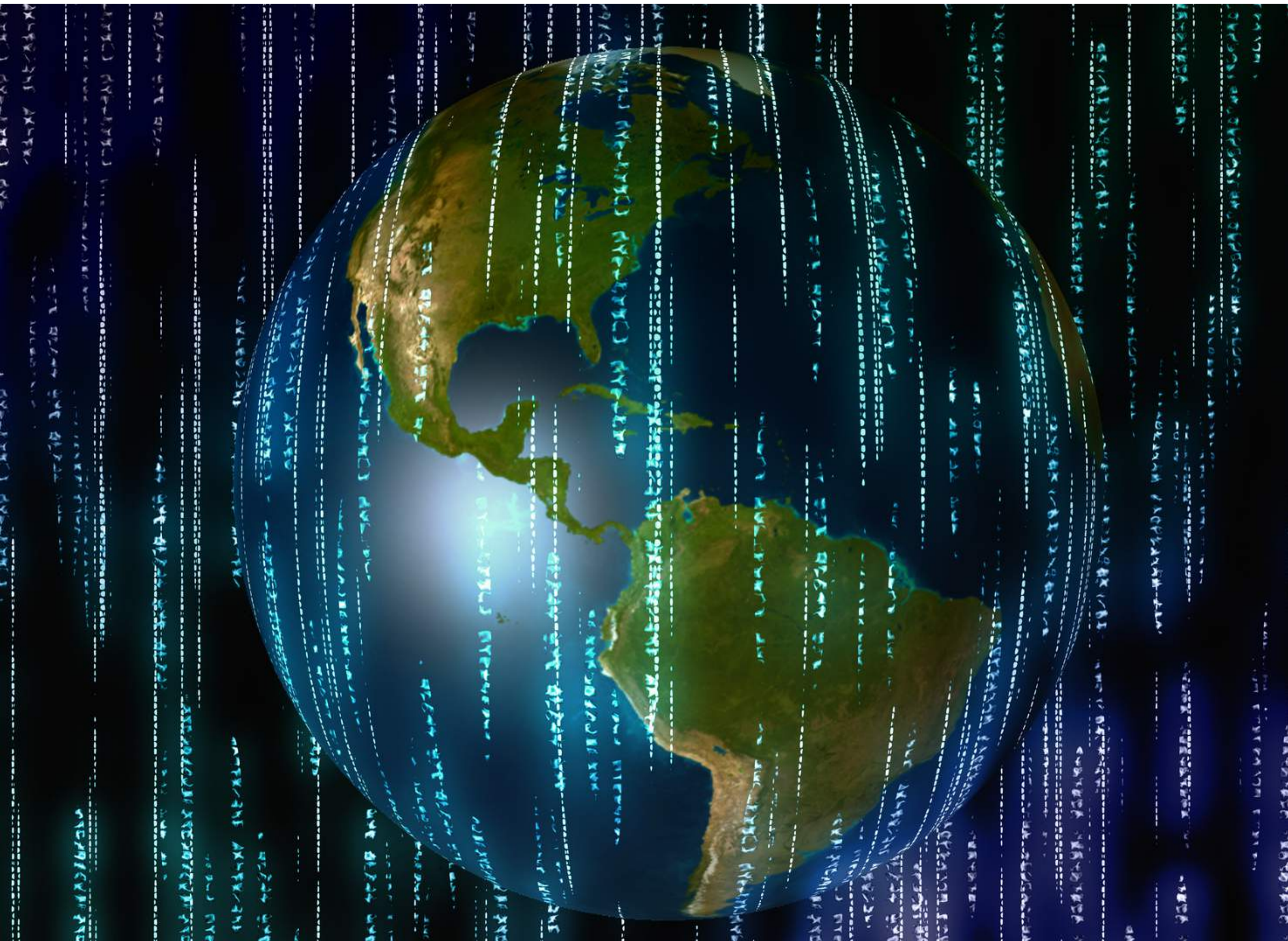
FEBRUARY 2021

PROVIDING LEADERSHIP IN THE NEW NORMAL

DEVELOPING PEOPLE IN A DIGITAL WORLD



Presented by

CUSTOMER ATTUNED LTD

Customer Attuned

Welcome from Ellie Luk

Director of Marketing

Welcome to the February issue of our Newszine, which coincides with our online panel discussion in our series: **Providing Leadership in the New Normal.**

We are delighted to welcome three leaders from our global community to join us on our next topic: **Developing People in a Digital World,** to share their experiences and strategies for keeping a blended approach to training and development, as we move further into 2021, while some countries are still facing lockdown.

