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INSIGHT REPORT

Activating Middle Managers to Drive CX Change

21 BEST PRACTICES FOR MOBILIZING KEY INFLUENCERS IN SHAPING AND TRANSFORMING YOUR COMPANY

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EXECUTIVE SUMMARY

It's hard to get any group of employees to change their behavior when their managers are still reinforcing old processes, measurements, and beliefs. Middle managers show up in organizations under a variety of titles, but regardless of the descriptor, they are the ones who execute plans, lead teams, and direct collective efforts to produce results. Because of the importance of these responsibilities, Temkin Group made "Activating Middle Managers" a key strategy in its change model, *Employee-Engaging Transformation*. In this report, we examine five categories of best practices for successfully activating middle managers in organizational change efforts: *Involve Middle Managers in Shaping the Change, Engage Middle Managers in Goal Setting, Train Middle Managers on Key Skills, Provide Middle Managers Tools to Engage their Teams,* and *Connect Middle Managers with Customers.* In this report, we also describe the critical role that senior leaders must play across all of these strategies.

MIDDLE MANAGERS ARE WORTHY OF MORE ATTENTION

Organizations have high expectations for their middle managers as this group of employees serves as a bridge between the vision and goals of senior leaders and the day-to-day work of individual contributors. However, success doesn't necessarily come easily to middle managers as they have to:

- **Know the business.** Middle managers have to understand the company's strategy, offerings, market, and key measures of success and know how their department or area of responsibility fits into it all. They also have to understand company policies and procedures along with the politics of how things actually get done inside the corporate culture.
- **Build teams and manage people.** After succeeding as individual contributors themselves, managers now are in the position of leading a group of people to get the work done. This requires spending time and energy demonstrating a new set of competencies to hire employees, manage their performance, provide coaching and mentoring, motivate team members, and recognize and reward desired behaviors.
- **Create and execute plans.** When it comes to bringing a strategy to life, companies rely upon middle managers to develop and execute specific plans within their area of responsibility. Although they want to do this well, managers are often hampered by an environment of scarce resources, changing priorities, lagging or evolving tools and systems, and organizational silos.
- **Deliver results.** Even during times of transformation, middle managers don't have the luxury of abandoning their existing short-term goals. They are pushed to change how people operate, yet punished if they miss performance metrics, most of which remain focused on the old way of working.

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Middle Managers Require More Support During Times of Change

Middle managers are critical players during periods of change. Managers whose companies engage and support them throughout the transformation can positively impact employees' understanding of and buy-in to the change, accelerate the speed of how quickly new behaviors are adopted, and provide senior leaders with feedback about what's working and what's not. However, instead of supporting the company's transformation, these key employees often appear to be barriers to making changes. What's the problem? Rather than being treated as a group that will bolster the organization's success, middle managers are:

- **Not engaged.** Temkin Group's research with executives at large organizations found that only 26% think that middle managers are engaged in the company's customer experience efforts, compared to 47% of executives and 49% of customer-facing individual contributors (see Figure 1).
- **Often ignored.** Less than one-third of large organizations report placing a significant focus on middle managers as part of their employee engagement efforts (see Figure 2). Despite this neglect, our research did show a 5-point uptick over the previous year in the percentage of middle managers who are moderately or highly engaged at work.[1]
- **Viewed as an obstacle.** Nearly half of large companies in Temkin Group's research report that inconsistent buy-in among middle managers is a significant obstacle to their employee engagement efforts, second only to a lack of a clear strategy (see Figure 3).
- **Neglected during times of change.** When it comes time to change, nearly two-thirds of organizations do not consistently target middle managers to build buy-in and support for the change. Furthermore, less than 30% of middle managers are getting trained on the knowledge and skills they need to help guide employees through the change (see Figure 4).

BEST PRACTICES FOR ACTIVATING MIDDLE MANAGERS

Temkin Group identified activating middle managers as one of the five key strategies in a concept called Employee-Engaging Transformation (EET).[2] We define EET as (see Figure 5):

Aligning employee attitudes and behaviors with the organization's desire to change.

