

PROVIDING LEADERSHIP IN THE NEW NORMAL

# DEVELOPING PEOPLE IN A DIGITAL WORLD

ONLINE PANEL DISCUSSION SUMMARY - 11 FEBRUARY 2021



Presented by  
**CUSTOMER ATTUNED LTD**



# Developing People In A Digital World

## Alan Thompson, Head of People Capabilities, Customer Attuned

"There is no doubt that the future of people development strategies will be impacted by the forced changes companies have had to adopt to retain a focus on capability development over the past 12 months.

Flexibility will be key to ensure the most effective blended solutions are available to meet the needs of businesses and their employees."



Alan Thompson

As we continue our ongoing series of online panel discussions on **Providing Leadership in the New Normal**, we were delighted to host our first event of 2021 looking at the topic of **Developing People in a Digital World**.

We extend our thanks to our outstanding panellists who gave up their time to share their experiences and insights gleaned from what has been a challenging 12 months for all those involved in leading or supporting people development activity.



KATRINA O'MALLEY

QBE INSURANCE



MARGARET MCCAIG

HSBC



TESSA BOSHOFF

WALL STREET ENGLISH

In this summary, we recap on the key areas discussed by our panellists, namely:

- Firstly, on how they have managed their people strategies during the lockdowns most markets have experienced to some degree or another over the past year;
- Secondly, the key challenges they have faced and the lessons learnt; and
- Thirdly how they see the changes they have had to adopt, impacting and shaping their future people development strategies.



### Watch the panel discussion again.

We've edited the questions from the panel discussion into separate videos, so you can choose to watch them in order or simply watch the questions you're interested in the most.



CLICK TO WATCH



## How have you managed to continue to develop your people during lockdown over the past year?

**HSBC** is a truly global banking and financial services organisation with c. 40 million customers, over 200,000 employees and operates in over 60 countries.

**Margaret McCaig** leads the Global Governance & Standards team in Regulatory Compliance. One of her key roles is the provision of training and development support for the global assurance teams. In 2020, there was a major roll out planned of new systems and standards for the global teams which initially included a series of face-to-face training sessions in key global locations.

As a result of the C19 pandemic, these sessions had to be quickly transformed for virtual delivery via Zoom. More facilitators needed to be drafted in and up-skilled in delivering virtual training sessions to support the delivery of 42 sessions to over 400 staff globally. To supplement the virtual sessions, they also held a series of short 'spotlight' sessions which were run monthly and recorded shortened video versions to support new joiners and returners.

Margaret also focussed on the specific needs of her own team's development by including deep dive development discussions and regular check-ins to ensure focus and pace is maintained with skills and knowledge development in this increasingly digital age.

**QBE** is a general insurance and reinsurance company, headquartered in Sydney Australia, with four Regional operations in Australia, Europe, North America and Asia, offering commercial, personal and specialty products and risk management solutions to their customers. They employ more than 11,700 people in 27 countries.

**Katrina O'Malley** is the Global Head of Global Sales Enablement with a primary focus on providing tools, processes, and capability solutions so market facing teams can be confident in delivering for their customers and partners.

The last 12 months have been challenging for QBE as each region has moved in and out of restrictions at different times. But ultimately, all people development has been virtual since March of last year. There was very early recognition that not only was support needed to help individuals to work in a virtual way themselves, but support was also needed to help them engage with their customers and brokers in a virtual world.

One of the first areas identified as needing support, was on 'Managing Negotiations and Difficult Conversations' with a particular focus on the challenge of doing this in a virtual way. Katrina led the development of a solution and then managed the delivery of more than 35 sessions globally - all within a short few months window. This was a crash course in Zoom for both facilitators and delegates.

Other training that already existed had to be adapted, e.g. a two day face-to-face sales development solution had to be broken down into 10 x 90 minute sessions, designed to hang together over a virtual campaign.

**Wall Street English** (WSE) has over 170,000 students currently studying English with them globally. They have over 400 learning centres globally in 29 territories.

**Tessa Boshoff** is the Vice President of HR and part of that role includes a responsibility to contribute towards ensuring the right environment and conditions is provided to their teams to develop and grow. As a predominantly franchised organisation, there is a dedicated training team who are responsible for designing and implementing training solutions that meet the needs of the franchise network.

Their teaching method includes a multi-media component but engagement between students and teachers would primarily happen in the local learning centre. In addition, all social clubs, where students would come to practice their English, would be in Centre, which is the heart of the Student Experience. When the pandemic hit, as a consequence, almost all of the Centres closed around the globe.

WSE had to quickly reassess their core proposition and develop an offering that would meet this new situation. They developed an online offer, using functionality they had been testing the year before, to develop the option for their students to learn in-centre OR learn on-line OR a combination of both. This of course, had to be trained in to the network. Instructor led Virtual Training Sessions played an important part in enabling territories to sell on-line and service on-line, during these turbulent times.

