one of the trainings, we spoke about different learning styles and different emotional expressions to show interest or disregard to something. In that training I utilized an activity which helped me evaluate participants' learning style. During that exercise,

> Two participants completed the exercise very quickly, like they did it before. One participant gave up. Another participant was very curious about how to do it. He kept trying to figure it out. Even when I gave the correct answer to the exercise, he wanted to understand the pattern behind it. Another participant was sitting without moving or drawing. It is like he was not even participating.

Despite such a diversity of responses to the training's exercise, every participant showed interest to it. So, in the same way, I cannot note one type of attitude and then try to evaluate every participant based on that type of attitude. Every participant is different and their emotional expressions are also different.

During the first training week I recorded in my journal the participants' original attitude to the training. I noted that management wanted to know about the organizational structure of the training, which would help facilitation of the training. I wrote, "Manager also wanted to know what will we do the rest of the week from the organizational perspective, as he was the one in charge to help me set the training up." Another manager, probably like other participants with more experience, commented, "We are talking the same thing. Your info may be new for the new people but for people who are working here for a while, it will be a refresher." Some participants were curious about me as a person and about my connections to the management. "He was also curious about how I end up being the trainer. He wanted to know about my relationships with [owners of the dealership]." In a similar note, another participant "asked who is my boss." Others were curious about the content of the training. "One [participant] commented, 'So, what else are we going to do?' and was curious about the content of the training."

As the dealership, where the training took place, already provides a large amount of training to their associates, some participants were not eager to participate in *another* training.

> One participant said he had to leave the training due to their customer coming at the same time. I had an email to that participant offering to come another day, noting that it is fine if he does not, but he did not came.

Other associates seemed to get comfortable and engaged with the training from the start.

> Associates laughed and it felt like a very relaxed atmosphere. I asked [an associate], with the most experience, to share his knowledge and give feedback about the training in connection to his practice of working at the dealership. He was so eager to talk that I had to remind him that our time is limited.

Likewise, in another journal entry, I noted, “They seemed to like my examples. It stimulates them to give their own examples. One participant said, ‘It makes sense’ and shared an example about how he and his wife currently negotiate important decisions for their family.” Overall, I think participants’ attitude toward the training was positive and expressed receptivity of the training’s content.

Confidence and Commitment. As the participants began to feel more comfortable with the training’s structure, they were more willing to be vulnerable in the training room. This was expressed when participants began to share their personal and professional concerns. For example, during week three of the training program,

> The guys were talking about stress. One said, “I want to do best for my customer but I am worried about the CSI score. Sometimes, no matter how hard we try, we still do not get an excellent CSI score and it makes us look bad and affects our paychecks. . . . This makes me stress.”

Participants’ ability to be vulnerable and open about their concerns showed their confidence in the training program, whether in me as a trainer or in collaborative group discussions, and commitment to the training, as it reflects participants’ involvement in the learning process.

Participants' examples of how the training material is applicable to their professional experience also demonstrates and supports their confidence and commitment to the training, as it would help other participants to make similar connections. For instance, "When I introduced "You sell the way you are," [participant] ESE shared how he would give 15% off to almost all his customers but he would sell in bulk. This is the way he buys too." In support of that participant's statement, "[participant] ESA responded that this is how ESE convinced him to buy three pairs of shoes." Those situations help strengthen participants' confidence and commitment to the training because the participants know and trust each other better than they knew and trusted me. Therefore, when their colleague supported ideas that I would share in the training program, it would help them to gain confidence and commitment to the training.

Participants' confidence that the training was useful would grow even stronger when I asked associates to practice some of the exercises on their own with customers or family members and they came back sharing positive experiences. One shared that when he applied relational ideas "with his customers," he reported that as a result, "the sales process goes faster and customers feel heard." Another participant shared that when he "talked to his wife," he reported that as a result "she was very happy."

Semi-Structured Interview

The participants' learning was evaluated formally during the semi-structured interviews. In this stage, I aimed to identify the degree to which the participants gained the intended knowledge, skills, attitude, confidence, and commitment from their participation in the CDS training program.

Overarching Themes. The overarching theme that was found among all participants is that all of them gained intended *knowledge*. Specifically, participants shifted focus from procedural steps of the sales and service process to building relationships with customers and being attentive to the customers' relational needs. For example, participant ES1.4E said,

> I never been on that side [meaning being a customer who comes to the service drive]. So, it is kind of… you know… it is kind of… like to actually put myself in the customer's shoes and actually trying to understand what they are going through, it is actually surreal. Because I been in this business for a couple years now and never did I experience that till now, so I think that is pretty cool. So, I am kind of like stuck on that.

Participant TS1.1R shared,

> Now I pay more attention to things that I would just let pass by. Like when I talk to people… sometimes now I would just entertain people now… Like, "Ah yeah! Are you serious? Really!? Sure! Oh my God!" I do things like that to build up with the people more. So, I have changed, for sure since the class. . . . Whereas before, even though I knew that before, it was just like, "Okay, your car messed up. Cool." Get that information in the system [plays with fingers on the table, like the participant was typing on the keyboard], "Don't worry I will figure it out. We get… We will figure out what was going on with the car" was the first approach but now I, repeating it all back to them and they are feeling a little bit more open now. Because, *I am not just the guy that is taking the information*. I am here, "Oh

> my God, your car is messed up. Are you serious? You have kids! Oh no!" Stuff like that. So… and they relax a little bit more.

Participant TS1.3J articulated,

> I guess since I was just starting out not that long ago, I was more focused on the process of doing it all, rather than worrying about paying attention to the customers' needs. It was just, let me make sure I do this right, let me make sure I do this right, do this right, and it was almost going of the check list, rather than… you know… don't worry so much about the check list, worry about the person in front of you.

Participant TS1.2M expressed,

> What I learned is… from *you*, is that if [customers] are coming with the problem, it is not you. Is not… Is not… that… that you… that they are mad at. You have to find out exactly what's going on and have a good ear and listen.

Similarly, participant ES1.5A said, "The one about the… the 'selling how you buy' really got to me. That was like legit, ahm . . . Yeah. That it is true. You gave us an example and it is true. I sell like that."

Participants also expressed a shift in their *attitude* toward their relationships with customers. For instance, participant TS1.3J answered,

> You kind of have to adopt to [a customer's] personality in order for them to feel comfortable, rather than just you gonna treat all of them exactly the same. Like, a number and go through the script. Script does not really work in a person to person customer service industry, as it does over the phone.

Participant ES1.4E added,

> Ahm… Another thing that I found really useful was when, ah… Like that, that ah… That diagram that you had of where you invest your energy and how it comes back, that was pretty… Like I… We never really analyzed things that way until you mentioned it. So, I thought that was pretty cool.

Participant TS1.1R shared,

> Yeap, cause now I pay more attention to things that I would just let pass by. Like when I talk to people… sometimes now I would just entertain people now… Like, "Ah yeah! Are you serious? Really!? Sure! Oh my God!" I do things like that to build up with the people more. So, I have changed, for sure sensed the class.

Participant ES1.5A expressed,

> I feel that with the training I actually paid attention more a little bit to what they are coming in for, and putting myself in their shoes. Not just they need this, so I will sell them this, for me to make money. Yes, I am still, like, trying to make the money, but in a way I can make a money while actually like helping them as much as possible.

And participant TS1.2M noted their own perspective on the concept of relational triangles,

> What I said is, "One is a buyer and one is a decision maker." . . . But then you say, "Make sure and get both of them involved." And that is the only thing that, the negative that I saw. . . . But you were right, you was right, only you… so it can go both ways.

Participants also obtained new *skills* and gained *confidence*. For instance, participant TS1.3J articulated,

> I guess it is more reading the customer's, ah… reading the customer's mood and stuff like that. Like, based of like, ah… if they have short answers and stuff like that and kind of just getting the whole body language feel off of them and everything, and knowing like how each customer kind of needs to be handled differently.

Participant ES1.4E added,

> There are always different ways to, ah… solve, ah… problems, whether it is within work, or relationships, or what not. Just don't stay so focused. Try to, ah, like, kinds of, ah… like… expand your mind, I guess and just… to not overthink things and to not focus onto something so strongly 'cause you get to, you kind of miss a lot of things on the outside.

Similarly, participant ES1.5A stated,

> You know like that, that "triangle" and everything is in the triangle, you know, it always comes that this affects [slaps on the table], then it comes back to this [slaps on the table], you know, and . . . the reason that a lot of customers get mad at you for something and then you bringing a third person, just because that other person comes in, you know, it, it, it neutralizes the, ah… intensity. It is true. It is true. Maybe when we bring in the manager it is because it is the manager, but maybe not, maybe it is because that third person, you know, wants to hear another opinion and, if it the same as *mine*, they like, okay, they both let me the same

> thing, it's because, okay… like calm down, so. Everything seemed pretty understandable.

The participant TS1.1R answered, "Two things that I got was… One, listening to people more, and two, not being afraid of bringing on the third person into the equation to help with the problem." In this statement, the participant refers to two group-trainings. First, he refers to the rapport building skills through listening and separation of customers' emotional needs from the emotional needs of the service advisor. This exercise was utilized during the discussion of the differentiation of self. Second refers to the concept of Relational Triangles, specifically the discussion about the usefulness of utilizing relational triangles to build sustainable business relationships. And participant TS1.2M expressed,

> Once I started the class, you know, I do know that I been doing it for a while, but I've learned that a lot of the customers that comes in, they coming, they have a problem, they have ah, something that is going on with them. And I've learned to listen to them and find out what the problem is and then, ah, and then found a solution for it. But that's what I got out of, ah, attending the class.

Shared Theme. A shared theme that stood out to me is a *refresher course*. In other words, some participants pointed out that the information they received during the training served as a reminder of similar information they learned before, which made training more credible for them and to gain *committment* to practice skills on the job. For example, participant TS1.2M made a comment, "Since I knew [listening skill], it just reminded me of what I have to do. You know what I mean? It gave me a refresher." Similarly, the participant TS1.1R shared,

> So, a while ago, ahm… where I used to work before [place of employment], one of the things that they enforced was, ahm… when you selling stuff is to… ahm… it is pretty much what you went over. . . . So, if I heard it before and you reiterating it, you, me, it must be the right thing to do.

Unique Theme. A comment made by the participant TS1.1R, made me think of a unique theme I called *not applicable exercise*. The participant shared,

> Not really confusing, but when we didn't communicate but got the other person to do what we wanted them to do was a little bit… different. Ahm… It wasn't that it was like, irrelevant… but it was just different and I wouldn't… I would not be able to guide somebody through my process without verbally communicating with them.

In this response, the participant refers to the "non-verbal" communication exercise, which was focused on helping participants to enhance rapport-building skills through listening and separation of customers' emotional needs from the emotional needs of the service advisor. This exercise was utilized during the discussion of the differentiation of self.

