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PROVIDING LEADERSHIP IN THE NEW NORMAL

THE IMPACT OF HYBRID WORKING ON HOW WE BUILD AND MANAGE CUSTOMER RELATIONSHIPS

ONLINE PANEL DISCUSSION SUMMARY - 30 NOVEMBER 2021

Presented by

CUSTOMER ATTUNED LTD

Customer Attuned

The impact of hybrid working on how we build and manage customer relationships

Alan Thompson, Head of People Capabilities, Customer Attuned

"Hybrid working has levelled the playing field.

Everyone is impressed by a swanky office, but take that away and it's all about the content rather than the venue.

With the distractions taken away we were able to focus on the customer needs.

This became our advantage."

Chris Withers
Ecclesiastical

As many UK industries continue to manage the challenges of hosting in-person events, we were delighted to continue with our ongoing series of online panel events on Providing Leadership in the New Normal.

For this seventh event in the series, we extend our sincere thanks to our outstanding panellists who gave up their time to share their experiences, insights and views on how hybrid working will continue to impact how we manage and build trust based customer relationships in the coming years:

ASSOCIATE PROFESSOR
KINGSTON UNIVERSITY

REGIONAL DIRECTOR
OKTA

BROKER DISTRIBUTION DIRECTOR
ECCELESIASTICAL

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

- What implications from hybrid working are they seeing in their organisations - firstly on approaches to managing their existing relationships; and secondly, the impact on building new relationships and selling to new clients
- Any differences they are seeing between virtual and face-to-face interactions in how their teams are selling their message and getting buy in – e.g. any challenges, advantages, adaptability needed, etc.
- Finally, any short-term and longer-term benefits they are seeing / expect to see in how they manage relationships going forward

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.

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Q1 What implications from hybrid working are you seeing in your organisations:

- firstly, on approaches to managing your existing relationships?

- secondly, what impact is it having on building new relationships and selling to new clients?

Chris firstly shared some context, *"We have trading relationships in place with most of the brokers in the UK but many of them have limited reasons to engage with the business."* He went on to explain that pre-pandemic, the account management team would inevitably interact more frequently with those brokers who operate in their specialist areas and where the business either has a number of existing policyholders or a strong pipeline of new opportunities.

Many of these relationships were traditionally managed in a face-to-face way, and there was limited scope to reach those brokers who weren't so engaged or where the potential was harder to identify. As Chris said, ***"Why would someone drive 2 ½ hours on the off chance of uncovering a gem when they had a healthy pipeline of opportunities already?"***

However, hybrid working has meant his team could maintain their existing relationships via virtual interactions and subsequently utilise the reduced travel time to try a bit harder on the less developed relationships. With video conferencing becoming more widely acceptable as a means of engaging, developing rapport has become easier with those brokers who may historically only have been dealt with on the phone.

This has created a lot of additional business opportunities that may have not been uncovered before.

Justin reminded us that as a consequence of the pandemic, across the whole of the region he manages, there was no choice for either customers or **Okta** to pivot from face-to-face to virtual relationships. In many ways, this helped to manage expectations of how his team would engage and there has certainly been no brake on business growth as they have added 2,500 new customers in Q2 of this year.

How these customers came on board changed, as **Justin** said, *"A very high proportion of these customers we have never met in person, either during the initial buying stage or subsequently as we build the relationships further – who would have thought that would be the norm 2-3 years ago?"* Some of the key considerations that Justin mentioned that have supported and enabled **this successful growth has included a real focus on building trust through authenticity** - to support this trust building, there has been time spent to ensure precise data gathering to ensure the best solution for clients.

Linked to this, whilst the world of virtual encourages everything to be done faster, there is a need at times to slow the process down to ensure things aren't slipping through the cracks. One final point **Justin** made in support of effective rapport and trust building was, *"it is crucial that in virtual meetings we show up and remain present throughout and not allow ourselves to be distracted – you wouldn't use your mobile phone to deal with a WhatsApp message in a face- to- face meeting so why would you consider that is acceptable when in a virtual meeting?"*

Kate shared a slightly different perspective from her role where she has responsibility for engaging with both students and external industry clients. Managing engagement with students proved very time consuming as there was a lot of chasing to be done - but **conversely engaging with existing industry clients who the university work with on student projects became a lot easier.**

They benefited from more regular shorter online meetings which enabled projects to be monitored more closely. But expectations changed too as clients came to expect online meetings to take place almost instantly, and if this wasn't delivered, relationships could be lost.

In terms of the impact on building new client relationships, **Kate** did say that this is in some ways easier for her as she is offering a service to clients where they get a project delivered for free rather than her having to sell something. All they have to give is a bit of their time and these time requirements could be managed far more flexibly in a virtual environment.

Q2 Thinking specifically about how you sell your message and get buy-in. What differences are you seeing in how your teams are selling their message between virtual and face-to-face interactions?

Justin reiterated the importance of slowing things down to ensure proper understanding and preparation ahead of any engagement. He also stressed the importance of his teams planning their day effectively, *"don't be tempted to book back-to-back Teams/Zoom calls or else you are giving yourself no thinking or reflecting time – either immediately ahead or post a meeting."*

This was done as a matter of course when travelling was involved and is an important part of selling your message and then following up effectively. From his perspective, telling a clear and concise story in a virtual world is even more important than when face-to-face. Online meetings have become more business focussed

and so it is important that his teams are ready to lead outcome-based discussions and mutual delivery plans.