To broaden our look at how organizations are explicitly enlisting the support of middle managers, we spoke to a number of companies and uncovered best practices that fell into five categories (see Figure 6):[3]

1. **Involve middle managers in shaping the change:** Help middle managers to personally embrace the change by soliciting their input about how the organization can best accomplish its change goals.

[1] See Temkin Group Insight Report, "Employee Engagement Benchmark Study, 2015" (February 2015)
[2] See Temkin Group Insight Report, "Introducing Employee-Engaging Transformation" (February 2014)
[3] Companies interviewed for this report included Achievers, Adobe, ATB Financial, Bank of the West, LifeLabs, PrimeroEdge, The Results Companies, Strativity, Stryker, SunGard, and Touchpoint Services.

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2. **Engage middle managers in goal setting:** Jointly set targets with middle managers for individual performance and team progress.
3. **Train middle managers on key skills:** Help middle managers gain the knowledge and capabilities needed to lead change and to succeed in their role in the new environment.
4. **Provide middle managers with tools to engage their teams:** Make it easier for middle managers to introduce, reinforce, and sustain the change by designing specific tools for that purpose.
5. **Connect middle managers with customers:** Shrink the gap between middle managers and the customers who will be experiencing the change.

#1: Involve Middle Managers in Shaping the Change

Middle managers are the crucial glue that connects what the organization hopes to accomplish with what really gets done. To gain middle manager involvement up-front, companies should:

- **Create middle manager change champions.** Senior leaders don't need to figure out the entire change plan themselves. Instead they can recruit a group of middle managers to provide ideas on how to effectively align employees with the company's change goals and who can model the desired behaviors. Adobe started by looking for middle managers who were already demonstrating the customer-centric behaviors that the company wanted to spread to all employees. The company recruits various managers from across the company, ranging from marketing research managers and senior product managers to those responsible for customer-facing teams. Those champions are then invited to participate in customer experience panels and leadership discussions and are also featured in employee communications aimed at spotlighting their practices and the impact made on customers. ATB Financial identified change champions to participate in crafting the rollout of its new brand story and culture. Executive VPs identified one or two individuals from their leadership teams who were responsible for connecting the front-line and the executives. These champions provided input on how and where to talk about the change with the employees in a way that best aligned with each respective groups' points-of-view and situations. This plan was dubbed "The Infusion."
- **Use middle managers to define what success looks like.** Because middle managers know what work their team must accomplish every day, it makes sense for them to be the ones who define what behaviors their team must demonstrate in order for the change to be noticed by customers. When LifeLabs started making its work more customer-driven, it included middle managers in the initial development of a patient journey map and the subsequent work to validate the journey. Middle managers also participated as members of a national project team to define the new service standards through a series of workshops and other activities centered on customer, industry, and employee research. Next, the project team translated the findings of this research into desired behaviors. Each project team member then vetted the proposed standards with two peers to capture their reaction and their input on what specific behaviors should be attached to each new standard. When LifeLabs was really to roll

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out the new service standards, a pilot class made up of 90% middle managers reviewed content and gave feedback prior to a full launch.