Summary Level 2: Learning

Participants' learning was evaluated based on two measures, notes from the trainer/researcher's journal and answers from the semi-structured interview. Notes from the trainer/researcher's journal indicate participants were able to gain new relational based knowledge that helped them with (1) thinking in a different way about human relationships, and (2) realizing their own role in relationships and behavior in particular. Participants' answers from the semi-structured interviews indicate that participants gained the intended *knowledge*, *skills*, *attitude*, *confidence*, and *commitment* from their participation in the CDS training program to apply newly gained knowledge on the job. This had influenced the participants' desire to behave differently (Level 3).

Level 1: Reaction

Level 1 measures participants' reactions toward the training in terms of whether the participants found the training favorable, engaging, and relevant to their professional needs (D. Kirkpatrick, 1959a, 1998; D. Kirkpatrick & J. Kirkpatrick, 2006; J. Kirkpatrick & W. Kirkpatrick, 2016). Evaluation of participants' reactions was accomplished formally and informally (Table 9). Informal evaluation was accomplished through my, the researcher's, personal observations and recorded in my journal. Formal evaluation of participants' learning was done through utilization of (1) two types of surveys, the "Participants' Reaction to the Training Survey" (Appendix K) and the "Calm-Driven Training Reaction Sheet" (Appendix L), and (2) semi-structured interviews (Appendix I).

Researcher's Journal

During the informal evaluation, I focused on evaluating participants' verbal and non-verbal behaviors, such as engagement and enthusiasm of participation in the training and coaching sessions, as well as application of the material on-the-job. For the evaluation of Level 1: Reaction, I noted whether the participant found the training favorable, relevant, engaging, and comprehendible.

Favorable. During week one of the training program, I noted in my journal the participants' reaction in terms of whether they found the training favorable,

> One participant commented about me, as a trainer, "I like your style. You are relaxed, laidback, and funny. You do not put pressure on us. You sit down and joke." Other participants showed agreement.

Reflecting on another group from that week, I noted,

> They seemed to really like the "one night stand, living together, and married" metaphor. They seemed to be able to relate to those examples and began to share their experiences after I gave those examples. They seemed able to relate better.

During week two, after one training day, I noted, "I think [the training] went much better." Another day, I noted, "Your training is different. I went to many trainings and at times they seemed repetitive. I knew what it would be about from the first few minutes. Your questions and your style is… different." I received similar feedback on the other day of the training, "I think today went very well. People are saying that they like my educational style (at least no one was brave to tell me that it does not work for them)."

Likewise, during week three I wrote, "Before the training, I went to the service drive and said, "Hi" to the associates. They seemed happy to see me. Expressing that they are glad that trainings are starting up again." Additionally,

> As soon as I came to the dealership, I saw [the general manager] who said that he received positive feedback about the training. He said that originally he was concerned about "an orthodox concept of the training" but he said he receives positive feedback.

In my journal notes, I recorded that the general manager continued to give positive feedback about the training during week four and once again after the training ended,

> Before I left I spoke with [the general manager]. He said that he is receiving positive feedback from all the managers about the training. I told him that I love working with his guys. He said that it is visible. He also said that if it had not

> worked out, he would have stopped the training a long time ago. He said, “Time is more important than money. I would not let you waste our time.”

During week five of the journal notes, I mentioned, “Based on how talkative and open the guys were, I think the training went very well.” Additionally,

> [The participant] TSW came first and spoke about him wanting to come first. He also expressed that he learns a lot from the training, “It is very intense. You add a lot of knowledge to what we already know.”

Those reflections from the journal notes confirm that participants found the training favorable.

Relevant. I noted participants’ reaction in terms of whether they found the training relevant to their work environment. During week one of the training program, I wrote,

> One participant, who worked for the company for many years, seemed like he wanted to leave for the first 30 minutes. He expressed that he does not like the food, he kept checking his phone, and kept moving in his seat. Then, at the end of the training, he said, “Amen [to that!]” and became very engaged.

In other words, this participant found the training relevant, even though from the start he was thinking otherwise. Additionally, during week one, “At the end, [managers] did not leave the training room, and I left first.” During week three I noted,

> Both [managers] seemed very happy about the training. [Manager M] liked everything and when I asked to point out something he liked the most, he said, “Everything.” When I asked if he thought something was irrelevant he said,

> "Nothing." He added that he liked the examples and found them the most useful.
>
> [Managers] did not want to leave the training room.

I spoke with one training participant at the service drive, rather than in a training room, and then made notes about our conversations in my journal,

> [Participant] STA saw me and told me that yesterday he lost $100 in a referral bonus and $4,500 in a possible work order due to coming to training for an hour. Yet, he said that he likes my training. He said he does not think it will help him to make more money but it will help him to understand relationships better.

Week four I wrote,

> At the end of the training, one lady said, "I used to not even take time for lunch [to save time and make money] but now I enjoy coming here". When I asked her what made it so, she said, "I like to learn about my colleagues." She said that she would only talk to customers but this training helps team building.

During week six, I noted participants' feedback after I shared with them the concepts of Relational Triangles, "[The participant] ESE shared a story of a customer who bought tires because the other customer in front of them told them to buy them," which confirmed the concepts I was telling them about. These notes let me know that participants found the training relevant to their professional environment.

Engaging. During week one of the training, I noted, "[Managers were] very good listeners. They would lean forward, look into provided folders, and gave examples when *asked*." I added,

> They did not seem to be stressed or happy about the training. They looked like they are trying to digest the information I'm giving them. They give me positive

> feedback on a paper. I could not figure them out. It was like they kept thinking and processing the info, while trying to make sense and form an opinion about their experience working with me.

I recorded the following about participants' engagement during the first week of the training, "Associates were willing to participate and give feedback. They seemed to pay attention." There were suspicious ones, "One participant left at the beginning, saying that he got a call from a customer and came back when the training was over. Another participant came late."

During week two,

> I still did not feel like it went well. Participants would verbally agree but they did not seem excited about it. It is like there is no benefit for them in participating. Yet, they did not want to leave the training either. I told them we are done 3 times and they wanted to continue talking.

I also reflected, "When I asked them questions I could tell it makes them think because they would look into different parts of the room and had fussiness in their eye when they would look at me."

My reflections about participants' engagement begin to shift during week three. During this week I wrote that participants remained in their active focus during the training despite distractions,

> I think it went very well. Guys were sharing examples, making jokes, laughing. When food came and there were no forks, they said, "Katia, don't worry about it," and maintained their focus on the training. They did not eat. They held their food until the end of training.

Additionally, “There were a lot of phone calls during the training but we were able to go on.” I spoke about confusions and challenges that came up one day during week three,

> I felt strange during the whole training. I felt like the guys are not interested in what I have to say because they were “dry.” It was like I was talking to the wall. I do not know if it was because they were hungry. Or maybe because they did not get paid yet and were stressed about that. Maybe it was because I implemented “Do not be late and I will tell you a secret” rule … I do not know.

And,

> I do not feel comfortable. I want to make the training perfect and it does not seem to work. This bothers me to the point that I do not want to do my journal today. I was also almost late to the training myself, for the second day in a row! This put me in stress, even though I was not actually late.

During this week, I also wrote that the participants became more relaxed and active during the training, “This group likes to talk and seems to be exited about being there. We spent the most time on the ‘bonus’ info. Every participant shared their own stories.” Additionally, “We did two exercises and that took the rest of the time. [Participants] keep wanting to share stories and personal experiences. The conversation kept going.”

Participants’ engagement continued to shift during week four. “I had all three managers participating. They seemed to be eager to come to the training today.” Similar excitement was noted during another day of the training week. “He did not want to leave. He said, ‘I got to go’ about seven times, yet he was still sitting there.” Similarly, in my journal notes, while reflecting on individual training, I wrote,

> At first, he was very closed off. Trying to figure out what is this individual training is all about and then somewhere after fifteen minutes, he just opened up. His body posture changed and he began to talk with his own volition.

Likewise, reflecting on another participant,

> At the beginning of [the individual] training, he shared that he does not know what [the training] is all about. I empathized with him and kept on going. We stayed fifteen minutes after the session hour was over. I gave him multiple opportunities to leave. Eventually, I had to get up and we left together. I guess he liked something about [the individual training].

These journal notes let me know that the participants remained engaged throughout the training.

Participants' engagement was also evident in their communications with me outside of the training time. For instance, before the group meetings and individual coaching, I would send participants reminders about upcoming trainings, to which some participants responded, "Thanks for the reminder, I was worried I missed it. I'll put it in my calendar now"; "Ok cool!!!"; and "Great! Thanks Katia, I appreciate it." When I read those messages, it let me know that participants were looking forward to our meetings.

Comprehendible. Journal notes that reflect whether participants found the training comprehendible include, "A manager told me, 'You are preaching to the choir'." Some participants said that, '[Manager's name] told that to us before.'" "One participant spoke about his previous trainings, 'We was told something similar in my previous job'."

In order to help me evaluate whether participants found the training comprehendible, I asked, "What concepts, if any, from the training program did you find most confusing or irrelevant to your work environment?" I then noted participants' responses in my journal. "One participant answered, 'Nothing. It all makes sense and similar to our ideas, it is just presented from a different angle.'" In another entry, I recorded,

> People respond positively to the training. One participant shared that he thought about relationships in terms of energy for a long time. He told people with whom there was no energy match that he cannot work with them. He was looking after his CSI score. [Another participant] said that she studies psychology on her own terms. She said, "We work with people in service and sales, we need more information about psychology. Why don't we have more training about that?"

This let me know that participants found training engaging and comprehendible. "When I asked what was the most interesting to them, [one participant] said 'energy and relational patterns,' [another] 'psychology and relationships'."

I continued getting the impression that the training is comprehendible. During week three, one participant shared "that my examples are the most useful for him. He liked stories and real life application of ideas. When I asked what is the least useful, he said, 'I want to go back to make money'." Additionally, I noted,

> I think exercises went well. Guys liked discussions and asked to do more of it. I knew that they understand the concepts because when I asked what they liked in the training, they pointed to actions that they did during the exercise, like "I noticed that it gets better with experience."

Reflecting on individual coaching experience, I noted, "Every interview, participants expressed that they enjoyed my trainings and that they found the information useful." "At the end, I asked if he would like to meet again next month and he answered 'Yes' very enthusiastically." Also, "I think he made a lot of connections for himself because he kept saying, 'Ahw,' 'Wow,' 'Interesting,' and 'Hah!' I could tell that his wheels are turning." Those reflections let me know that the participants found the training comprehendible.

Participants' Reaction to the Training Survey

The "Participants' Reaction to the Training Survey" (Appendix K) was utilized as a method of formal evaluation. This survey was focused on evaluating participants' reactions to the training on day-to-day operations. The immediate feedback from the "Participants' Reaction to the Training Survey" allowed me to identify potential errors and make necessary changes to the training by adjusting the teaching approach and program content, as well as improve satisfaction, because participants witnessed the immediate response to their concerns and minimized discomforts. The survey asked eight scaling questions. In those questions the participants were asked to rate their response on a scale from 1 to 4, where 1 is "Strongly Disagree," 2 is "Disagree," 3 is "Agree," and 4 is "Strongly Agree."