What I am sure our speakers will share with us, is the ability for employees to adapt and fast track any technology gaps they once had - I know we have!

ONLINE PANEL DISCUSSION - THURSDAY 11 FEBRUARY 2021

Timing

GMT

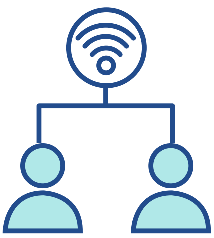
09:30 - Introduction + Welcome
09:32 - Panel Discussion
10:00 - Q+A
10:30 - End

There's still time to register
Book here

Event Link: Click here

Meeting ID: 841 8767 2311 **Passcode: 502454**

Tips for joining the online event



- We recommend you download the Zoom app. If you are unable to download the app, you can join the session from your browser – Chrome, Firefox, Safari or Edge are currently supported (but the app for Windows/Mac is a better user experience)
- Zoom can be very power hungry so make sure you have power connected.
- 5 -10 minutes prior to the session, join the Zoom virtual conference. There you will be welcomed into a virtual waiting room and the main room will open.
- Once in the main presentation room, by default, you will be muted and your video feed will be switched off.
- For the Q&A session, there will be the option to post questions or have your line unmuted to enable you to ask your questions directly to the panel. This will be explained on the day.

Guest Speakers

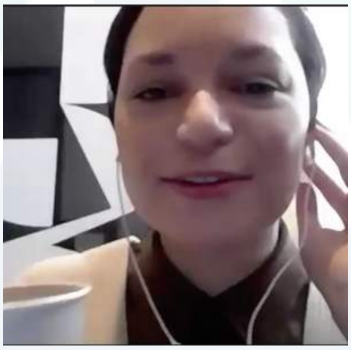
Katrina O'Malley, Global Head of Sales Enablement - Capability & Culture, QBE Insurance, Melbourne

Katrina is responsible for the consistent development of sales enablement solutions across QBE's four operating divisions, including their Global Sales Enablement Platform with world leading best practice. Since 2015, Katrina has worked across the areas of Leadership and Underwriting development including the evolution of the Underwriting Academy.

Margaret McCaig, Global Head of Professional Practices, Compliance Assurance, HSBC, Edinburgh

A Chartered Internal Auditor with 20 years' experience, Margaret is responsible for leading teams to establish strategies and methodologies that deliver operational efficiency, commercial risk management and regulatory compliance at HSBC. She has previously held leadership roles across the first, second and third lines of defence at Lloyds Banking Group and Barclays.

Tessa Boshoff, VP Human Resources, Wall Street English, Barcelona



Tessa is responsible for defining and implementing HR strategies across Wall Street English's global network of businesses. Her extensive HR background includes The Body Shop, Karen Millen Fashions Ltd, Gap Inc and Starbucks, where she developed and delivered business strategies regionally and across countries, focused on staff development, recruitment, retention, optimized productivity and organisational culture.

Alan Thompson, Head of People Capability, Customer Attuned

Alan has an in-depth knowledge of capability development including the design and delivery of interactive and engaging training solutions, making use of online, virtual and traditional classroom training methods. He has worked with several clients over the past few years to shape training solutions in areas such as sales and account management, developing customer centric strategies, and proposition development.

The Future of People Development Strategies

Alan Thompson, Head of People Capability, Customer Attuned

As the team here at Customer Attuned has engaged with our panel members for our upcoming online discussion 'Developing People in a Digital World', it was really interesting to swap stories on how the Covid19 pandemic has had a short-term impact on how we engage and develop our people; and also to exchange ideas on how we believe it will have a much longer-term impact on the future of our people development strategies too.

Throughout 2020, it's been excellent to see how many businesses have demonstrated adaptability and flexibility in their remote working practices, to deal with the challenges we have all faced in supporting our people.

What challenges have we faced in developing our people and how have we adapted?

For those responsible for designing and delivering people development activity, 2020 brought many challenges. Below are just three common challenges that have been mentioned by a number of our clients:

- Our planned existing development activity still needed to be delivered – much of this has had to be adapted for effective delivery either online or in a virtual classroom by making use of existing or new technology. This has been a learning journey for us too!