Kate also recognised the importance of trying to manage clear diary space to allow the thinking and reflecting Justin mentioned – her challenge has been making sure others respect these boundaries too. Colleagues and students especially, see a clear space in the diary (or indeed, blocked out time) and still will attempt to call and expect an answer.

Building on a point made earlier, **Kate** mentioned that in academia, online interactions are acceptable as they are not selling a product, but are offering a benefit to the organisation. So, selling our message in an online environment is not a new concept.

Chris reflected on the fact that there is an intensity to video calls that mean we can achieve more in less time. It has in many ways become easier to have more specific and detailed conversations because there are fewer distractions and meetings get to the point far more quickly.

"Virtual is a bit more functional and we benefited from being able to share screens and look at the same data together. We found that you really had their full attention, instead of them hiding behind a printed out brochure."

Chris echoed the point made by Justin that the reason for the meeting needs to be absolutely clear and preparation time is critical as the team have to hit the ground running in the meeting. The virtual meeting format means that the focus is on the content, the opportunity, the customers' needs and that has been beneficial for all parties.

Since restrictions have been lifted **Chris** and his team have worked hard to re-engage on a face-to-face basis.

"We think the variety is essential for the benefit of the long-term relationship and it'll be important to strike the right balance as the face- to- face call impairs productivity but enriches the functional video calls. A blend of both will be essential."

Q3 Finally, can we explore the benefits of this new way of hybrid working on how you manage your relationships. What short-term benefits are you seeing now in your relationship management and also, thinking ahead to the next 2 to 3 years and beyond, what long-term benefits do you think hybrid working will have for your teams and the business as they engage with customers and partners?

Chris stressed a point he made earlier regarding their ability to broaden their engagement. This has been on two levels – firstly extending their reach and engagement across the panel of broker companies they deal with; and also within each company, they have taken the opportunity to deepen their relationships by increasing the number of people they engage with across the business. This has given them the benefit of being able to share more insight more often and this has resulted in a better understanding of how this can help brokers and their clients.

Chris mentioned another benefit too, *"As a business, our ethical position is at the heart of our proposition, so the reduction in travel time makes the business more efficient and it will improve our carbon footprint too."* He went on to say that *"It's also very easy to say that there is a wellbeing benefit but whilst the meetings are sometimes shorter, the intensity can still be draining.Time management is critical and giving yourself time to plan and prepare as well as follow up the calls is easier to say than to do."*

Chris made a final point re the importance of avoiding an end game that has a default of people back in offices, as their data shows the business was just as productive during lockdown if not more so.

Kate also was of the view that the virtual world can make it more difficult to have a work life balance as it is harder to turn off. It is well and good saving the travel time, but having personal time is key and not to be available at all hours. So yes, the short-term benefits should be that people can get more work done as they are not travelling and can have a work life balance. But in many cases, this has had the opposite effect as people are expected to be on call and available 24/7.

Thinking ahead, the longer-term benefits for **Kate** are that more meetings can take place with multiple people in multiple locations. And these meetings can be shorter and more focussed. For engagement with external clients, she is seeing some real benefits. For example, it has opened up opportunities with people who are higher up in organisations, as people don't have to travel or block hours in the diary.

"I am able to take 10 minutes out of a CEO's day to offer a free service and all they need to do is block a 10-minute slot. This has resulted in large increase in external client engagement with the University. This in turn has also opened up opportunities for students and graduate training roles."

In a final quick response to this question, **Justin** started by making the point that, "We have to remember that work is something we do, not somewhere we go." One benefit he is seeing includes access to a truly diverse talent pool as employer and employees embrace dynamic working arrangements that can suit personal agenda more.

This can only bring benefits to customers and the business as they can recruit the best people. But, as a word of caution, remote working can be impersonal, it can for some be lonely, so it is important as leaders that we ensure people are getting the check-ins and engagements they need and provide opportunities for personal meet ups.

Getting the best out of hybrid working

Use online to your advantage, travelling time has been removed, so now you have access to people who might have not had the time to travel to you.

Block out time in your diary for no meetings and use this time to make notes, follow up and plan ahead for the next meeting.

The sales process has sped up, customers have already 'qualified you in', slow it down and get the data right.

Turn off What's app (or similar apps) and give your full attention to the person. You wouldn't answer a message in their board room, so don't do it on a zoom call.

Access to CEO's is now much easier, booking them for a 10 minute call is now a reality.

Hybrid working has levelled the playing field, impressing customers with swanky offices is no longer an advantage - focus on engaging content and on the customers needs.

Establish boundaries where neither peers or customers can contact you. You don't have to be avaialble 24/7.

Make sure you understand the outcomes that the customer needs.

Set clear objectives for what you're going to talk about and the outcomes you need to achieve.

Promises matter more in a virtual environment. They need to become commitments that are delivered against.

The talent pool has widened, applicants can apply for jobs regardless of their proximity to the office.

QUESTIONS FROM THE AUDIENCE

How can businesses best manage knowledge share and decision making effectively, whilst working in a hybrid environment, to ensure a consistent customer experience where our customer's trust in us is maintained?

What's been your approach to managing new starters to help them prepare for managing new relationships – training, side by side support, etc.?

How are you keeping your teams up to date with the information they need to enable them to work effectively in a virtual environment? Linked to this, how do we avoid information overload?

Who we are

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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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