During week one of the training program, the participants gave an average of 4-point rating to "The content was easy for me to follow"; an average of 3.9-point rating to "What I learned will help me do my job better"; an average of 3.9-point rating to "I took responsibility for being involved in the training program"; an average of 3.9-point rating to "I would recommend this program to others"; an average of 3.9-point rating to "This training has assisted me in improving my ability to manage relational intensity in a calmer and more organized manner in the automotive service environment"; an average of 3.9-point rating to "This training has assisted me in improving my ability to better understand the relational patterns"; an average of 3.9-point rating to "This training has assisted me in improving my ability to establish and maintain emotionally healthier professional relationships"; and an average of 3.9-point rating to "The trainer presented material in a clear and effective way."

The participants gave an average of 4-point rating to every question on the survey for weeks two, three, and four of the training program. They also gave an average of 4-point rating to every question on the survey for week five of the training program, except they gave an average of 3.9-point rating to "What I learned will help me do my job better" question (Table 9). Therefore, the participants gave a combined rating among the first five weeks of the training of an average of 4-point rating (100%) to "The content was easy for me to follow"; an average of 3.96-point rating (99%) to "What I learned will help me do my job better"; an average of 3.98-point rating (99.5%) to "I took responsibility for being involved in the training program"; an average of 3.98-point rating (99.5%) to "I would recommend this program to others"; an average of 3.98-point rating (99.5%) to "This training has assisted me in improving my ability to manage relational intensity in a calmer and more organized manner in the automotive service environment"; an average of 3.98-point rating (99.5%) to "This training has assisted me in improving my ability to better understand the relational patterns"; an average 3.98-point rating (99.5%) to "This training has assisted me in improving my ability to establish and maintain emotionally healthier professional relationships"; and an average of 3.98-point rating (99.5%) to "The trainer presented material in a clear and effective way."

Based on the results from the "Participants' Reaction to the Training Survey," it can be assumed that the participants found the training favorable, engaging, and relevant to their professional needs. In other words, they were satisfied with the first five weeks of the training program.

Table 11. *Weeks 1-5 Reaction to the Training*

	Survey Score					
	Week 1 Average (Aver.)	**Week 2 Aver.**	**Week 3 Aver.**	**Week 4 Aver.**	**Week 5 Aver.**	**Weeks 1-5 Aver.**
The content was easy for me to follow	4.0	4.0	4.0	4.0	4.0	**4.0 (100%)**
What I learned will help me do my job better	3.9	4.0	4.0	4.0	3.9	**3.96 (99%)**
I took responsibility for being involved in the training program	3.9	4.0	4.0	4.0	4.0	**3.98 (99.5%)**
I would recommend this program to others	3.9	4.0	4.0	4.0	4.0	**3.98 (99.5%)**
This training has assisted me in improving my ability to manage relational intensity in a calmer and more organized manner in the automotive service environment	3.9	4.0	4.0	4.0	4.0	**3.98 (99.5%)**
This training has assisted me in improving my ability to better understand the relational patterns	3.9	4.0	4.0	4.0	4.0	**3.98 (99.5%)**
This training has assisted me in improving my ability to establish and maintain emotionally healthier professional relationships	3.9	4.0	4.0	4.0	4.0	**3.98 (99.5%)**
The trainer presented material in a clear and effective way	3.9	4.0	4.0	4.0	4.0	**3.98 (99.5%)**

Calm-Driven Training Reaction Sheet

During the sixth week of training, the participants were asked to complete a "Calm-Driven Training Reaction Sheet" (Appendix L) to provide their overall reaction to the training. It is imperative for me to show you the participants' response based on the date of the training. This is because the training program is continuously improving based on every week and every day. So when any concerns about the program effectiveness would surface I, as a trainer, would think on my feet about way to improve the training. With that said, the participants were asked to respond to the first thirteen questions of the "Calm-Driven Training Reaction Sheet" on a scale from 1 to 5, where 1 meant "Strongly Disagree," 3 meant "Agree," and 5 meant "Strongly Agree."

The participants from Monday's class gave a 5-point average for every question (Table 14). Tuesday's class gave a 4.9-point average, with a 4.2-point average for "The material was relevant to my job"; 5-point average for "The material was presented in an interesting way"; 4.8-point average for "The material helped me to think differently about relationships"; 5-point average for "The material helped me to behave differently with others"; 5-point average for "The instructor is an effective communicator"; 5-point average for "The instructor was prepared"; 5-point average for "The handouts were helpful to me"; 5-point average for "The visuals were helpful to me"; 5-point average for "The group exercises were helpful to me"; 5-point average for "The videos were helpful to me"; 5-point average for "There was a good balance between presentation and group involvement"; 4.8-point average for "I feel like the training will help me to do my job better"; and 4.8-point average for "The schedule was suitable" (Table 14).

Immediate feedback allowed me to identify errors and make necessary changes by adjusting the teaching approach and program content. Adjustments were implemented to the Wednesday's group-training based on responses from the Tuesday group participants to the questions that did not receive a 5-point average. Those questions included: "The material was relevant to my job," "The material helped me to think differently about relationships," "I feel like the training will help me to do my job better," and "The schedule was suitable." The participants from the Wednesday class gave a 5-point average for every question (Table 14), which represents that adjustment was received in a positive way. The same was accomplished on Thursday, when the group-training participants provided a 5-point average for every question (Table 14).

All training participants gave a 4.97-point average (99.4% in agreement) on the training evaluation form. Participants gave a 4.8-point average (96% in agreement) for "The material was relevant to my job"; 5-point average (100% in agreement) for "The material was presented in an interesting way"; 4.95-point average (99% in agreement) for "The material helped me to think differently about relationships"; 5-point average (100% in agreement) for "The material helped me to behave differently with others"; 5-point average (100% in agreement) for "The instructor is an effective communicator"; 5-point average (100% in agreement) for "The instructor was prepared"; 5-point average (100% in agreement) for "The handouts were helpful to me"; 5-point average (100% in agreement) for "The visuals were helpful to me"; 5-point average (100% in agreement) for "The group exercises were helpful to me"; 5-point average (100% in agreement) for "The videos were helpful to me"; 5-point average (100% in agreement) for "There was a good balance between presentation and group involvement"; 4.95-point average (99% in agreement) for “I feel like the training will help me to do my job better”; and 4.95-point average (99% in agreement) for “The schedule was suitable” (Table 14). Therefore, based on the “Calm-Driven Training Reaction Sheet” for the training program overall, the participants’ reaction to the training is considered satisfactory.

Table 12. *Reaction to the Training Overall*

	Mon	Tues	Wed	Thur	Average score	Agreement score in %
The material was relevant to my job	5	4.2	5	5	4.8	96%
The material was presented in an interesting way	5	5	5	5	5	100%
The material helped me to think differently about relationships	5	4.8	5	5	4.95	99%
The material helped me to behave differently with others	5	5	5	5	5	100%
The instructor is an effective communicator	5	5	5	5	5	100%
The instructor was prepared	5	5	5	5	5	100%
The handouts were helpful to me	5	5	5	5	5	100%
The visuals were helpful to me	5	5	5	5	5	100%
The group exercises were helpful to me	5	5	5	5	5	100%
The videos were helpful to me	5	5	5	5	5	100%
There was a good balance between presentation and group involvement	5	5	5	5	5	100%
I feel like the training will help me to do my job better	5	4.8	5	5	4.95	99%
The schedule was suitable	5	4.8	5	5	4.95	99%
Overall	**5**	**4.9**	**5**	**5**	**4.97**	**99.4%**

Additionally, the "Calm-Driven Training Reaction Sheet" included two open-ended questions that were aimed at evaluating Level 1: Reaction (Appendix L). The first question was, "What topic was the most beneficial, if at all?" Some participants (n=4) did not provide a response to this question. Others responded the following: "Anxiety. Triangles," "The stress management & Anxiety," "Relationships building," "Gaining energy and maintaining energy," "Customer relationships," "Everything was excellent," "I really enjoyed the class, learning how to listen to people," "Different anxieties of sales," "Overcoming objections," "How to handle different customers (change, control…)," "Anxiety," "Anxiety and what we do under stress," "Redirecting energy," and "Directing energy and triangles."

The second question was, "What would have improved the program?" Some participants (n=6) did not provide a response to this question. Other participants responded: "Nothing! Perfect program," "Everything was great," "How to manage anxiety," "Coffee," "More days a week," "The way we see ourselves as sales person and human side," "More hands-on role plays," "More time per session," "Nothing, everything perfect," "Nothing," "N/A," and "How to solve more issues in triangles." Responses to those two questions represent participants' overall satisfaction with the training program.

First Set of Semi-Structured Interviews

The participants' reaction to the six weeks group-training was evaluated formally during the first set of semi-structured interviews. In this stage, I aimed to identify the degree to which the participants found the CDS training program favorable, engaging, and relevant to their professional needs.

Overarching Theme. The overarching theme that was found among all participants is that all of them gained some type of information that they found to be useful and helpful to their work environment. In other words, they found the training *favorable* and *relevant to their professional needs*. For example, participant ES1.4E shared, “Everything was, was, was relevant. Everything was connected to… to what we do.” The participant added,

> I mean it is a huge difference between, between the trainings that, that the trainings that I been through, that are for hours… and they are just over the same topic, like constantly, versus a solid hour, hour and a half of getting to the point [claps hands].

The participant TS1.3J supported those statements,

> I mean, the organization was really, really good. I mean… thing that I thought was the best was the actual person-to-person like doing them like, treating the people, the customer, cause I feel like, and even, you know, it make you more comfortable.

The participant TS1.1R shared,

> [The CDS training] made it a lot easier for me to build rapport with the people that come in front of me. It helped me a little more to understand where they are coming from and how to approach them a little better.

And the participant TS1.2M expressed, “Well… I think you did quite well. I don’t see anything… I don’t think nothing you should change or add. Just keep pumping.” Participant added, “So, I do not see any kind of negative or any you should change to even better us or change you way. You know. Because I enjoyed the class, I enjoyed coming here, and listening, because I learned."

Participant ES1.A5 articulated,

> Not to say, not… to feel like, you know, I am telling you nice things and stuff, but… I used to worked at the bank and we had trainings and they were *boring* and to be honest, the training… with you, it was actually entertaining. . . Like, and you can see with everybody would say the same thing, like, it was actually pretty good. Nothing was bad and everything was pretty decent.

Shared Themes. Two identified shared themes that were expressed by few participants include (1) the participants found the training to be *engaging* and *comprehendible*, and (2) the participants noted change *in educational experience through time*. The participant TS1.3J found the training to be *engaging* and *comprehendible*,

> It was all explained pretty well. I mean, with all kind of, ah, the actual person-to-person, like the drills and stuff that we did and things like that, and with actual, the visual aids for some of them with the videos and stuff like that.

The participant ES1.4E shared,

> Well not just the exercise, but that, ahm, that day, that… that… that hour that we were here with you was pretty good. Amh… Because you started the training with that exercise and from there on you carried on, the point that you were trying to make with the exercise, you were carrying on through the entire training so it was very good.