- The impact on our way of working necessitated immediate support to many of our teams who had to adapt their approaches with clients and colleagues to enable them to be effective over a virtual medium, without the fall back of face to face. As a consequence, we had to put in place practical and emotional guidance and training support.

- We have had to both recognise and take into account the practical and emotive challenges that our people have had at home in juggling work, child care, home schooling, connectivity issues, concerns over the health and wellbeing of elderly or vulnerable relatives and friends.

To enable delivery of the first two areas, we saw an initial burst of activity from many organisations and many people embraced the new technology that was making virtual training an experience far in excess of their pre-conceived ideas of what would be possible.

However, as the length of time spent home-working has lengthened, our clients have witnessed a degree of technology fatigue becoming an issue that many of us will recognise.

So not only were people spending long days connected online, they were then being asked to do their development and personal growth online too. A double edged sword.

Getting this balance right will be key if we are to continue to support and develop our people whilst they look to retain the flexibility of home-working post the pandemic.

For those designing and delivering solutions, they have had to deal with the challenge of varying levels of engagement from their delegates – sometimes due to technology or other issues, however, it can often be down to a delegate's reluctance to actively engage via the virtual medium.

As a training provider, we have certainly experienced this ourselves and the challenge of ensuring audience engagement is one that many businesses will need to address for longer term use of virtual classroom technology.

There is a perception and misconception that virtual training delivery offers significant cost savings and an ability to reduce roll out times which I would like to unpack and explore.

Whilst to a degree this is true as the monetary and travel time cost to run face to face training is almost non-existent coupled to the benefit of no real facility costs.

Let's STOP and evaluate this and apply a lens of reality as there are other areas where costs may actually be higher to ensure effective delivery in a virtual world.

To be engaging and effective, our experience has shown that smaller class sizes are crucial so the same workshop may have to be delivered more often.

Good practice delivery in a virtual class requires a delivery team of at least two. What do I mean by this? At any moment in time, one is facilitating the training content whilst the other is managing the virtual classroom (this is often done by one tutor in a F2F (classroom). Changes in presenter at regular intervals is also very valuable in helping increase audience engagement.

So, in reality, the actual savings overall could outweigh the additional facilitation and delivery costs.
However, it is important to recognise that this may not be the 'cost nirvana' our colleagues in finance may think it is!

What will be the longer-term impact on approaches to People Development strategies?

For so many of us, the last 12 months have opened our eyes to the increased capability and functionality of the virtual classroom platforms and the flexibility it offers in delivery. But businesses' will need to weigh up both the advantages and disadvantages of developing our people in the virtual world as we shape our people development strategies of the future once the pandemic has passed.

There needs to be a recognition of how people's expectations have been changed for the long term. Some individuals have really embraced and adapted to virtual working arrangements. The challenge companies face will be finding the balance of supporting flexible work practices (for those who wish to continue working in this way) and encouraging people to come back to the office.

We have to recognise some of the benefits of face-to-face training, development programmes and associated events have been lost, and almost impossible to replicate in a virtual environment – in particular the benefits of informal networking that enables people to build a support network to help their long-term career shaping. This is seldom factored into training objectives or training effectiveness measures, but since they stopped, the missing value is becoming apparent.

Taking all of this account, in our conversations with clients, the collective view is that virtual training will command a much bigger share of training and development time. However, we could see the potentially higher cost (both budget and time) face-to-face interventions being reserved and focused on highly interactive skills development, role play based, or complex training solutions that are much more difficult to replicate in a virtual environment.

In our view, virtual platforms will not only be used to replace some existing face-to-face sessions, they will be used more extensively to provide follow up engagements to reinforce learning in a cost effective and flexible way. In essence, we would expect a blend of on-line and face-to-face in pursuit of development objectives.

In summary, we envisage approaches to people development strategies will change – however in a good way that allows businesses to pick and choose the most effective approach to meet the needs of their employees and their business.

Alan Thompson, Director, Customer Attuned

Alan has an in-depth knowledge of capability development with extensive experience of designing and delivering blended training solutions for clients across several industries, making use of online, virtual and traditional classroom training methods.