- **Establish open channels of communication.** Change efforts often stumble due to disjointed or truncated communication efforts. Successful organizations recognize the need to establish open and ongoing communications with middle managers throughout the change journey. When Bank of the West set out to develop its first formal customer experience roadmap, the vice president leading the effort met with branch managers, branch-based customer service managers, area/regional/division managers of the branch network, as well as leaders from different corporate functions like sales, operations, and the call center over a two and a half month time period. These meetings not only raised awareness about the bank's CX vision and strategy, but it also captured input from middle managers, which it then incorporated into the final version of the CX roadmap. When the roadmap was ready to share, Bank of the West invited branch managers and others to the roadshow presentations where they saw their input reflected in the final design. Not only were relationships between middle managers and the CX team established through this effort, but also direct communications between the two groups have continued on, with managers sharing questions, comments and ideas as the CX strategy moves forward.
- **Institute a regular cadence to gather ongoing input.** Middle manager involvement is not only needed at the start of a change journey, but throughout the journey. Touchpoint Services' regional operations directors regularly meet with its facilities managers to share company updates, field Q&A, and encourage best practice sharing across the group. In addition, the CX team, executive chefs, retail marketing managers, and other leaders come for facility visits to discuss CX improvements with the local management teams. SunGard uses a *Service Circle,* where managers ranging from product development to support meet once a month by phone. Each meeting focuses on one of the firm's prioritized systemic issues, and participants share their progress, brainstorm next steps, and support each other. Service Circle managers were handpicked and recruited based on their influence in their respective areas and their ability to provide input and communicate updates back to their teams.
- **Make middle managers responsible for training their teams.** Middle managers play a key role in guiding employees on a daily basis, so there is no reason not to utilize them when introducing elements of the change to their teams. When the Disney Store was preparing to roll out its new guest experience training, it held specific sessions with district managers and store managers. District managers tested the session content and provided feedback about the training and development team. Training for store managers included a run-through of the session and improvisational exercises to prepare them to train cast members (employees) for new in-store responsibilities, such as storytelling and other interactive guest events.[4] ATB Financial's branch managers were one of the earliest audiences to get exposed to the company's new brand story and culture. When the time came to launch the new brand story through a bank-wide livestream, middle managers were charged with leading local discussions with their teams immediately following the broadcast. Managers received a launch kit built around a series of questions to ask their teams, including "What does the story

[4] See Temkin Group Insight Report, "The Five I's of Employee Engagement" (November 2012)

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mean to us? How are we already doing some of the things the story talks about? What does this change for us?"

#2: Engage Middle Managers in Goal Setting

Senior executives often set goals and objectives for the company, which then cascade down through the organization. Rather than piling new targets on top of middle managers' existing goals, companies should:

- **Encourage managers to set goals with their teams.** If a company asks middle managers to set team goals, it should teach them how to bring employees to the table during the process. The EMEA division of Waters Global Services purposefully utilizes middle managers to set goals and coach employees during periods of change. To enhance trust and build a comfort level around the new objectives, middle managers work with employees in a workshop setting to collectively define both team and individual goals. Managers stay in close contact with their team members through ongoing one-on-one discussions about individual performance, work/life balance, and what the employee needs to do to contribute to the team's success. Managers capture these monthly conversations in a working document that they review with their leaders throughout the year.[5] A software firm serving the education industry rolled out team goal setting following company-wide CX training. Managers work with their teams to pick a monthly focus from among the company's CX priorities, such as next issue avoidance or providing alternative offerings. Each team then discusses how to implement its focus area and sets performance targets for itself. Throughout the course of the month, middle managers put an emphasis on coaching their team on their progress in the respective area of focus. And during annual performance plans, managers and employees work together to set specific goals about living in accordance with the company's values. These company values also guide managers' year-round individual coaching efforts.
- **Seek middle manager input during goal setting.** Middle managers should not just passively receive the outputs of the corporate goal setting process, but instead they should have an active voice in it. Stryker conducts middle manager-level small group workshops for senior leaders to talk through the company's change strategy with their direct reports. The dialogue focuses on getting middle managers to define what the company's change goals mean for them on a day-to-day basis, what will be different, and how the changes are reflected in their individual annual objectives. The company then supports managers with talking points, activities, and an FAQ guide to help them bring this information to their teams. LifeLabs formed *roundtable groups* that meet four times to share their input, decide what needs to be implemented, and develop action plans to support employee experience changes. LifeLabs' Organizational Effectiveness team is involved with each roundtable group throughout the process, facilitating the groups, documenting the outputs, and providing other support as needed. At the end of the sessions, the roundtable groups' output is summarized for the executive leadership team's review and approval.
- **Link incentives to goals that middle managers can personally impact.** If the transformation is important to a company, then it should incorporate incentives and