The participant ES1.5A added, "I don't really, don't remember… nothing that was *not* easy to understand. Like you explained everything pretty good. I mean, everything that you really showed, it makes sense." Additionally, when the participant TS1.2M was asked, "What information, if any, from the training program did you find most useful to your work environment?" the participant responded,

> All of it. Ha… That's all of it. Because they by… I am telling you. Listen, I would tell you the truth. All of it. Just all of it… And that's my questions. And I will stick with it! [participant and researcher laughing]

Few participants described *shifts in educational experience through time*. The participant TS1.3J expressed,

> In the first few, everyone was just kind of quiet and no one wanted to answer besides maybe one or two people, and then everybody becomes more comfortable as everything goes on with just building… I guess the relationships with, ah, everyone in the group and… you really, you start to absorb everything a lot better.

And the participant ES1.4E shared, "*For me*, at first I was not really interested in coming into the training."

Unique Themes. Some unique themes that were expressed by participants include *scheduling*. The participant TS1.1R shared,

> I think what made class difficult is that our job does not have an actual schedule . . . We have so many things lingering, and pending, and coming, and going, that for us to get a solid focused hour out of the day is hard.

The participant TS1.1R also shared another unique theme, which is destructions via constant *phone interruptions*,

> Because my phone is ringing, I am getting text messages, I am trying to learn something, but at the same time I am still trying to keep my customers, ah…

> satisfied . . . I cannot give you a 100 percent of my attention because when my phone rings . . . I excuse myself out of the conversation and now I am talking to this guy about who knows what, then I get off with him and now I have to try to squeeze back in without interrupting everybody else. So the phones, it is like, ah… I am not a big fan…

The third unique theme expressed by the participant TS1.1R is a *desire to have deeper training experience through adding training days*.

> I would like it if we would have [the training] more than just once a week… and if there would be an actual block out where I could come in here and I could sit down and I do not have to worry about my phone or anything like that. So I can absorb everything that you are telling me. . . . If there was anything, I would say I would like at least a second day during the week and at a decent time.

The fourth unique theme that came up during the interviews is *a collaborative learning experience*,

> I feel it was all like a collective, like all, everything that you were teaching was… just… everyone was picking up, but since when, you know… everyone has its own take on it, everyone has their own interpretation of it, and when everyone is more vocal and they share that, it gives you a lot of different perspective, perspective to, ah… to learn from.

Second Set of Semi-Structured Interviews

The participants' reaction to the individual coaching session was evaluated formally during the second set of semi-structured interviews by asking the participants to, "Please describe your experience of participating in the individual training with me a few weeks ago." Like with group trainings, participants expressed that they found the CDS training program favorable, engaging, and relevant to their professional needs. Participant ES2.5A described the training as favorable and engaging, "It was good. I felt like I… I felt comfortable opening up, telling you, talking about whatever we were talking about. . . . I felt good, I did not feel pressure or anything." In the same way, participant TS2.1R said, "It was cool. It was good." Specifically,

> Ahhm… Well one, you are easy to talk to and, ah, we were talking about, like, a family stuff and, ah… things that we are… like, how I feel and how I get handle, like, work and stuff like that, which was cool, pretty easy going conversations. It was nothing uncomfortable that I went through.

Participant ES2.4E found the CDS training program to be favorable, engaging, and relevant to personal professional needs. The participant shared,

> [The individual coaching] was very to the point. Ahm,… it was very, ahm, information driven, very like, like, it got to the point. Like, when you are in the bigger setting [group-training] you kind of tend to bounce around that same topic for a while because everyone is pitching in, so you stay on a pretty, like, basic or quick topic for a while, for longer than you should, I guess. So, that's what I mean, [the individual coaching] was very to the point. Like, you ask me a question, I share my information, you share, and we move on. You know? . . . [The individual coaching] I guess is more *matching to my pace*.

This participant's response highlights two goals that I was trying to accomplish during individual coaching, which are (1) focus on participants' individual needs and (2) match the learning style of the participant.

Individual training helps explore participants' motivations and holdbacks on a personal level. During the individual training, participants made relational discoveries on their own terms, which helped them take responsibilities for their actions and make it more understandable to them. Participant TS2.3J articulated personal experience of individual coaching as,

> That was good. I felt like it was ah, it was, it made it really make a lot more sense. Sometimes you do not stop to think about why you do things a certain way, but it made more since when I, when you broke it really down, and kept asking the questions and I kept having the answers, it seemed like, okay, now it does make a lot of sense, why I do that.

In this experience I, as a trainer, also demonstrated to the participants how to relate to others, not only customers. The participant TS2.3J described it as,

> Mm, [the individual coaching] it was more, like, it was more trying to figure, like ah, get good hold of, like, what the individual was, like, like trying to figure out why, almost like the same way that we should be trying to learn about customers. I feel like that, what you were trying to do to me. Like, trying to figure out the reasoning behind why you are applying things the way you do and the way you treat people that you do.

Likewise, participant TS2.2M found training to be favorable, engaging, and relevant to personal professional needs. The participant said, "Aw… [clears throat] My experience training with you…Well, it was, ah…, it was a good experience." The participant explained,

> Well, what was good about is I get the opportunity to talk to you and talk about how we can over come things and make things better. . . . Because it does help me, it really does, it helps me and it makes me go back… to what I have, to what I have forgot, forgetting. You understand? It is like, you cannot ever, ahm, think that you know a lot or go without refreshing your memory.

Based on the participants' responses to both the first and second set of semi-structured interviews, it is evident that the participants had positive reactions to both group and individual trainings. Particularly, they found the CDS training program favorable, engaging, and relevant to their professional needs.

Summary Level 1: Reaction

Participants' reactions to the training were evaluated based on four measures: notes from the trainer/researcher's journal; "Participants' Reaction to the Training Survey"; "Calm-Driven Training Reaction Sheet"; and answers from the semi-structured interview. Notes from the trainer/researcher's journal indicate that participants found the training *favorable*, *relevant* to their work environment, *engaging*, and *comprehendible*. The "Participants' Reaction to the Training Survey" demonstrated that the participants were satisfied with the first five weeks of the training program. "Calm-Driven Training Reaction Sheet" showed positive overall reaction to the training in both scaling questions and open-ended questions. Additionally, participants' answers from the semi-structured interviews indicate that they found the training *favorable*, *relevant to their professional needs*, *engaging* and *comprehendible*, and capable of *creating change in educational experience through time*. Hence, the participants had a positive reaction to the training program, which influenced their desire to learn the material (Level 2).

Outcome

Based on the New World Kirkpatrick evaluation model, the CDS training program was able to achieve positive results in all four levels of evaluation. The participants had a positive reaction to the training program (Level 1). The participants were able to gain new relational based knowledge (Level 2) and participants' behavior changed (Level 3) in their ability to relate to their customers by (1) being able to think in defined ways, and (2) realizing their own role in relationships and behavior in particular. Additionally, the leading indicator, which describes improvement of the associates' relational skills, shows that the CDS training had a positive effect of moving the participating dealership toward accomplishing their overall goal of "becoming the number one volume dealer" (Level 4).

At the Finish Line

At the end of the training program, during the second semi-structured interview, I asked the participants, "Would you say that you have sufficient training to understand customer relations?" One participant, TS2.2M, said, "Yes." Participant ES2.4E responded, "Sufficient!? No! No way! I don't think that. . . . I think it is something that you always work on… and there is always room for improvement." Participant TS2.3J stated, "I mean, I don't think you can really ever say that. There is always more to learn." Participant TS2.1R added,

> Ahm, sufficient training!? No. I think I may have started to tip the iceberg and I am sure I can learn a lot more than what we learned in a couple weeks but I mean I have picked up things, but I think there is a whole lot more that I can learn that I can work on to make my job better.

Based on some of the participants' answers, there is room for the CDS training's growth and improvement. The limit to this growth can be only defined by individuals' personal needs and desires.

Ethical Implications During the Training Program

I did not encounter any significant ethical concerns during the training program. Yet, there were occasions during the training program that required my special attention. From the start of the training program, I informed the participants that derogatory comments toward any particular group or individual, which would happen not from the place of not knowing but from the place of ignorance, would not be tolerated. However, there were occasions where differences in views about diversity were expressed. One was related to the discussion of racial diversity. My journal note describes it best,

> [A white middle aged male] was uncomfortable during the assumptions exercise, which was evident in his continuous nervous laugh. The participant would state, "Race does not matter". [Another participant] tried to challenge him but quickly stopped voicing difference in his opinion. Unfortunately, I did not pick up on the conversation until it was too late and did not address it in the moment.

I was able to have a short conversation with the participant about race after the training. However, I think it would have been more beneficial if I encouraged the participants to expand on their discussion as a group and respectfully honor multiple perspectives. In the consequent steps, I had a consultation with the colleague who helped me find professional confidence in addressing racial conversations in the room. I also looked for the pattern of whether similar racial comments are found to be a norm at the dealership or more a situational event. I did not witness other situations of racial denial from other participants. Still, I witnessed common discomfort around the topic of diversity related to the sexual expression and identity.

In another event, there were multiple comments from different training participants that would share genuine confusion about members of an LGBTQ community. I provided participants with my own best answers and encouraged them to find a connection with people with different sexual identities and sexual expressions. I also had a private meeting with the General Manager of the dealership and suggested to him to look into available trainings in the community or to ask their own HR representative to host LGBT focused trainings, on which the General Manager of the dealership responded positively.

CHAPTER V: DISCUSSION

Conclusions and Recommendations

As a systems thinker who is influenced by Bowen family systems theory, I must reflect on my own emotional and educational development as a researcher, trainer, and therapist before I can express the effect of this research project on the marriage and family therapy field. My understanding of this research project, and what it offers to the marriage and family therapy field, is affected by my perception of what this research project accomplished and how the results could offer effective support to the marriage and family therapy field.

Conclusions to Self

- I was able to successfully navigate the demands of two contexts: (a) educational and theoretical ideas from the field of marriage and family therapy, and (b) practical business applications from the field of sales and customer service. I was then able to find common factors between those two environments and identify how they could benefit each other.
- I was able to demonstrate benefits of relational systems thinking to the business environment.
- I was able to demonstrate applications of theoretical ideas. This was accomplished by understanding the differences of the business context and relational therapeutic context, yet seeing the process between those contexts as the same.
- My dissertation committee, editor, as well as my colleagues and friends, all provided a strong support system for me. Yet, what helped me the most is the

support and guidance from my dissertation chair, who practices and lives the Bowenian theoretical approach. He helped me to manage my anxiety in moments of crisis, reflect on my emotional process in a thoughtful way, and grow as an independent professional. Therefore, the emotional process that was established with my dissertation chair had a strong influence on the successful completion of this dissertation.

- In a similar way, my ability to not only educate but to also practice and live by the theoretical concepts that I was sharing with the participants influenced training results. Specifically, it had effect on participants' reactions to the training, their ability to grasp the information, and their willingness to change behavior. My ability to navigate the emotional processes from the systemic perspective also helped me navigate requirements of the dissertation process.
- The New World Kirkpatrick model offered systemic and structured evaluation of the training program, which helped me to stay organized and focused during the training evaluation process.