Contact Alan: Alan.Thompson@CustomerAttuned.com

Joined up Voice of Customer & Staff Studies

Peter Lavers, Co-Founder & Director, Customer Attuned

In my many years as a practitioner and consultant in the field of Customer Management, I've often wondered why business' treats its Voice of Customer (VoC) and Voice of Employee (VoE) studies as completely different and dissociated exercises.

The links between customer and staff satisfaction, ease of working/doing business, and advocacy are very well established, and yet the programmes to understand and manage these are all too often divorced within the organisation.

Typically, the Market Research or Customer Experience (CX) Department will manage VoC programmes and the HR Department will run VoE and cultural assessments. Each will have specific research objectives, methodologies and key questions.

Both may be outsourced to different agencies, or one outsourced and one conducted in-house. Such studies tend to be repeated, so both have rich historical data. Rarely will they be aligned, coordinated, or even correlated however.

Why is this the case?

It's another example of silo working and business management that is not customer centric. There are good reasons for drawing on differing expertise concerning CX and corporate culture, but there's no excuse for neglecting to glean valuable insights from bringing together those findings into the bigger picture.

It is never more so as important as when it comes to trust within B2B relationships. My colleague Dr Mark Hollyoake has proved this in his seminal work on B2B trust, which established how trust works on a multi-level context on both sides of the relationship.

The research shows that the triggers and critical incidents for deepening or damaging trust are not the same (or have equal importance) across both sides of the relationship and within different levels of seniority and engagement.

B2B Trust Definition:

> "The willingness to be vulnerable to another party and the decision to engage in actions based upon an interpretation of their ability, credibility and the expectations of mutual value exchange over time."
>
> *Dr Mark Hollyoake, 2020*

One of the strengths of this definition is that it clearly works both ways. Each side is entrusting an element of the success of their business to the other.

Trust development requires an organisation-wide approach, and Mark's work has resulted in the Trust DNA™ model (illustrated), which enables the proactive and systemic nurturing (and rebuilding if required!) of trust within your B2B relationships. You can see a detailed unpacking of this model by **[clicking here.]**

This model also powers our B2B Trust Evaluator, which is more than 'just another survey'!

It is directly built upon the academic research, which confirms that a "one questionnaire fits all" approach can only skim the surface of B2B trust.

Mark's analysis developed an indexed catalogue of incidents, behaviours and attitudes that either build or impair trust. This new approach draws down the right questions to ask the different stakeholders that have been proven to matter to them.

Please get in touch if you would like to find out more about joining up VoC and VoE programmes, and evaluating and managing trust on both sides of your key relationships.

VOTED TOP 50 OF THE
TOP 100 CX STARS PROFESSIONALS

Peter Lavers, Founding Director, Customer Attuned

Peter is a co-founder of Customer Attuned and one of the world's top influencers in customer experience, CRM and customer analytics. His early career was with Rolls-Royce and Bentley Motor Cars, after which he has led hundreds of consultancy engagements across sectors around the world.

Contact Peter: Peter.Lavers@CustomerAttuned.com

LET'S GET SOCIAL ...

Join in the conversation on our social media channels

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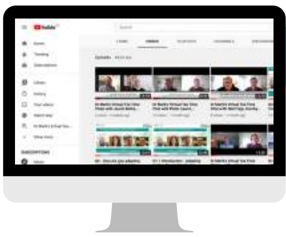
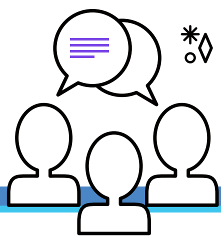
LINKED IN

Weekly blogs on customer management



YOU TUBE

*A collection of videos that include **Dr Mark Hollyoake chatting to industry experts** and catch up on previous **online conferences.***



TWITTER

Daily tweets sharing insights from the team and peers.

Follow our blog here

'More and Better for Less'

Dr. Mark Hollyoake, Founding Director, Customer Attuned

Looking back through our archives, I came across an article I wrote over fours years ago. Not only is it amazing how so much has changed, however even more surprisingly, is how even more relevant this is today.

In 2017, I tackled the subject: *An environment of uncertainty, change and low inflation, coupled with sluggish market growth, making decisions on how to deliver more value, is increasingly hard to realise.*

This still holds true today, however needs to include Brexit and the fallout from the pandemic.

When the leadership team turns to the Sales Director and asks *'I would like you to take a really hard look at the sales organisation and let me know how you are going to deliver 'better and more for less ' in the next twelve months,'* the Sales Director may be forgiven for blanching or taking a sharp intake of breath.

