

LEADERSHIP TRAINING AS COMPETITIVE ADVANTAGE IN A WORK-FROM-HOME ENVIRONMENT

Managing the customer experience during the pandemic has brought a host of changes to daily operations, not the least of which is training managers to both work and manage remotely. This paper explores three keys to training success.

1 TRAIN MANAGERS TO PRACTICE PSYCHOLOGICAL SAFETY

When managers know how and when to enable agents to engage in moderate risk-taking behaviors, they play a significant role in transforming their agents into high-performing teams.

Examples might include:

- Having the confidence to go “off script” to best serve a customer
- Reaching out for help without fear of supervisor reprisal
- Speaking up when there’s a problem

Teams who know it’s safe to take interpersonal risks as a group see increases in performance, engagement and retention.

The curriculum for training managers to create psychologically safe teams might include segments on how to:

- **Demonstrate engagement:** Pay attention when team members are speaking. Be present during meetings. Practice active listening.
- **Build self-awareness:** By understanding their own strengths, weaknesses and hidden biases, leaders earn team members’ trust and strengthen their credibility.
- **Receive feedback graciously:** While managers are ultimately responsible for decision-making, asking the team for input or feedback exhibits flexibility and openness. This is critical, especially when there’s crucial information to share.



2021 Q1 - This Quarterly CX Insights white paper series reviews the people, processes and technology driving the tools and authority that enable front-line agents to exceed expectations during customer experience moments of truth.

Morley Example 1:

Striving for excellence

Tasked with providing white-glove assistance for a high-priority client initiative, we needed to quickly identify associates for the project, determine SMEs, staff extended hours, establish an escalation structure and schedule same-day training. Given the short time frame and somewhat limited information, managers empowered agents to go off script, encouraging them to find ways to say “Yes!” to our customers and to reach out to leadership with complex scenarios that required creative solutions, such as Lyft, Uber or other innovative thinking.

The results were incredibly encouraging. Our customer satisfaction came in at 66.7% Top 2 box, compared to similar initiatives that have seen a 47% satisfaction rate.

Morley Example 2:

Engaging new hires at every turn

Pre-COVID-19, we began building psychological safety with new hires on day one during orientation by embedding belonging cues into the curriculum design. This continues in our new distributed environment, where we:

- Invite trainers to orientation to describe what agents can expect during the next round of training.
- Host Zoom breakout rooms where we personally welcome agents and make them feel special.
- Arm team leaders with digital tools for video conversations designed to demonstrate engagement and build trust.
 - TLs personalize these experiences by discussing family, shared interests and mutual beliefs. (Contrast this proactive approach with a reactive “I’m available to chat if you have any questions” approach.)
 - TLs greet new hires creatively with welcome calls, questionnaires and get-to-know-you slideshows, all the while emphasizing inclusion, impact and support.
- Promote team bonding by communicating with blended teams as though the entire team is virtual. No one feels left out due to proximity.
- Conduct regular check-ins, set a consistent meeting cadence, and train TLs to prepare before each interaction so their focus is clearly placed on the agent. This builds trust and ensures their time together is well spent.

2 COACH MANAGERS ON EMERGING TECHNOLOGIES & COMMUNICATION CHANNELS

Managing and motivating today’s remote associates requires leaders to broaden their technological horizons in order to best coach and mentor their teams. When successful, a tangential consequence is that team members interact and communicate more effectively as well.

The curriculum for training managers to use nontraditional tools might include segments on how to:

- **Facilitate frequent and seamless communication:** Tech tools built with collaboration in mind help teams freely communicate with each other in real time (no delays) regardless of where they’re working.
- **Use gamification:** People are naturally competitive. Creating fun, measurable ways to perform day-to-day activities can increase engagement, performance and team unity.
- **Engage socially:** Social interactions during the workday help to strengthen relationships, both manager to peer and peer to peer.



Morley Example 1:

Communicating effectively and often

“There’s no such thing as over-communicating.” We believe this strongly and have trained our leaders to dig deeper into the digital tool bag. They’re learning to optimize the capabilities of tools like Microsoft Teams, Zoom, Skype and other platforms to enhance engagement and learning. They’re becoming pros at functionality like screen sharing, commenting, hand-raising, creating breakout rooms, chatting and posting reactions.