Recommendations to Self

- Continue to apply and describe relational systems thinking knowledge in both the therapeutic and business contexts.
- Evaluate the effect of other therapeutic concepts from Bowen family systems theory on the organizational goals.
- Expand and describe my understanding of the research participant-researcher-dissertation chair relationships.

- Describe personal ideas about additions to the New World Kirkpatrick model, which could help expand, yet simplify, the application of this model in a systemic way.
- Trainers play a central role in the training process. As a trainer I moved this training program through obstacles that others might not be willing to resolve. Exploration of my effect on the training program could be beneficial in identifying strengths in applying relational based trainings and advancements of future research.
- People drive, sell, and repair cars all over the world. For the purpose of this study, the CDS training program was conducted in the U.S. and in the English language. Therefore, it would be interesting to note how the training would be received in other languages and other countries. I speak fluent Russian and I would like to apply this training in Russian-speaking professional contexts.

Conclusions Related to the Field of Marriage and Family Therapy

- Marriage and family therapists possess great relational diversity, depth of conceptual knowledge, awareness of the importance of context, and understandings that help them navigate interconnected and complex organizational systems. Their relational skills offer unique systemic perspectives beneficial to corporate settings and the sales environment. Marriage and family therapists possess knowledge that is respected and needed in the business environment, especially sales and customer service.
- Marriage and family therapists' education helps them continuously enhance relational skills with individuals they are working with. Therefore, they are

highly skilled and capable to provide comprehensive, relationally based trainings in corporate settings.

- This research project demonstrates successful application of three relational concepts from the Bowen family systems theory: relational triangles, chronic anxiety, and differentiation of self. This means, Bowen family systems theory is valuable in the business environment.
- Marriage and family therapists are successful trainers because they can identify and honor different intellectual and emotional needs of their training participants and, similarly to working with families, work with professionals who possess different learning styles in the group.
- This research project provides evidence for the business community that utilization of relational concepts and hiring marriage and family therapy professionals is valuable and could help accomplish their business needs. This creates value for marriage and family therapy professionals outside the traditional therapeutic environment.
- The New World Kirkpatrick model offers systemic and structured evaluation of the training program, which is balanced with systemic ideas valued by marriage and family therapy professionals.
- There is a gap between application and theory of relational concepts in terms of evaluating training effectiveness.
- Bowen family systems theory concepts help sales and service professionals, who were not exposed to the relational concepts before, to think differently about human relationships and identify their own role in those relationships.

This led to behavioral change in sales and service professionals, which improved their ability to relate to customers and function more effectively in the business environment.

- There seems to be a desire in the business community to provide a "fast-food" type of learning. Thankfully, the human brain is capable to grow beyond the "fast-food" experience of learning and skill development. Offering a stable and constant training experience allowed me, as a trainer, to developed richer relationships with trainees, which allowed trainees' learning to thrive. Marriage and family therapist, specifically those who work from the Bowen family systems theory perspective, are well skilled to develop lasting relationships with individuals they are working with and help individuals grow at different stages of their development.
- Marriage and family therapists' skills, which focus on navigating multiple perspectives in the room at the same time, are central in being able to navigate diverse perspectives and educational levels of individuals during the group training.

Recommendations to the Field of Marriage and Family Therapy

- The marriage and family therapy community could benefit from expanding and diversifying application of systems thinking ideas outside the traditional family therapy contexts.
- Organizations are searching for professionals who would be able to navigate multiple organizational systems. Yet, marriage and family therapists'

professional name is misleading and has negative effect on organizations' first impression about marriage and family therapy community.

- The marriage and family therapy community should continue to apply three relational concepts from the Bowen family systems theory: relational triangles, chronic anxiety, and differentiation of self into business environments like internal relationships, sales, and customer service.
- Individuals, programs, and a field are often stuck in applying marriage and family therapy knowledge in traditional clinical settings. I encourage marriage and family therapy professionals to apply their knowledge in non-traditional settings. This would help continue to legitimize the systemic training in marriage and family profession as diverse and applicable in variety of systems.
- Defining strategies and content of the relational based trainings from systemic perspectives could help other professionals identify value in knowledge and skills brought by marriage and family therapists and, with that, legitimize their unique knowledge in other fields. Hence, the field of marriage and family therapy could benefit from focusing on three major areas of training: content development, delivery, and evaluation.
- The trainer's modeling behavior has a significant effect on the trainees' ability to grasp new information, being motivated to learn, and transfer the newly learned behavior into other contexts. The skills of the marriage and family therapists could help improve that modeling behavior. More research about

trainers' modeling behavior, specifically how marriage and family therapists could help enhance modeling behavior, is recommended.

- Technology based learning, like follow up email and videos with training overviews, were utilized during this research project to reinforce newly learned knowledge. Future research should explore technology-based learning on sales and service professionals and how the knowledge possessed by marriage and family therapists could enhance the technology-based learning.
- Training participants are active learners, rather than passive recipients of information. Marriage and family therapists, as trainers, are masters of non-direct learning, learning that happens through modeling. This allows individuals to actively learn from their discoveries and errors in a welcoming and non-judgmental way, something that direct supervisors are often not able to provide because of their professional roles. Therefore, expansion of marriage and family therapists' skills as collaborators with direct supervisors and employees in diverse environments is recommended.

Marriage and Family Therapists' Job

Thinking that marriage and family therapy professionals are not able to apply relational concepts in the automotive environment is similar to thinking that they are not able to work with clients who happened to be employed by the dealership. It would be simply against systemic principles. This study was able to expand the application of marriage and family therapy ideas beyond the realm of traditional therapy by successfully applying systems theory ideas in a corporate environment. Those results were possible because I came with the knowledge of systems thinking that helped me apply theoretical idea and navigate a business environment. This is why I can go to the dealership with my skills and be successful. Marriage and family therapists are great for organizational needs. We possess knowledge that makes us different from other trainers and coaches.

A typical sales trainer is focusing on the content of the training material, while ignoring different relational needs, desires, and motivations of their participants. They focus on motivating the sales and service professionals through financial rewards, which are not always in line with the desires of their trainees. As a marriage and family therapist I was able to connect to my participants' needs, desires, and motivations that were tailored to them. I was able to navigate emotional needs of multiple members of the training group and provided them with information that was beneficial to them in the moment of their professional development.

My marriage and family therapist skills helped me to maintain therapeutic flexibility, respect diverse opinions and perspectives, see value in different organizational roles, and identify the effect of the potential problem or solution on other areas of the organization. Working from the Bowen family systems thinking perspective, I was able to describe relational concepts and demonstrate those concepts in my every interaction with the participants. My relationship with the participants taught them how to improve relationships with their customers and demonstrated how to be better humans to people, which is a step beyond customer service. Being a therapist helped me not get triangulated in participants' anxieties, maintain my therapeutic flexibility, and be authentically empathetic to their needs, concerns, desires, and different emotional expressions.

Limitations

In describing limitations to this study, I aim to contemplate contexts that could limit other professionals who would try to implement this research in their context. Yet, that in itself is almost impossible. The success of this training was not accomplished because as a trainer and researcher I was able to evaluate the training environment so precisely that I was able to prepare for all setbacks that came my way. Instead, I practiced my therapeutic flexibility and I was prepared to being unprepared, to know that I do not know all, and to relate to the professionals who have different relational ideas and perspectives. My education and my ability to relate will defer significantly even from the professionals who are from my cohort because we all have different life experiences and different learning styles. Therefore, the biggest limitation to applying this training will come from the professional who would like to apply this training in their context. The trainer/researcher will have an effect on their system in the same way as the system will have an effect on them.

With that said, the second biggest limitation will come from the training environment. In the same way as siblings are born to differently structured families, the next researcher who would try to apply this training at the same dealership will be faced with different professional contexts. They will either have new professionals who have begun to work at the dealership or they will not have differently educated professionals who already went through this training. Most likely, limitation will come from trying to apply this training in a different professional environment. Therefore, the biggest limitation will come from stakeholders who possess a different attitude toward trainings and who provide different support system to their employees. For instance, the uniqueness of the dealership where I worked is that they have two service drives, as they are the biggest dealership of their make in the country. Therefore, stakeholder and service department managers that I worked with have different goals and values as the other dealerships would. Finally, the training content is also not set in stone. It was intentional action from me, as the researcher/trainer, to keep the content of the training partially flexible so that the content would be modified based on the participants' needs. No participants are the same, therefore no training content remained the same.

At the same time, there were a few limitation of the study that I wish could be modified. For instance, the participants were forced to participate in the training, if not directly then indirectly, as not participating in the training could made them look as a bad (not invested or committed) employee. Additionally, the training location was limited to one dealership, which lowers the reliability of applying the training data to other corporate sites. Similarly, the majority of participants (66.7%) had over five years working in the field, and only one participant (5.6%) worked in the field for less than one year, which also lowered the reliability of applying the training data to other corporate sites.

Suggested Improvements of the Training

The New World Kirkpatrick model encourages the trainer/researcher to evaluate and make modifications to the training as the training takes place. This is done to prioritize participants' learning and present the training in the most favorable, comprehendible, and relevant way. Therefore, I made changes to the training as the training took place, rather than waiting to reflect on those modifications at the end of the training. The few changes that I have made depended on my ability to stay flexible and adjust to the business needs. In chapter IV I described changes that were made to the training content to meet participants' learning styles and current knowledge.

Some changes were influenced by organizational context. For instance, service associates did not want to leave their work environment for training during busy days, like the end of the month and special holidays. Therefore, the training's schedule was adjusted to the associates' work environment, allowing participants to concentrate on making money. Another adjustment was connected to follow up style with participants. Originally, I communicated with the participants via email that they provided to me. However, the associates could access that email only from a work computer or had to go through special steps to set up a company email on their smart phones. This was challenging because when associates are at work, they rarely have down time to watch a training video or read my email. Additionally, they are in the open space work area where they do not have complete privacy. Hence, I began to communicate with the participants via text message and noticed a much quicker and positive response.

Those changes were beneficial and made a positive impact on the CDS training at the participating dealership. However, changes to the training should be evaluated and modified based on three fundamental and equally important ingredients of the training application: (1) skills and knowledge of the trainer, (2) context of the dealership, and (3) the training program. The New World Kirkpatrick model supports flexibility required by the business environment and provides structure favorable by educational environment.

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Appendices

Appendix A

Research Questions

The overall research question for this study

Does the Calm-Driven Service (CDS) training program help automotive service professionals enhance their ability to relate to their customers in a thoughtful and reflective way?

The four follow up questions that explore benefits for the participant

1. Are service associates (participants) able to manage relational intensity in a calmer and more organized manner?
2. Did the service associates (participants) gain a better understanding of the relational patterns?
3. Are service associates (participants) able to establish and maintain emotionally healthier professional relationships?
4. Does the CDS training program improve associates' job satisfaction?