### **What have been the biggest challenges you have faced and lessons learnt over the past 9-12 months?**

Our panellists shared a number of common challenges, with Margaret initially highlighting the importance of really understanding how people are feeling and ensuring the well-being of your people through these difficult times.

Both Katrina and Margaret discussed the impact of potential technology fatigue - not only were people spending long days connected online, there was a lot of early encouragement of social interaction online, *"we were then asking them to do their development and personal growth online too. This led to a lot of technology fatigue and low energy at stages."* This has been a lesson learned and one that has led to adaptation and flexible approaches.

Other challenges shared were those of passive engagement from training attendees and ensuring sustained energy and commitment - particularly on longer term development programmes where delegates were having to re-engage on an ongoing basis. Again, a lesson learned and an effective change in approach to areas such as timings of delivery, length of gaps between sessions, and the structure of activity either side of the virtual sessions to support the learning.

Tessa reiterated that for them it was a case of adapt to survive. With a business model rooted in an off-line Centre based service model, WSE had to find a way to take 120,000 students from studying in Centre, to studying on-line successfully, very quickly. But this was also done with an eye to the future. Their teams worked cross functionally to develop and

deploy a solution that would not stop at ensuring our survival, it's a solution that offers many possibilities for the future too.

### **Looking forward to when lockdown restrictions eventually ease, what do you think your approach to people capability programmes will be?**

Tessa is confident that the lessons learned and the agility developed will serve WSE well as they look to scale their business. They expect more use of a blended solution via Instructor-led, virtual training as well as a strengthened capability through their new LMS system, to ensure they can up-skill and develop at scale.

Margaret echoed this message by stating that she fully expects HSBC to continue to operate a 'blended' model to training with a mix of face-to-face and online/technology enabled sessions.

Both also highlighted that for them there will always be a place for face-to-face training - not only as an effective medium to deliver certain types of training but also because it's where some of the most important connections are made.



## Alan summarises the future of virtual training:

I want to take the opportunity to summarise some of the key messages from the panel and how these have resonated with our own experience of working on capability development programmes with a number of clients over the past year. I'll split this into two parts – firstly looking back over the past 12 months and then secondly, looking forward to the longer-term impacts on People Development strategies.

### Looking back at the experiences shared by our panellists, the overarching theme of the past 12 months has been one of adaptability:

- Adaptability of existing plans and content for delivery in a virtual world. e.g. businesses have core training that still had to be delivered such as regulatory and compliance training
- Adapting to the new way of working and the support that was required to help our teams and clients engage effectively in a virtual world. E.g. sales and renewal negotiations that typically took place face-to-face have been conducted virtually – new training support required to help teams do this effectively.
- Adapting for survival. Businesses such as WSE that were centred around a face-to-face offering have had to adapt quickly to continue to have an offering that resonates with their customers.

**Underpinning this, has been the need to recognise the practical and emotive challenges that teams were facing at home in juggling work, child care, home schooling, connectivity issues, etc – so again, adaptability and flexibility in solutions are essential.**

### Looking forward, what does the future hold for People Development Strategies and how will they will be influenced by learnings from the past 12 months?

- Flexibility in future design and delivery will be key. Learning programmes will need to reflect changing employee work practices – we have already seen a number of companies publicly announce a change to their flexible work practices post Covid – and therefore capability programmes need to match this flexibility.
- The power of connections and networking is rarely added as a core objective or a core measure of success of development programmes but one which is invaluable. There will therefore always be a place for face-to-face events and training and the hook of networking opportunities may be what's needed to encourage employees back to the office.

**We were also very grateful to all those who submitted questions to the panel which our panellists answered with aplomb and additional insights.**



### PRAISE FROM THE AUDIENCE

Great session - really insightful and really enjoyed hearing from expert panellists and excellently facilitated by Alan. Thanks!

Thank you, very interesting overview and real experiences

Thanks for your insight panellists, fascinating stuff. Really enjoyed it. Thanks Alan & team

Great session. Thank you so much to everyone involved. My feedback would be that it was highly engaging and the Q&A session was maybe the most valuable Q&A session I've experienced in training so far.

Thanks! Well-structured and informative session.

Many thanks... very insightful. Will be interesting to have a review in 6-12 months!

Thank you for organising yet another amazing session with some great panellists.

## Who we are



Dr. Mark Hollyoake  
Co-Founder & Director



Alan Thompson  
Director



Peter Lavers  
Co-Founder & Director



Gary Lunt  
Director



Ellie Luk -  
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Paul Cranston  
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## 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



CO-CREATING TRUST-BASED B2B RELATIONSHIPS FOR MUTUAL VALUE

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



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