- **Consistent communication increases critical metric:** Managers check in with their teams daily via multiple touchpoints on critical metrics to not only drive discussion but also ensure alignment and accountability. This engagement has led to an increased critical callback metric of 20+% in two months.
- **Listening leads to increased retention:** We invited remote associates who needed more hands-on training on site for additional personalized – yet socially distanced – help. Offering this flexible, customized work environment led to the direct retention of several T2 associates who may have otherwise left the company.

Morley Example 2:

Making work fun

Mastering the new digital tool box leads to more effective remote coaching techniques, such as establishing a chat room for daily trivia contests based on best practices. We’ve trained leaders to also sprinkle in personal questions about teammates to keep things fun and strengthen social bonds within teams.

Morley Example 3:

Taking time for a personal touch

Team Lead Ashleigh Phillips sent each of her team members a mouse pad showing a photo of her with a dramatically sad face. The corresponding message noted how much she misses seeing her team in person. The result was terrific, and the team sent back a series of selfies holding up the mouse pad and expressing how much they miss their beloved TL.

In this case, a new communication channel and an empathetic approach that encourages psychological safety resulted in a stronger bond across the team. We are working this example into leadership training to encourage TLs to embrace and replicate simple, innovative approaches such as this, thus producing another type of psychological safety among our TL team ... a virtuous cycle.



3

GUIDE MANAGERS ON IMPLEMENTING PROCESS CHANGES

When it comes to process changes, the remote work environment is the gift that keeps on giving. Many traditional in-person activities have gone digital/remote. Talent acquisition, onboarding, orientation, initial training and just about every aspect of job performance have changed.

The curriculum for training managers to help launch and enforce process changes might include segments on how to:

- **Listen:** Monitor the progress while the change is occurring, ask for feedback and bring concerns (and alternate ideas!) to leadership’s attention.
- **Lead by example:** When managers do a good job of this, their teams show more commitment to achieve organizational goals. It becomes about “we” instead of about “me.” Leaders who lead by example position themselves as credible, responsible and worthy of following.
- **Emphasize the benefits (WIIFM):** Create a sense of enthusiasm toward changes by highlighting specific positive outcomes when everyone pulls together.

Morley Example 1: Going paperless

Paperless processes are now highly preferred, so the inertia of past paper-laden practices is gone. Leaders throughout our organization are learning to perform without paper, e.g., using fully digital job applications, leveraging electronic signature software, using note-taking apps and more. Benefits and results we've seen include a faster time to hire for some roles, increased associate data integrity (especially with regard to our new human capital management system), and a decrease in our environmental impact.

By training our managers to adopt and embrace our new paperless processes, we've found efficiency gains. However, even more exciting is that as our managers bring these processes to their teams, associates are bubbling up with corresponding opportunities for more positive cultural change.

Morley Example 2: Separating work life from home life

Someone once said, "No one on his deathbed ever said, 'I wish I had spent more time at the office.'" Well ... now that associates are working from home, they are, in effect, spending more time at the office. We're training our managers to encourage team members to take care of themselves in this new "always at work" world.

Through microlearning opportunities on our Workday LMS and other resources posted to our intranet, we're encouraging leaders to learn about and promote self-care and well-being techniques to help people adjust to this new work-from-home reality. Recent topics have included creating a meaningful morning routine, setting up your workspace, taking time to move during the day, having healthy snacks on hand and sticking to a sleep schedule.



SUMMARY

The remote work environment has opened up a world of changes affecting organizations' people, processes and technology. By training managers on how to manage and work remotely, we can open a path for success in this new era of employment. To realize these benefits, our managers must be trained to embrace these changes themselves and pass them on to their teams in ways that create psychological safety, use the best tools for the job and ensure they're informed on new processes that can help them personally and professionally. When this happens, it's a clear indication that leadership training can greatly accelerate agent engagement rates and provide a competitive advantage for enterprises willing to make the investment.

Sources:

- [The 3 pillars to managing a healthy customer service team in 2021](#)
- [8 ways to create psychological safety in the workplace](#)
- [The importance of self-awareness in leadership](#)
- [7 ways in which technology is reshaping employee engagement](#)
- [How to introduce change in the workplace](#)

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