Coming on the back of years of downsizing, re-organisation and lean system thinking, it's often difficult to see opportunities in the market for sustainable growth.

At this point, these were the questions I was advocating back in 2017 :

As the market landscape changes, are the changes reflected in the delivery of your sales proposition and customer experience?

It's not just about being relevant to your customer needs and wants; it's about developing the capability to deliver beyond this, refining and fine tuning the sales organisation and channels accordingly, which needs to be within the overall strategy and direction of travel of the organisation.

This is still appropriate in 2021, even more so as we have seen the move to digital and virtual.

How are our customers coping with the changes? Are we seeing new customers emerging for our brands/products/solutions?

Do they need a different proposition from us? Are we up to the challenge of delivering it? Are we capable of doing it with our current systems, processes and ways of working?

This is core to going forward in 2021, some customers will have weathered the storm and may actually have benefited from market circumstances. It's the others that may be struggling, won't make the journey or have already gone. This requires agile analytics, insight and rapid action to realign the customer management team to meet and realise the new opportunities.

How are your people coping with the digital revolution and virtual working?

I have added this question to focus on your people. How are they coping with the digital revolution and virtual working? How are you helping them to increase their efficiency and effectiveness through new ways of working?

As leaders, have you changed the way you interact with your people to reflect their change in circumstances? You could build their capability and competency in the new virtual and blended customer management approach. At the same time, acknowledging, supporting and providing real clarity to empower them as they work remotely and virtually.

What's next?

As we move forward the landscape will not be the same. It is likely we will move to blended customer management approach that blends virtual, digital and face-to-face. Are you ready?

Asking these questions will help you to apply a systemic approach to your sales teams, and determine how capable it is of delivering 'more and better for less'.

Applying our **Trust Capability Builder** (**TCB** ®), enables you to take an objective view of your sales organisation. We also provide comparators of who else is doing great stuff in other sectors, and where you can develop internal capability to deliver.

We provide this in the form of a road map, including benefits case and routes to make it happen.

We help you to work more efficiently and effectively to deliver in turbulent times, taking on the changing customer landscape head-on.

Dr. Mark Hollyoake,
Co-Founding Director, Customer Attuned

Mark is a co-founder and Director of Customer Attuned. Mark is an expert in B2B Customer Experience and Customer Management. His Doctorate focused on trust as a dynamic within B2B customer relationships.

Contact Mark: Mark.Hollyoake@CustomerAttuned.com

WORKSHOP:
THE TRUST FACTOR IN LEADERSHIP
See page 12 for details

IN THE NEWS

IN THE ARCHIVES

Catch up on previous discussions in the series:
Providing Leadership in the New Normal

EPISODE 1:
PROVIDING LEADERSHIP THROUGH CHANGE AND UNCERTAINTY

EPISODE 2:
ADAPTING TO NEW NORMAL CUSTOMER BEHAVIOUR

EPISODE 3:
THE TRUST FACTOR - MAKING B2B TRUST YOUR BUSINESS DNA

NEW ASSOCIATE

Paul has over 20 years' experience in business communications, marketing and strategy enabling significant business growth primarily in the B2B sector.

Of note is Paul's work with an online reviews provider, where he created and led the team that achieved significant revenue growth, created a now prestigious accolade, and produced winning submissions for several awards.

VIDEOS

Developing your Sales Pipeline in a Digital World

Gary Lunt, Director, Customer Attuned

The pandemic has taught me two things (well, probably more ...) that I needed to address: That a digital connection, rather than personal contact, rapidly became the only way of working, and you are only as good as your broadband connection.

The rapid onset of the use of technology to manage relationships took many by surprise, and now, almost a year later, we are still learning about the most effective way to do this.

Developing people in a digital world is a hot topic. It applies to managing your own team, but also your customers that you so depend upon, but have now become a distant connection, literally, because of contact measures put in place to combat the pandemic.

Once upon a time those customer relationships could be readily measured – you met them on a regular basis, you could have great discussions, sometimes very frank and honest, and you could trust your instincts to know if they were loyal or transient.

Now that those relationships are being managed more remotely, how can you gauge the quality of them, and when it comes to managing your sales pipeline, just how easy is it to be confident about what you are being shown in those regular reports?