The three questions that explore benefits for the dealership

5. Does the CDS training program improve customer satisfaction?
6. Does the CDS training program improve associates' retention?
7. Does the CDS training program increase sales/profit?

Appendix B

Letter of Intent

To Nova Southeastern University Institutional Review Board,

Katia Tikhonravova requested permission to collect research data from the [Automotive Group in South Florida] and our associates through a training program entitled, "Calm-Driven Dealership Practices: Relationally Focused Service Training." I have been informed of the purpose of the study and the nature of the research procedures. I have also been given an opportunity to ask questions about the research.

As the general manager of the [Automotive Group in South Florida's Dealership], I am authorized to grant permission to have the researcher recruit research subjects at our dealership. Katia Tikhonravova is allowed to collect the research data during work hours at our dealership. The data collected will be provided or collected by the researcher without any associate's name, ID number, or other identifiable information.

[Site Name]
[Address]
[Phone]

Please contact me if you have any questions.

Sincerely,

[The General Manager's name]
[Cell] [Office]
[Email]

Appendix C

Signing Sheet for Individual Relational Training

Please write your name:

____

____

____

____

____

____

____

____

Appendix D

Calm-Driven Service Training Calendar

Please select the best date and time for the individual training #1

February 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12 **3:30pm-4:45pm** **5:00pm-6:15pm**	13 **3:00pm-4:15pm** **4:45pm-6:00pm**	14 *Valentine's Day* **9:45am-11:00am**	15 **9:00am-10:15am** **11:00am-12:15pm** **1:00pm-2:15pm**	16 *Chinese New Year* **9:45am-11:00am**	17
18	19 *President's Day* **3:30pm-4:45pm** **5:00pm-6:15pm**	20 **9:00am-10:15am** **3:00pm-4:15pm**	21 **9:45am-11:00am**	22 **9:00am-10:15am** **11:00am-12:15pm** **1:00pm-2:15pm**	23 **9:45am-11:00am**	24
25	26	27	28			

Please select the best date and time for the individual training #2

March 2018

Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1	2	3
4	5	6	7	8	9	10
11	12 **3:30pm-4:45pm** **5:00pm-6:15pm**	13 **9:00am-10:15am** **3:00pm-4:15pm**	14 **9:45am-11:00am**	15 **9:00am-10:15am** **11:00am-12:15pm** **1:00pm-2:15pm**	16 **9:45am-11:00am**	17
18	19 **3:30pm-4:45pm** **5:00pm-6:15pm**	20 **9:00am-10:15am** **3:00pm-4:15pm**	21 **9:45am-11:00am**	22 **9:00am-10:15am** **11:00am-12:15pm** **1:00pm-2:15pm**	23 **9:45am-11:00am**	24
25	26	27	28			

Appendix E

Data Collection Timeline

The data collection timeline marked the following dates:

October 1, 2017 – Measuring average CSI score for September, 2017 (#1).

November 1, 2017 – Measuring average CSI score for October, 2017 (#2).

December 1, 2017 - Measuring average CSI score for November, 2017 (#3).

Taking notes in personal journal.

December 4, 2017 – First group-training. Collecting during-the-training survey #1. Taking notes in personal journal.

December 11, 2017 – Second group-training. Collecting during-the-training survey #2. Taking notes in personal journal.

January 8, 2018 – Third group-training. Collecting during-the-training survey #3. Taking notes in personal journal. Measuring average CSI score for December, 2017 (#4).

January 15, 2018 – Fourth group-training. Collecting during-the-training survey #4. Taking notes in personal journal.

January 22, 2018 – Fifth group-training. Collecting during-the-training survey #5. Taking notes in personal journal.

February 5, 2018 – Sixth group-training. Collecting during-the-training survey #6. Taking notes in personal journal. Measuring average CSI score for January, 2018 (#5).

February 12, 2018 –The first set of individual coaching. Conducting semi-structured interview #1. Taking notes in personal journal.

March 12, 2018 –The second set of individual coaching. Conducting semi-structured interview #2. Taking notes in personal journal. Measuring average CSI score for February, 2018 (#6).

April 1, 2018 – Measuring average CSI score for March, 2018 (#7).

May 1, 2018 – Measuring average CSI score for April, 2018 (#8).

June 1, 2018 – Measuring average CSI score for May, 2018 (#9).

Appendix F

The "Calm-Driven" Service Training Program Logistics

The Calm-Driven Service training program focuses on improving relational skills. This training program explores management of relationships at the workplace, such as relationships with colleagues, management, and customers in a respectful and professional manner. The training focuses on developing and maintaining relationships and managing service processes while achieving organizational goals, needs of customers, and personal career goals.

Logistics

Modality. The training will be held in a face-to-face setting. Participants will be supplied with educational training manuals.

Location. The training will be hosted at the dealership.

Dates and Times. To be determined.

Length. There will be six group-training sessions (60-minutes each), which will be held once a week during the months of December, 2017 and January, 2018. Upon completion of the six group-training sessions, there will be two individual-coaching sessions (60-minutes each), which will take place once a month. The first individual-coaching session will take place in February 2018. The second individual-coaching session will take place in March 2018. Therefore, the length of the program is approximately 120 days (4 months).

Grading. Participants will not be graded.

Expectations

The participants and the instructor are expected to come prepared for the training, stay for the duration of the training, be attentive, and express professionalism. The instructor is expected to begin and end training on time. Participants are expected to honor and respect each other, demonstrate professional and ethical conduct, and exhibit respect for culture, diversity, and inclusion.

Enroll/Withdrawal from the training program

Participants can be enrolled in this training program no later than the first day of the training. Participants can withdraw from this training at any time without providing an explanation.

Ethics and Diversity

Derogatory and discriminative comments toward any culture or diversity will not be tolerated; this includes respect for race, color, gender, national origin, sexual orientation, gender expression, age, religion or creed, body ability, socio-economic status, pregnancy, ancestry, marital status, political beliefs and affiliations, military service, and veteran status.

As a training program facilitator, Katia Tikhonravova is committed to provide space for the participants where they could express freedom of inquiry, thought, and expression. She will be focused on promoting inclusion, diversity, respect, and affirmative practices in all training settings.

Anti-Discrimination

Hate is not welcome here. The training program facilitator and the dealership hold a strong stance against discrimination.

In case of apparent discrimination, the following procedure will be engaged. Step one: if a participant is engaged in apparent discriminative actions, the participant will need to speak to his or her direct supervisor and will have a written warning in their file. Step two: if the participant continues discriminative practices, the participant will be put on probation from the training and be required to speak with the dealership's HR. Step three: dismissal from the training program.

Participant Counseling Services

Due to the nature of the training program, personal and professional relationships are being discussed. In case a participant finds him or herself going through emotional difficulties and challenging life circumstances, he or she will be encouraged to contact the instructor and/or HR office. As an instructor, I will assess whether the participant could benefit from meeting with a therapist individually and I will provide appropriate referral.

I have read and understood the training logistics.

Name____

Signature ______________________________ Date _________________________

NOVA SOUTHEASTERN UNIVERSITY
College of Arts, Humanities, and Social Sciences

Appendix G

Training Participants Informed Consent Form

I, ____ consent to be in a research study entitled *The New World Kirkpatrick Evaluation of Relationally Based on the "Calm-Driven" Service Training for the Automotive Industry.*

Who is doing this research study?

Institution: College of Arts, Humanities, and Social Sciences of Nova Southeastern University, Department of Marriage and Family Therapy.

Principal investigator: Katia Tikhonravova, M.S., LMFT
Cell: (954) 253-2720; email: et427@mynsu.nova.edu.
Co-investigator: Chris Burnett, Psy.D.
office (954) 262-3010; email: burnett@mynsu.nova.edu.

Site: Rick Case Honda. 15700 Rick Case Honda Way, Davie, FL, 33331
Funding Source: Unfunded.
IRB Approval #: Pending.

Research Participants Rights

For questions/concerns about your research rights, contact: Institutional Review Board (IRB) of Nova Southeastern University (954) 262-5369/Toll Free: 866-499-0790, IRB@nsu.nova.edu. You may also visit the NSU IRB website at www.nova.edu/irb/information-for-research-participants for further information regarding your rights as a research participant.

What is this research study about?

This is a research study, designed to test and create new ideas that other people can use. The purpose of this research study is to assess effectiveness of the "Calm-Driven" relationally based training program in the automotive environment. This would help improve existing training programs to support automotive industry growth.

What is the Calm-Driven training program?

The relationally based training program includes six group-sessions (focused on learning new skills) and two individual-coaching/interview sessions (focused on applying new skills). The focus of the training is to help participants learn and apply relational concepts to improve customers' service and retention.

Initials: ____________________________ Date: ____________________________

3301 College Avenue • Fort Lauderdale, Florida 33314-7796
(954) 262-3000 • 800-672-7978 • Fax: (954) 262-3968 • Email: *cahss@nsu.nova.edu* • Web site: *http:/cahss.nova.edu*

What are the Calm-Driven training program outcomes?
1) To be able to manage relational intensity in a calmer and more organized way.
2) To gain better understanding of relational patterns.
3) To be able to establish and maintain emotionally healthier professional relationships.

Why are you asking me?
You are invited to participate in this study because you are an established automotive service professional that the administration and I found able to provide excellent customer service experience. This study will include 7-10 people.

What will I be doing if I agree to be in this research study?
While you are taking part in this research study, this is what you will be doing:
- You will be asked to participate in six (6) group-training sessions (1 hour each), which will take place once a week during the months of December, 2017 and January, 2018. After each group-training, you will be asked to fill out a multiple choice questionnaire about your experience in the training.
- Upon completion of the group-trainings, you will be asked to provide feedback about your experience during two (2) individual-coaching/interview sessions (45-minutes each), for which you will meet with the researcher once a month. During the individual coaching/interview sessions, you will be asked open-ended questions about your application of the obtained knowledge in your personal and professional life. You will be interviewed by the researcher, Katia Tikhonravova.

What if I do not want to participate or I want to leave the study?
You have the right to leave this study at any time or refuse to participate. If you do decide to leave or you decide not to participate, you will not experience any penalty or loss of services you have a right to receive. If you choose to stop being in the study before it is over, any information about you that was collected **before** the date you leave the study will be kept in the research records for 36 months from the end of the study and may be used as a part of the research.

Could I be removed from the study early by the research team?
Reasons why the researchers may remove you from the study early include: you are no longer employed by Rick Case Automotive Group, your actions endanger the emotional safety of other participants, and/or you miss more than two (2) training sessions.

Initials: ______________________________ Date: ______________________________

Are there possible risks for participating in this research study?
This research study involves minimal risk to you, meaning they are not thought to be greater than other risks you experience every day. To the best of our knowledge, the things you will be doing have no more risk of harm than you would have in everyday life.

Will this affect my employment?
No. This study is focused on assessing the training program, rather than an associate's performance level. The program outcomes will be viewed and shared for the group overall, not on an individual basis.