[5] See Temkin Group Insight Report, "Introducing Employee-Engaging Transformation" (February 2014)

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rewards for leaders and managers that are tied to measurable progress towards the change goals (see Figure 7). Adobe has included its customer experience/advocacy goals as part of its annual incentive plan for middle managers and above. The incentive amount varies based on role with an emphasis on how individual manager behavior impacts customer advocacy goals. The program includes common customer-centric objectives that are shared by all program participants and it also challenges individual managers to think about how they and their team influence CX outcomes. Bank of the West has a quarterly incentive program in place that is based on branches reaching various levels of customer satisfaction. Each branch, area, and region has their own target for customer advocacy based on historical performance, market needs and expectations, and other performance factors. In addition, senior leaders regularly recognize top performers in customer satisfaction and advocacy survey results with trophies, certificates of achievement, and additional incentives.

#3: Train Middle Managers on Key Skills

During times of change, middle managers are asked to take on roles and to do work that extends beyond their day-to-day responsibilities, and some of this work requires new knowledge and skills. To equip managers with these new capabilities, companies should:

- **Help middle managers make the transition from individual contributor.** Individuals aren't magically endowed with new knowledge and skills when they are promoted up from their individual role. They need basic manager training to have the foundation on which to build the skills they need to lead change. Touchpoint Services has a three-part training program designed specifically for new managers (see Figure 8). It includes supervisor training called *Establishing Your Roots*, which consists of ten modules on topics like delegation, conflict management, and making the switch from co-worker to supervisor. *New Manager Orientation* is a three-day program that includes two presentations by the CEO along with training on other corporate priorities. And within the New Manager Orientation is *Love 'Em or Lose 'Em* training, which delivers engagement strategies for employee retention.
- **Host formal leadership training.** While some managers may bring inherent leadership skills to their role, many more benefit from formal programs that develop these skills. ATB Financial offers a multi-faceted program to ensure that its middle managers are exposed to the breadth of capabilities they need to be successful. *Masterful Leadership* is an enterprise-wide program that focuses on developing leaders and helping them further their skills. The program covers skills such as having critical leadership conversations and understanding individual leadership styles, along with other important management processes. The *Foundational Leadership* program brings a variety of individual topics to branch managers—from the leader's role in onboarding a new employee to effectively handling performance management or disability management issues. Lastly, *Club Catalyst* delivers experience-based learning by exposing middle managers to opportunities such as participating in board meetings or risk management committee meetings and attending external thought leadership sessions. Adobe's development programs are aligned with a specific set of leadership criteria set in the context of understanding and engaging customers. Programs are delivered through formal training, virtual seminars, and an ongoing thought leadership speaker series, where leadership criteria are linked to outcomes for the company, its customers, and its employees.