The rise of the use of CRM has introduced new commercial processes to (almost) automate the sales process. Most use a confidence predictor to illustrate the degree of confidence that a sales person has in striking a deal.

Historically that would have been based upon good contact with great connections. Now it is a Zoom call (other technologies are of course, available ...). And perhaps a shorter discussion because the world now wants to be managed in this way, both internally and externally.

So, is there one thing that you can do to have that little bit more confidence in the sales pipeline?

Yes, there is – and that is having a better qualified pipeline. And it is as simple as:

a) making sure that there are metrics that can be applied to each stage of your pipeline measurement.
b) knowing exactly how the customer decision making takes place – the who, when and why questions.
c) having regular, informal discussions with your internal team AND with your own connections within the customer so that you are also playing your part in the influencing process.

You might not be able to meet them just yet, but you can text, call, or video call them and stay front of mind.

Developing your Sales Pipeline in a Digital World can be done effectively.

Make sure that you are developing your people capabilities to maximise your pipeline as we start to see the route map out of the current pandemic as we may all need these insights, experiences and capabilities if this situation happens again in our lifetime.

Gary Lunt, Director, Customer Attuned

Gary has significant commercial experience gained with FMCG companies such as Diageo, Reckitt Benckiser, GSK, Unilever and Cadburys. He has also held senior positions within the healthcare sector both in the UK (AAH Pharmaceuticals) and in Germany (Celesio AG).

Contact Gary: Gary.Lunt@CustomerAttuned.com

KEY TAKEAWAYS

FOR DEVELOPING PEOPLE IN THE DIGITAL WORLD

TRUST YOUR TEAM, REMOVE THE OBSTACLES AND ALLOW THEM TO DO THEIR BEST WORK DURING A CRISIS.

THEY WILL UP-SKILL AND FEEL A SENSE OF ACCOMPLISHMENT AS A RESULT.

REWARD PARTICIPATION AND HIGH CONTRIBUTORS

GIVE PEOPLE A CHANCE TO CONTRIBUTE IN DIFFERENT WAYS - CHAT FUNCTION, ANNOTATION, SMALLER BREAK OUT GROUPS ETC

KEEP THE TOPIC OF THE DEVELOPMENT SESSIONS FOCUSED: 1 OR 2 TOPICS MAXIMUM, SO THE AUDIENCE CAN DIGEST WHAT'S BEING TAUGHT.

LEAD FROM THE FRONT. SUPPORT YOUR DEVELOPMENT EFFORTS WITH PERSONAL GESTURES TO KEEP THE TEAM CONNECTED TO EACH OTHER AND THE ORGANISATION

ENCOURAGE NETWORKING AS A TOOL TO BRING BACK WORKERS TO THE OFFICE

REDUCE TECHNOLOGY FATIGUE BY ENCOURAGING OTHER ACTIVITIES

PRAISE FROM OUR DELEGATES

"Highly interactive learning experience with some very valuable information shared with all. Detailed feedback provided by the Tutors. Thank you to the Tutors Alan and Mark."

"Great work. Loved the workshop. Usually online training feels very tiring but this one was not. Lovely breaks in between and team work was great. Thank you"

"The pace of the session was great and I think that the tutors were excellent at providing relevant feedback to all participants."

"It was a really useful and relevant session. A manageable amount of time to commit with defined 'bite size' content which built nicely on previous learning. A couple of key points of valuable feedback for me to take away and work through. The group atmosphere felt really positive, open and supportive"

"Very clear when giving examples and explaining topics. Very understanding when the participants were asking questions and expressing concerns. Fantastic virtual learning experience, something which is very different and certainly exceeded my expectations."

"The training session was really good, picked up some really good tips on improving my virtual meeting techniques. Tutors were really good."

"The best session we have had with you yet - thank you!!"

WORKSHOP:
MANAGING CUSTOMER RELATIONSHIPS IN A VIRTUAL WORLD

BY MAKING EFFECTIVE USE OF THE VIRTUAL WORLD TO MANAGE OUR BUSINESS RELATIONSHIPS, WE CAN GAIN VALUABLE COMPETITIVE ADVANTAGE.

Introduction:

With the current COVID 19 pandemic, many companies in the Financial Services sector have had to change their usual operating model to accommodate a great majority of staff working virtually – both in respect of their colleague and customer / broker / partner interactions.