What if there is new information learned during the study that may affect my decision to remain in the study?
If significant new information relating to the study becomes available, which may relate to whether you want to remain in this study, this information will be given to you by the investigators. You may be asked to sign a new Informed Consent Form if the information is given to you after you have joined the study.

Are there possible benefits for participating in this research study?
The possible benefit of your being in this research study is being introduced to relational concepts that are utilized by therapists all over the world to help individuals manage professional and personal relationships. There is no guarantee or promise that you will receive any benefit from this study. We hope the information learned from this research study will benefit other people with similar conditions in the future.

Will I get paid for being in the study? Will it cost me anything?
You will not be given any payments or compensation for being in this research study. There are no costs to you for being in this research study.

How will you keep my information private?
Information we learn about you in this research study will be handled in a confidential manner, within the limits of the law and will be limited to people who have a need to review this information. To ensure each participant's privacy, the researcher will not use the participant's name or other personal identifiable data in the research documents and all digital data will be kept on an encrypted flash drive. This data will be available to the researcher, the Institutional Review Board, and other representatives of this institution, and any regulatory and granting agencies (if applicable). If we publish the results of the study in a scientific journal or book, we will not identify you. All confidential data will be kept securely in the researcher's office safe. All data will be kept for 36 months and destroyed after that time by the researcher.

Initials: _____________________________ Date: _____________________________

Is there any audio or video recording?

This research project will include a digital audio recording of the interview. This recording will be available to the researcher (Katia Tikhonravova), the Institutional Review Board, and other representatives of this institution, and the dissertation chair (Dr. Burnett). The recording will be kept, stored, and destroyed as stated in the section above. Because what is in the recording could be used to find out that it is you, it is not possible to be sure that the recording will always be kept confidential. The researcher will try to keep anyone not working on the research from listening to or viewing the recording. There will be no video recording for this study.

Whom can I contact if I have questions, concerns, comments, or complaints?

If you have questions about the research, your research rights, or if you experience an injury because of the research, please contact Katia Tikhonravova at (954) 253-2720 or et427@mynsu.nova.edu. If the primary researcher is not available, contact Dr. Christopher Burnett at burnett@mynsu.nova.edu. You may also contact the IRB at the numbers indicated above with questions about your research rights.

All space below was intentionally left blank.

Initials: ______________________________ Date: ______________________________

Research Consent & Authorization Signature Section

Voluntary Participation - You are not required to participate in this study. In the event you do participate, you may leave this research study at any time. If you leave this research study before it is completed, there will be no penalty to you, and you will not lose any benefits to which you are entitled.

If you agree to participate in this research study, sign this section. You will be given a signed copy of this form to keep. You do not waive any of your legal rights by signing this form.

SIGN THIS FORM ONLY IF THE STATEMENTS LISTED BELOW ARE TRUE:

- You have read the above information.
- Your questions have been answered

Adult Signature Section

I have voluntarily decided to take part in this research study.

Printed Name of Participant	Signature of Participant	Date

Printed Name of Person Obtaining Consent and Authorization	Signature of Person Obtaining Consent & Authorization	Date

Appendix H

The Automotive Group in South Florida Philosophy

Rick Case Automotive Careers (2017) outlines the Automotive Group of South Florida Philosophy as:

> Customers: To provide our customers with the best service, best value products and facilities of the greatest convenience in a pleasant environment that exceeds their expectations, while operating with the highest levels of honesty, integrity, responsibility and professionalism.
>
> Associates: To create a positive environment for associates that encourages excellent customer relations, communication with management, and promotes creativity and productivity, while providing an opportunity to grow with our company.
>
> Community: To contribute to the community in which we do business, including helping needy children through our over 25 year participation and contribution to Boys & Girls Clubs and our Rick Case Bikes for Kids program, which each year provides thousands of needy children with bikes for the holidays.
>
> Our Goal: To continuously prepare our company for growth by providing our personnel with training at all levels and by encouraging their commitment to excel and advance within the organization, exploring all growth possibilities and by respecting our image through satisfying our customers and treating them as we would our best friend. (Our Philosophy section, para. 1)

Appendix I

During-the-Coaching Questions

Baker and Titelman (2011) and Papero (Bregman, 2011) offered the following questions to evaluate adult learners who have been introduced to the Bowen Family Systems Theory concepts. These questions have been modified from the original to meet the work environment context.

First Coaching-Session: Questions

(1) Would you say that this training had any effect on your relationships with customers? Can you share an example? [This question evaluates Level 4: results]

(2) Would you say that this training had any effect on your relationships with your coworkers? Can you share an example? [This question evaluates Level 4: results]

(3) Have you noticed any difference in your colleagues sense you attended this training? [This question evaluates Level 3: Behavior]

(4) Have you noticed any difference in yourself sense you attended this training? [This question evaluates Level 3: Behavior]

(5) What information, if any, from the training program did you find most useful to your work environment? [This question evaluates Level 2: Learning]

(6) What information, if any, from the training program did you find most confusing or irrelevant to your work environment? [This question evaluates Level 2: Learning]

(7) What would you recommend to change or keep the same in my, the trainer's, presentation style, training content, or organization of the training to improve your learning experience? [This question evaluates Level 1: Reaction]

Second Coaching-Session: Questions

(1) Please describe your experience of participating in individual training with me a few weeks ago. [This questions evaluates Level 1: Reaction]

(2) Would you say that you still utilize the relational concepts that you learned during the group-training? Follow up questions: Can you share an example? or, What motivated you to stop? [This questions evaluates Level 2: Learning and Level 3: Behavior]

(3) Do you notice any difference in your job satisfaction since November 2017 (before the training)? [This questions evaluates Level 4: Results]

(4) Do you notice any difference in your paycheck since November 2017 (before the training)? [This questions evaluates Level 4: Results]

(5) Would you say that you have sufficient training to understand customer relations? [This questions evaluates Level 1: Reaction]

Appendix J

Informal During-the-Group Training Questions

The first four questions evaluate the participant's learning (Level 2). The fifth and sixth questions evaluate participant's reaction to the training (Level 1).

(1) What concepts from the training program have you found the most interesting to you?

(2) What concepts from the training program did you find the least interesting to you?

(3) What concepts, if any, from the training program did you find most useful to your work environment?

(4) What concepts, if any, from the training program did you find the most difficult or irrelevant to your work environment?

(5) What would you recommend to change or keep the same in my, the trainer's, presentation style to improve your learning experience?

(6) What were positive and negative aspects of the program on your own learning process?

Appendix K

Participants' Reaction to the Training Survey

To be collected after each group-training (6 times)

Evaluate your reaction to the training by answering the following eight questions.

Please choose the most appropriate scale:

(1) The content was easy for me to follow.

1-strongly disagree 2-disagree 3-agree 4-strongly agree

(2) What I learned will help me do my job better.

1-strongly disagree 2-disagree 3-agree 4-strongly agree

(3) I took responsibility for being involved in the training program.

1- strongly disagree 2-disagree 3-agree 4-strongly agree

(4) I would recommend this program to others.

1- strongly disagree 2-disagree 3-agree 4-strongly agree

(5) This training has assisted me in improving my ability to manage relational intensity in a calmer and more organized manner in the automotive service environment.

1- strongly disagree 2-disagree 3-agree 4-strongly agree

(6) This training has assisted me in improving my ability to better understand the relational patterns.

1- strongly disagree 2-disagree 3-agree 4-strongly agree

(7) This training has assisted me in improving my ability to establish and maintain emotionally healthier professional relationships.

1- strongly disagree 2-disagree 3-agree 4-strongly agree

(8) The trainer presented material in a clear and effective way.

1- strongly disagree 2-disagree 3-agree 4-strongly agree

Appendix L

Calm-Driven Training Reaction Sheet

DO NOT WRITE YOUR NAME

Please circle the appropriate response after each statement.

	Strongly Disagree		*Agree*		*Strongly Agree*
1. The material was relevant to my job.	1	2	3	4	5
2. The material was presented in an interesting way.	1	2	3	4	5
3. The material helped me to think differently about relationships.	1	2	3	4	5
4. The material helped me to behave differently with others.	1	2	3	4	5
5. The instructor is an effective communicator.	1	2	3	4	5
6. The instructor was prepared.	1	2	3	4	5
7. The handouts were helpful to me.	1	2	3	4	5
8. The visuals were helpful to me.	1	2	3	4	5
9. The group exercises were helpful to me.	1	2	3	4	5
10. The videos were helpful to me.	1	2	3	4	5
11. There was a good balance between presentation and group involvement.	1	2	3	4	5
12. I feel like the training will help me to do my job better.	1	2	3	4	5
13. The schedule was suitable.	1	2	3	4	5

14. What topic was the most beneficial, if at all?

15. What would have improved the program?

Appendix M

The Group Training Handouts for Week One

CALM-DRIVEN DEALERSHIP PRACTICES

RELATIONALLY FOCUSED SERVICE TRAINING

Katia Tikhonravova, Ph.D.(c), LMFT

OVERVIEW

This training covers relational concepts about human systems:
Week 1: Survival of the Fittest: Natural Service Advisor Selection—managing customers' 3 relational survival needs to become their leader.
Week 2: "It's all about me"— 4 rules to identify and manage relational patterns.
Week 3: Anxiety—actions customers take when they are anxious and 3 ways you could manage it.
Week 4: Relational triangles—2 ways to identify and manage situations when you are being pulled into someone else's problems.
Week 5: Dimensions of self-management—3 steps to care for your own emotional process before you can help others.
Week 6: The Roles We Play— 2 methods of managing Over- and Under-Functioning.

Dear Calm-Driven Service Training participant,

Welcome to the Calm-Driven Service Training. Be proud of yourself for making into this program: you are qualified individual that administration and I found able to provide excellent customer service experiences. This program looked for participants who are able to grow personally and professionally.

This program is designed to learn about relational skills in the automotive service environment. To be an effective leader at the [name of the company], you will be learning about relational anxiety, relational triangles, and dimensions of self-management.

As a trainer of this program, my primary focus is to support the success of all participants by providing a personal and socially safe climate. I look forward to offering support to you and growing with you personally and professionally. I encourage you to reach out if you have concerns.

I wish you much success in your professional growth.

Warmly,

Katia Tikhonravova
Email: katiatikho@gmail.com or et427@mynsu.nova.edu
Cell (954) 253-2720

Open Door Policy: I, like you, value a friendly, respectful and respectful work environment. Please come to me with your questions or concerns. You can offer a feedback in person, phone, or email.

Before we start

Setting. This training is a fundamental addition to the Rick Case University's training, rather than a substitution. This training explains current sales and service process from the relational perspective. We are not changing the process—we making it better.

Confidentiality. Discussions and examples shared by your colleagues should be kept confidential within this group.

Discrimination. Hate is not welcome here. Any derogatory comments and discrimination will not be tolerated.

Communication. Questions, comments, and recommendations are welcomed during the training. Do not wait until the end of the training.

Performance. There will be no grading of your performance during this training. There is no wrong way for you to understand it. If you are interested in this material and you did not understand something, it is my job as a facilitator to help you grasp this information.