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- **Teach middle managers how to manage change.** Companies need to prepare their managers for their unique role as a change leader so they can effectively lead their teams. LifeLabs trains middle managers, along with all other employees, with a series of sessions on how to navigate change. For managers who lead people, the *Leading Teams Through Change* is a four-hour session that covers how to champion change within a team and deal with the different personalities that might emerge. All employees attend the three-hour session called *Going Through Change* to learn about a specific change management model and understand how individuals deal with change. This session includes a personal self-assessment to raise awareness of each individual's natural reactions to change. And for those managers who are leading specific change projects, *Installing Change* focuses on how to talk about change, and includes an Excel-based *change toolkit* that guides managers through a structured approach for documenting key considerations and questions, assessing target audiences, and developing change messages.
- **Reinforce important knowledge and skills through online learning.** Training doesn't have to be confined to classroom-based lectures. Macy's middle managers, including store managers and merchandising managers, learn how their individual decisions can impact the overall business through online simulations. Teams of four to five managers work together managing a mid-size retailer through typical issues like underperforming departments or altered delivery schedules.[6] The Results Companies started live 90-minute webinars specifically for middle managers to help build their personal and professional leadership skills. The webinars also help managers identify and navigate the tools and the resources available to them across the organization. For example, when it was identified that there was a need to help middle managers better understand and use available company data, the team created a webinar delivered by the Director of Finance and COO covering the standard reports, the data included, what the performance measures mean, and how the data and measures help the organization manage its efforts.
- **Improve middle managers' skills in providing feedback.** Change requires employees to take on new behaviors, so performance feedback and development conversations take on more importance. Halogen Software requires all mangers to have a one-on-one meeting with every direct report at least every other week so they can discuss how things are going. For these conversations to be effective, the company believes managers need to understand what motivates their employees, and so each employee takes an abbreviated Myers-Briggs Type Indicator (MBTI®)[7] test. This information gives managers a better understanding of individual motivations and helps them discern the most effective way to talk to each employee during coaching conversations. As part of Safelite AutoGlass's *People Pledge* initiative, 1,000+ leaders participated in its custom-designed *People First Leadership* development series aimed at preparing them to support this employee-focused philosophy (see Figure 9). Its *Coaching for Performance* workshop introduces Safelite's company-wide coaching model and helps managers develop skills to use with their employees. The company uses assessment tools to collect feedback from associates regarding managers' skill

[6] Feintzeig, Rachel (August 7, 2013) Building Middle Manager Morale. The Wall Street Journal. Retrieved from http://www.wsj.com

[7] The Myers-Briggs Type Indicator® and MBTI® are registered trademarks of the MBTI Trust, Inc.

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in coaching. In addition, coaching is specifically listed as part of the company's core competencies, which are included in the managers' performance reviews.[8]

#4: Provide Middle Managers with Tools to Engage their Teams

Organizations regularly turn middle managers loose to support change efforts without giving them any guidance on how to engage their employees. Rather than leaving these key employees empty-handed, companies should:

- **Make it easy for managers to recognize desired behaviors.** Employees do what is measured, incented, and celebrated, so it's important that middle managers have a way to recognize employee behaviors that support the change. ATB Financial's *Everyday Heroes* program utilizes an online tool to recognize employees across a set of nine essential attributes. Senior leaders and managers are allotted a certain number of points each month to recognize employees' performance. Employees can redeem accumulated points on selected prizes. This platform is also linked to an intranet site where employees can share their personal stories on how they are living the brand with customers. Hershey Entertainment's *Legacy Check* program gives every manager and supervisor a "checkbook" they can use to write a Legacy Check and give on-the-spot recognition when they catch an employee doing something exceptional in line with Hershey's values. Copies of the check go to the employee, their supervisor, and the gift card program. As an employee receives *Legacy Checks* during the course of a year, the value increases in $5 increments each time. Employees can save up their gift cards and use them across Hershey entertainment options (including concerts, restaurants, spa, theme park, etc.). Recipient profiles are published on Hershey's intranet—including their name, picture, what they did, and who presented the award.[9]
- **Share employee feedback with middle managers.** Employees are a valuable source of information that can help middle managers understand what's working and not working and adjust their actions accordingly. JetBlue Airways emails its employee engagement survey monthly to a sample of crewmembers across the organization. Questions cover core metrics including performance, retention, and Crewmember satisfaction. JetBlue's Crewmember Insight team works with its *Survey Ambassador Team*—which is made up of directors and managers across the business—to define action plans across the organization. At Stryker, every middle manager receives survey results and then has a collaborative discussion with their teams about what to focus on to be successful. Stryker also offers three to five training programs each year that address how middle managers can create a more focused and engaged team based on employee and customer feedback. The Results Companies' *Employee Voice* program allows employees to share good things that are happening throughout the company, as well as concerns, through either anonymous or named messages. The company has defined workflow to ensure visibility by a direct manager to ensure resolution or shared recognition on these communications.
- **Use a Train-the-Trainer model with middle managers.** To deliver training to employees across its geographically dispersed retail bank branches, BMO Financial