Challenges:

This creates a challenge for both Sales and Account Management teams, their brokers and their customers who typically rely on face-to-face meetings – especially for sales interactions during new business and renewal discussions.

The positioning and reinforcing of company 'value add' with brokers and customers is now even more challenging in the virtual environment.

Impact on Companies:

We recognise that for many brokers and clients, the impact of the pandemic could have significant effect on the extent of their business - those with a strong on-line presence may have fared a lot better than those with a purely retail ‘bricks and mortar’ approach. Understanding the impact on each broker and client is needed to ensure genuine empathy and understanding can be applied to any commercial conversation.

This virtual training programme is highly interactive and provides guidance and support to Sales and Account Management teams as they adapt their approach when selling and managing, relationships in the virtual world.

It is tailored to reflect the specific nuances and challenges of your business to ensure a high degree of applicability and relevance to your own approach to relationship management.

Contact:
Alan.Thompson@CustomerAttuned.com

WHAT YOU WILL LEARN:

WHAT IS GOING ON –
WHY IS VIRTUAL DIFFERENT?

- The differences we need to be aware of when selling and managing relationships in a virtual world

WHAT COULD I DO TO HARNESS THE POTENTIAL OF THE VIRTUAL WORLD?

- What you need to do to sell and manage relationships effectively
- How do I sell my message effectively?

MANAGING ENGAGEMENT –
IS ANYONE THERE?

- Key 'watch-out's' and 'pitfalls' to avoid and how to counter

WHO SHOULD ATTEND?

- Account Managers
- Sales/Business Development Managers
- People who interact with key accounts at any level

Due to the highly interactive nature of this virtual training session, it is recommended for teams of 12-16.

The virtual session is delivered as two 75 minute sessions with a break of c.45 minutes in between, making it ideal for a morning or an afternoon. Alternatively, the two sessions can be delivered either side of a lunch time break.

WORKSHOP:
THE TRUST FACTOR IN LEADERSHIP

TRUST

is the buzzword of the moment in B2B, the new elixir that clinches contracts, opens doors and pushes up profits; it can be created, adapted and turned on and off like a tap, or, so we are led to believe!

This workshop adds rigour to the investigation. While similarities exist in the way B2C and B2B operate, there are also significant differences; in B2B the issue of trust is less straightforward, its applications are often more nuanced and have greater impact on client relationships.

Few studies have been made into the dynamic nature of trust within B2B relationships, or the interrelatedness of trust:

- How is it created (interdependence)?
- What are the benefits that flow from this relationship (mutual value)?

Trust in a B2B context starts through the tactical and strategic intentions derived through the board and the leadership team. They set the tone and direction to the rest of the organisation, its customers and suppliers.

If the board and leadership team don’t know how it works then how can you pro-actively develop and apply it?

What we offer:

Through an interactive on-line, face to face or blended session we explore and develop the trust factor with your board and leadership team. You chose the medium that works for you.

We start by establishing what trust actually means in a B2B context and how it can be proactively applied.

Once this is established the role of the board and leadership team is explored to develop the trust factor.

What you get:

Each member of the board and leadership team will leave the session with an understanding of their role in leading and developing the trust factor.

This will be through the application of the trust DNA developed into a blueprint. The trust DNA blueprint will cover each level of the organisation, key customers and stakeholders.

You have the ability to check progress through the application of the trust evaluator.

Contact: Mark.Hollyoake@CustomerAttuned.com

See you on Thursday 11th February 2021

Dr. Mark Hollyoake
Co-Founder & Director

Alan Thompson
Director

Peter Lavers
Co-Founder & Director

Gary Lunt
Director

Ellie Luk -
Marketing Director

Paul Cranston
Associate

Chris Hudd
Associate

Calum Byers
Executive Coach &
Senior Associate

About Customer Attuned

Business success today is dependent upon how well staff, systems and customers are managed. When they work together they positively impact the P&L.

To improve performance, increase sales and deliver a superior customer experience, you need to have the right business capabilities, staff competencies and customer management techniques in place.

- Improve the quality of your customer relationships
- Grow your share of value within existing customers
- Improve organisational and channel efficiency
- Gain new customers and turn them into profitable relationships
- Keep and develop your people to deliver your customer promise

We help you to identify what's failing and develop tools and skills to deliver the experience that your customers want and need.

CO-CREATING TRUST-BASED B2B RELATIONSHIPS FOR MUTUAL VALUE

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