

Coaching in customer facing environments A personal reflection

*“Remember to thank
the little people – for the
years they slowed you down”*

In his tales of “the wise fool’ Peter Hawkinsⁱ describes a management team asking Nasrudin if he could help them prepare a better communication policy for their staff. “Certainly”, said Nasrudin, “only first tell me what it is you are not hearing?”ⁱ

In a very different book Gordon Corrigan reports that 91 British Generals were killed in action between 1914 and 1918, and a further 146 were wounded or captured, a higher proportion of casualties than other ranksⁱⁱ. So contrary to the perception relayed by Alan Clarke and Blackadder that the ‘donkeys’ remained in Chateaux whilst their troops were slaughtered it would appear that a good number must have been in the front line.

This may seem an odd way to start reflecting about the coaching of those leading colleagues in a customer sensitive environment. Yet we read that during their ‘grey period’ the staff working in Marks & Spencer knew that customers were not attracted to their merchandise long before the management. They knew their children, husbands, friend and relatives were not shopping in the stores, and they saw that customers were not buying. Similarly when British Airways operations collapsed in chaos as it’s outsourced caterer went on strike it was three days later before the airline announced that “senior management were now in the Terminal to deal with the passengers”, implying that they were not there before. So the leaders of two major companies whose fortunes are dictated by their ability to attract and retain customers might be accused of “not hearing” and of not “being there”.

So what might the implications be for a coach working with managers in such environments?

A first line of enquiry might be to ask what questions the client is asking of their subordinates and peers?

These are not new perceptions of leadership needs. Ron Heifetz summarised many of them in the mid 1990’sⁱⁱⁱ. In his view good leaders seized every opportunity to ask staff questions. Hence Colin Marshall learned how difficult it was to clean the first class section of aircraft because of the curse of escaped peanuts, how passengers noticed these, and how the staff knew how to deal with it if only their managers would give them the different nozzle on the vacuum cleaner which some had already bought in the high street. Heifetz also captured

the thought that good leaders were not afraid to describe reality. So more recently Justin King agreed with his Sainsbury staff that the goods were not on the shelves and this had to be fixed. He did not continue to reassure them that the new IT based system would eventually work. He understood that the goods were not on the shelf and actually put them there using current systems and immediately.

This thinking has been continued by Clayton Christensen^{iv} who argues that successful innovation and growth requires systemic investment in customer R&D; and developed by Selden & MacMillan who say it is essential for frontline employees to be involved in such a process^v. In other words the coach may consider working with the client to make sure they are close to the staff who are close to the customers and that they personally are engaged with them.

So in the same way that the coach is always faced with the question as to whether they are really present with the client? Are they really listening? Are they really seeking to understand the client's mindsets? So the coach might work with the manager to explore that they are really 'there' with their colleagues, not just managing by 'walking about' but genuinely questioning because they want to learn.^{vi}

A second line of approach for the coach might explore how the client is learning, and whether they are engaging multiple mindsets and multiple intelligences to maximise this?

Front-line staff it is argued know how customers are actually feeling and behaving. So if the managers were only there too, and saw the situation, and asked questions might they not understand too? This does not mean that metrics are not also useful. One of Alan Leighton's first actions at Royal Mail was to ensure that he and his managers know sales and operations results within a few days, not a few weeks. In addition, he also asks the staff what they see as happening, and in just one example this resulted in the inadequate plastic shoes issued to postmen being changed. It takes Leighton time to read 50 or 60 E mails a day from staff but he argues that it is worth it.

Similarly in his rejuvenation of the massive US Home Depot chain Robert Nardelli blended the management process approaches from his GE background (e.g. data templates and strategic planning) with the passion for customers instilled by the previous management through learning forums, conference calls, and simply visiting the stores^{vii}.

It took time for a First World War general to frequently slog his way to the front line and see that the shells were misfiring, or that the soldiers had no gas masks – and for many of them this journey also cost them their lives - but it may also explain why systemic failures were fixed, and why so many people actually followed their lead in frightful conditions. The conditions are not so murderous for most current managers but one of the attributes of coaching is that the sense of space and time created may be used to consider whether the client does spend

enough time if the real front-line in which they lead people – rather than the managerial front line of committees, budgets and administration that may become all-consuming.

A third possible line of inquiry by the coach might be to question the external (or 'worldly' mindset of the client?

A point of vulnerability for any organisation in this competitive age is that even front-line staff may not understand the trend they are experiencing. British Airways staff started taking trips on Ryanair very quickly when they realised that the fares to Venice were cheaper than 'discounted staff rates' on their own airline, but they did not see the competitive threat to their own positions implied in this.

NHS staff may have spotted that Netcare and Ramsay Healthcare have entered the private hospital market, but they may not have realised that these operations now substantially reduce the cost of hospital provision for national health patients for the government. As these outsourced providers grow their efficiencies may increase and the public service argument moves from being about who is the provider to recognising that the public purse and patient may be better served.