WEEK 1: Survival of the Fittest: Natural Service Advisor Selection

Managing Customers' 3 Relational Survival Needs to Become Their Leader

Introductions

- Name
- Position
- Years with the company
- Favorite car you ever owned. What was it about that car?

A car is more than a method of transportation; it is an emotional connection.

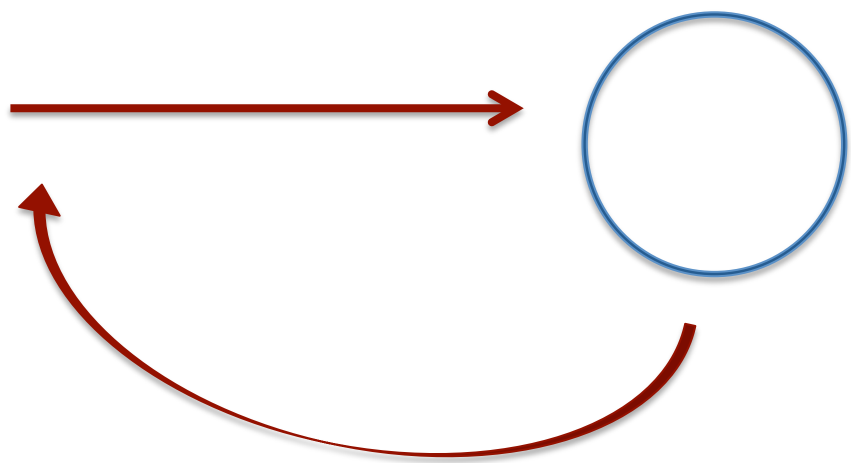
Meeting customers' relational needs will make a service advisor different from other service advisors. But how do relationships work and how does a service advisor relate to customers' emotional needs?

People are driven by 3 universal relational human needs of energy efficiency.

1. Gain Energy

2. Preserve Energy

3. Direct Energy toward a particular purpose



Examples:

Food – The evolution from grass to fast-food has affected human brain development.

Relationships – Humans are herd animals. Our nature is to live in groups. Survival instincts are universal and they are as applicable today as they were millions of years ago.

Service Advisor

Service professionals are driven by the same relational human needs.

1. Gain energy.

Learning about the job, customers, and process comes from personal experience, family, and colleagues.

Self of the service advisor:

Who did you learn from?

2. Preserve energy.

Making assumptions about customers.

3. Direct energy toward a particular purpose:

Equifinality.

Equifinality – the principle that, in open systems, a given end state can be reached by many potential means.

1. There is no specific way to be a service advisor. It is not about who you are; it is about the relationships you are able to create.
2. There are multiple sales and service processes that have their own benefits and challenges.
   Relationships are priceless. A dealer does not sell cars, parts, or service; they sell relationships.
3. There is not ONE way to be the service advisor.
   Value yourself. Value your originality. People like you for who you are. Sell yourself.
4. Do not try to be someone you are not.
   If you are shy – you can build relationships by listening and being curious.
   If you are expressive – you can build relationships by expressing yourself.
5. Focus on improving what you are doing best.
   What is it about YOU that connects people to you?
   How do you connect to others?
   How do you connect to your best friends?
   What do you value in others?
   What community do you want to build around yourself?

Customers

Customers are driven by relational needs.

1. Gain energy.

For customers it is not whether to service a car; it is about where to service a car.
Customers ask themselves: “Where will I ‘gain’ the most?”

Self of the customer:

We all different and we have different styles of buying. For example, in South Korea, Wal-Mart failed. In other words, you cannot sell to everyone the same way.

2. Preserve energy.

1. Customers have emotional connection with their vehicles.
2. What values and meanings do your customers hold about their relationships with their car?
3. Customers have assumptions about the dealership and you.

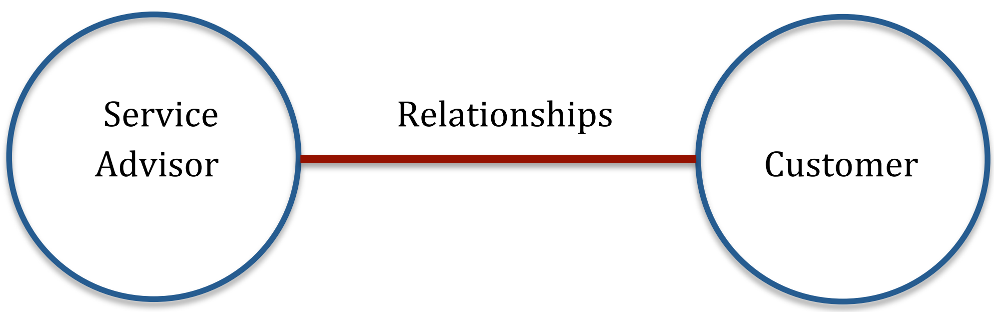
3. Direct energy toward a particular purpose:

1. What are customers’ relationships with their car? Do they treat it us a “hook up,” “live together,” or are they “married and have kids with their car”? This is a particular energy exchange.
2. How do they treat the dealership?
3. Customers will only invest in the relationships that they see as beneficial to their own survival.

In relationships, 1+1=3

The third part is relationships. What we will be working on is a relationship.

1. Self of the service advisor
2. Self of the customer
3. Relationships between the service advisor and the customer



Customer and Service Advisor Relationships

Build your relationships with customers based on 3 relational survival needs:

1. Gain energy.

Listening.

2. Preserve energy.

Create a space where customer feels safe, understood, and welcomed.

3. Direct energy toward a particular purpose:

Customers who feel like the service advisor has their best interest in mind will actively pursue working with him or her.

#1: Gaining Energy

People always had "cars" – horses and carriages. A car is more than transportation; it is emotional connection, which represents an individual's ability to "survive." A car is an improved convenience. What does a customer gain from their car? What is it about a service advisor that will help customers connect to that service advisor?

Gaining energy in **physical** terms means eating. For example, the customer would have an access to snacks or drinks.
Gaining energy in **relational** terms means gaining useful information.

What information are your customers looking for?

What information would they find favorable and useful?

Traditionally, where do the customers obtain their information?

Customers are looking to secure and improve their own survival. The service advisor that will thrive is the one whose customers believe he or she is looking for their benefits and can improve their survival. The actions toward survival may take multiple forms.

You should actively seek information about your customer's relationships with their car.

Listening

- Listening is the most powerful form of influence.
- Your customer tells you how to close them on your products and services.
- Listening lets customers know that you are a leader, not a persuader.
- When you listen, you let the customer know that you care about them.

Do not tell. Ask.

- What do you like the most about your car?
- Was it everything that you expected?
- Did you know that (product) can (features/benefits)?

Listening helps customers feel:

1. Welcomed

2. Understood

3. Safe

Why do humans value being welcomed, understood, and safe?

#2: Preserving Energy

Customers come for the service but they will come back for the experience.

Physical preservation of energy often assumes resting time, such as comfortable chairs, toys for children, TV, or WiFi. When it comes to preservation of energy from the **relational** perspective, we think about: safety, comfort, time, and convenience.

Assumptions are a way to preserve relational energy. Another method to preserve relational energy is helping your customers feel welcomed, understood, and safe. This leads to comfort and convenience. The service advisor who brings the most comfort and convenience will generate the highest customer retention.

From the customer’s perspective:

Safety
Are you for me or are you against me?
Can I trust you?
Are you authentic with me?
Are you just saying “my pleasure” with your verbal language, but your body language gives me different messages?

Welcomed
Do you make me feel appreciated?
Do you see me as a number or as a person?
Am I comfortable with you?

Understood
Do you hear me?
Are you listening to me or you are in a rush to make your point?

#3: Directing Energy

Will my life, my family's life, or my community's life be improved by working with you?

Directing energy toward a particular purpose means focusing on beneficial human relationships.
For which customer would you "buy chocolate and flowers"?

How do the 3 relational human needs of gaining, preserving, and directing energy play out in your life (personal and professional)?

Which associate do you think will survive in the company?

Week 1 Overview:

1. Service advisors do not sell car parts or services; they sell relationships.
2. A purchase comes after the relationships are established. Customers buy and seek service from dealers they like.
3. Managing relationships with customers, based on universal relational human needs of gaining, preserving, and directing energy, will help service advisors to develop sustainable relationships with their customers.

Appendix N

Calm-Driven Training Participant Demographics

Please circle the response the most appropriate for you:

Department: Express Service Traditional Service Both

Years working with the company in the current position:

0-1 1-2 2-5 5-10 10-20 20+

Years in this field:

0-1 1-2 2-5 5-10 10-20 20+

Please indicate your gender identity:

Female Transgender Female Gender Variant/Non-Conforming

Male Transgender Male Prefer Not to Answer

Please indicate your age group:

0-17 18-24 25-34 35-44 45-54 55-64 65+

Prefer Not to Answer

Please indicate your highest level of education:

High School Diploma/GED Associates Degree Graduate Degree

Some College Undergraduate Degree Prefer Not to Answer

Please indicate your ethnicity (circle all that apply):

American Indian or Alaskan Native	Hispanic/Latino
Asian	White/ Caucasian
Middle Eastern	Mix Ethnicities
Black or African American	Prefer Not to Answer

Appendix O

Calm-Driven Training Sign In Sheet

Please provide your name and preferred methods of contact.

Your Name	Email	Phone Number

Appendix P

Attendance Worksheet

[Day of the week]   Week # [Number]

[Name of the participant] ____

[Name of the participant] ____

[Name of the participant] ____

[Name of the participant] ____

[Name of the participant] ____

Appendix Q

Example of Training Certificates

CORPORATION CLINIC, INC.

Certificate of Completion

AWARDED to

<u>Name of the Participant</u>

FUNDAMENTALS OF CALM-DRIVEN RELATIONALLY FOCUSED SERVICE TRAINING

THIS DAY of

FEBRUARY 5th, 2018

Katia Tikhonravova, Founder and President

Biographical Sketch

Katia Tikhonravova obtained her bachelor's degree in Business Crisis Management from Tomsk Polytechnic University in Tomsk, Russia. She obtained her master and doctorate degrees in marriage and family therapy from Nova Southeastern University in Florida, U.S. Katia is a licensed marriage and family therapist, she is on track to become AAMFT approved supervisor in November 2018. Katia published a book and multiple articles that focus of bringing relationally based systems knowledge into business, sales, and customer service. She is presented her work nationally and internationally at the university settings, conferences, and other educational events.

Katia is in owner of the Corporation Clinic, Inc. a company that works with individuals and organizations that are looking to improve relationships with their customers and between departments by providing relationally based trainings and individual coaching that helps professionals to identify and manage relational anxiety and promote calm, respectful, and supportive relationships at the work environment. Prior to setting her company, Katia had experience of managing restaurant for two years. She also sold cars for Southeast Toyota. In marriage and family therapy field, Katia worked with individuals, couples, and families in multiple settings, including schools, homeless shelter, foster care, substance abuse, and private practice. Katia is an activist for women and LGBT rights.