Leaders and managers need to constantly make sense of these 'competitive disruptions' and make them real for their staff. The organisation needs to hear them, and talking about them is neither irrelevant nor disloyal. A conversation whereby the coach questions the client about any signs of competitive developments – as they have gained insight from their colleagues and subordinates – and in turn explores the significance of any emerging patterns with the client may assist the client's learning.

These three possible lines of enquiry illustrate that one role for a coach working in a customer facing organisation may be to ensure that they contract to inquire and challenge within this specific context.

Leadership in context means making sense of the organisational purpose and story, listening to the insight gained from those making the customer transactions, and being there with them. This may require the coach to work with a greater degree of granularity than with other clients, and to keep working across the individual and organisational unit boundaries. Even in apparently simple customer transactions daily choices determine the perception of the service by the customer. Does a teller in a busy bank take the time and trouble to process a cheque when no prior arrangement has been made and there is a queue? Do staff in a hospital ward check that a patient not only has food but is eating it? It is the sum of such small choices that define the customer perception of an organisation. There is no 'right' answer so staff look to the local leader to provide guidance.

Such an approach might also lead to the coach exploring the importance of non-compliance with the client. Most customer facing organisations have clear procedures and an expectation of compliance based upon the protection of brand values, consistent service levels to meet user expectations, and the efficient use of resources. Great customer facing organisations often empower their people to exercise judgement and on occasions not comply.

For the manager this may include improving their ability to look at such non-compliance from multiple perspectives. Also how they might encourage more such ‘rule-breaking’ but still preserve core values and sustainable user expectations. For example, nursing staff might on occasion waive the ‘visiting hours’ rules in a busy hospital because of distress this would cause to a patient despite a recent missive to enforce the rules so that in general patients can rest. Or check-in staff might move other ‘higher net worth’ airline passengers from pre-booked seats so a family may sit together despite the family having clearly purchased low fare tickets with no advanced seat allocation priority. Here the leaders need to recognise the validity of the earlier decision yet demonstrate that in this particular context the change is for the good of the overall enterprise, possibly despite the metrics. This may open up a coaching session to exchanging seats and probing where exceptions risk the consistency of service delivery – as there are too many exceptions – or confuse the clarity of the values and purpose for some staff.

The argument in this reflection is that coaches may need to work with managers operating in such a context across a range of leadership approaches.

They may have to be analytical – customer transactions need to be profitable; they may have to be worldly – they may have to understand demographic and social trends; they may have to be decisive – about individual customers and about systems that are failing; they may have to collaborate with colleagues – solving system failures; and most difficult of all they have to find the time to stop and think about how it is all going. Customers and users do a lot of reflection on how they have been treated and have long memories, yet often this is not matched within the service delivery organisation^{viii}.

Perhaps most important of all recent thinking reminds us that contextual understanding of a customer facing business needs to be simple and relevant. As Andy Neely^{ix} has recently advanced in his research on balanced score-cards “managers lost their focus once they had more measures to think about” and “needed more local information”; so where better to get this from than the staff?

Most leaders in customer driven businesses are good at making decisions, they have to be. The challenge for their development is to improve the quality of the decisions through learning cycles^x that ground theory, experience and action in the trenches of the working day and crucially make the time to reflect on what they are hearing and seeing, and what they themselves are shouting. This may explain why for the development of any leaders in customer facing markets

online learning and coaching are replacing classrooms and away-days, and execution is being advanced by developing presence, listening, and making systemic decisions. Such development demands the blending of strategic, managerial and leadership disciplines ‘close to the work’^{xi} – the context demands it.

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ⁱ *The Wise fools Guide to Leadership*: Peter Hawkins. O books .2005

ⁱⁱ *Mud, Blood and Poppycock*: Gordon Corrigan. Cassel. 2003

ⁱⁱⁱ *Leadership Without Easy Answers*: Ronald A. Heifetz: Harvard University Press 1994

^{iv} *The Innovator’s Solution*. Clayton M. Christensen & Michael E. Raynor. HBS Press 2003

^v *Managing Customer-Centric Innovation – systematically*. Larry Selden & Ian C. MacMillan. HBR April 2006.

^{vi} See the work of Jane Warrilow and others

^{vii} *Home Depot’s Blueprint for Culture Change*. Ram Charan. HBR April 2006.

^{viii} *The Five Minds of the Manager*. Jonathan Gosling and Henry Mintzberg. HBR November 2003

^{ix} *Performance Measurement*. Andy Neely. The Economist Press. 2006

^x *The Manual of Learning Styles*. Peter Honey and Alan Mumford. Peter Honey publications 1992

^{xi} *Developments in Close Learning*. Keith Kinsella. Exeter CLS Working Paper (pre-publication)