[8] See Temkin Group Insight Report, "Employee Engagement Case Studies: The Five I's in Action" (May 2013)
[9] See Temkin Group Insight Report, "The Five I's of Employee Engagement" (November 2012)

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trained branch managers during regional conferences to facilitate its *Customer Experience Learning Map* training program with their teams and to use the maps as a reinforcement tool on an ongoing basis (see Figure 10). Learning maps are visualizations of BMO's transformation journey, and the company uses them to lead a small group through a facilitated discussion that includes facts, practical how-to's, and open-ended questions. Groups of six to ten people discuss important issues, and informal facilitation keeps the dialogue focused and productive. The use of the learning maps as a core element of the training allows for rapid deployment across thousands of employees without relying on highly experienced trainers. During the train-the-trainer sessions, each branch manager received a kit to use to deliver the course at his or her branch. Branch managers have access to dedicated learning resources, professional facilitators, and virtual classroom facilities to support them in their local training responsibilities.[10]

- **Help middle managers learn from each other.** Middle managers can be a font of information and ideas for their peers, so creating opportunities for them to share their knowledge with each other is important. Bank of the West uses its web portal to capture branch managers' branch improvement action plans. When these plans result in a real performance improvement at the branch, the bank captures the tactics the managers used in an *Idea Bank,* which all branch managers can access to see what others have done. The Idea Bank is regularly reviewed and "best of the best" tactics along with both external best practices and other ideas submitted from the branches are then combined into best practice guides. These guides cover topics ranging from customer problem solving and proactively seeking out customer feedback to cross-selling and creating a positive branch appearance. Given the variety of individual strengths and individual personalities, Hampton interviewed a mix of managers from across their franchises to learn what techniques and approaches they used to engage team members. Hampton now uses a web-based system called *Sharecast* to share these and other best practices across hotel lines (see Figure 11). Managers across all Hampton locations can ask and answer questions on this system, which has created a database of successful activities. Hampton has also integrated these best practices into communications, training, tools, and reinforcement tactics.
- **Provide centralized support for middle manager efforts.** Middle managers have enough on their plates as it is, so providing centralized resources that support their efforts to lead change will raise the likelihood of their success. Adobe assigned two people to create an assortment of tools, labs, and other customer advocacy resources specifically for middle managers to use with their teams. For example, these resources adapted some of Adobe's customer listening programs into virtual capabilities so that all employees globally could tap into customer insights from the call center, social media, etc. The pair also created CX tool kits on customer listening, CX reviews, and other topics that managers could either access themselves or have a workshop facilitated by one of the dedicated team members. Rather than relying entirely on its managers to engage employees in its change efforts, Stryker's centralized CX team supported middle managers' individual efforts by hosting an employee film festival that centered around its refreshed mission and corporate strategy. Employees first had a chance to submit an individual 45-second video on how they contributed to the company's mission and impacted customers. This was

[10] See Temkin Group Insight Report, "Employee Engagement Case Studies: Five I's in Action" (May 2013)

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followed by a team contest for the best short video on what the mission and strategy meant to them and how they were contributing. Over 250 team entries were watched and graded, and the top three videos were showcased across the company in town hall meetings and other channels.

#5: Connect Middle Managers with Customers

Sharing internal information with middle managers is important, but exposing them to customers can be even more powerful. To bring middle managers and customers together, companies can:

- **Deliver role-specific customer insights for middle managers to use with their teams.** At UMB, managers have role-specific dashboards that supply a variety of insights from the company's voice of the customer (VoC) program. Mangers then use these insights to support employees through the change journey. Managers engage employees on a continuous basis using information from these dashboards, and these dashboards report on the branch or departments' performance both in fulfilling the bank's guiding principles and in closing the customer alerts triggered by customer feedback. Additionally, when a customer submits positive feedback about a specific associate, managers receive a Recognize Alert on the dashboard, which allows them to immediately congratulate this employee on a job well done.[11] It also enables managers to close the loop by thanking the customer. Middle managers at Touchpoint Services' can access patient feedback from daily reports along with other operational metrics via an online dashboard. *Daily LineUp* meetings provide managers with the opportunity to discuss customer metrics and improvement opportunities with their teams, something replicated at Touchpoint facilities across the country (see Figure 12).
- **Provide structure for formal customer insights reviews.** Middle managers are experts in a lot of areas, but knowing how to understand and take the best course of action on customer insights may not be one of them. Adobe's Global Services team—which includes the company's customer-facing functions—commissioned extensive market research on a key business segment with current customers, lost customers, and users of competitors' products. The customer advocacy team used the findings from this research, which covered elements of the customer experience and a customer ranking of importance and perceptions of Adobe, to create department specific reports that they delivered to the middle managers responsible for each area. Managers gained very specific data about the customers they are trying to connect with and serve, so they were able to have better conversations about what actions to take and how to translate customer expectations into a set of behaviors for their teams. Adobe's customer advocacy team also works with product managers and marketing managers on formal *CX Reviews*. During the review, managers and their team members serve as subject matter experts as the company grades itself on specific customer scenarios. SimplexGrinnell—a fire and life-safety company—holds annual district *NICE Workshops* (**N**ext **I**mprovement in **C**ustomer **E**xperience) to drive continuous improvements across the company. During the workshop, managers, administrative staff, and front-line employees review CX metrics and code customer verbatim comments by service issue to identify the top customer issues. The output

[11] See Temkin Group Insight Report, "Introducing Employee-Engaging Transformation" (February 2014)

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of the workshop is an action plan on how to address the top issues identified, and this action plan is reviewed on a quarterly basis.[12]

- **Bring middle managers and customers together.** While reports and dashboards can deliver customer feedback to managers, there is also a lot to be gained from bringing managers and customers together to learn from each other. An education industry software provider took advantage of an invitation to visit another local company to see their customer-centric culture in action. To prepare for the visit, the company gave middle managers worksheets to use to capture their observations around four A's: *Atmosphere, Actors, Activities,* and *Artifacts*. Immediately after the visit, managers held a debrief meeting in a conference room at the visit site to review their observations and key takeaways. These visits were so impactful that every employee—from receptionists to developers—now have a performance goal to visit a customer at least once per year. One way that Symantec connects people in mid-level roles broadly and strategically to the company's customer experience vision is to have managers who are responsible for end-to-end offerings in specific countries sit down and talk with customers, prospects, and former customers. This listening activity helps these employees understand critical moments of truth in the customer journey and, at the same time, raises their willingness to make changes where needed. Each manager takes what they learn from this listening activity back to his or her team and works alongside them, bringing the power of the stories from the customer interviews to their day-to-day work. This not only reinforces the overall shared vision of the company, but it also helps team decision-making reflect what was heard from the prospects, customers, and former customers.[13]

SENIOR EXECUTIVES PLAY A KEY ROLE IN ACTIVATING MIDDLE MANAGERS

While the best practices we outlined above should help activate middle managers, they won't have the full impact without an added dose of *Persistent Leadership*.[14] Rather than viewing middle managers as obstacles to change, or ignoring them altogether, senior executives need to take a personal, on-going role in activating them as part of the company's change efforts. How can senior executives help? By following three steps (see Figure 13):

- **Communicate "why."** After gaining buy-in for the change at the executive level, organizations often make the mistake of going straight to the frontline to build their understanding of and alignment with the changes. Instead, executives need to make sure that middle managers are exposed early and often to both why the company is going through the change in the first place and why, in the long run, the change will be good for them, their employees, and the company as a whole. In addition to communicating "why" to middle managers, senior executives also need to help managers in turn explain the "why" to their teams. Senior leaders should help middle managers craft their own scripts to use while communicating with their teams to stay aligned with ongoing executive communications.

[12] See Temkin Group Insight Report, "The Five I's of Employee Engagement" (November 2012)
[13] See Temkin Group Insight Report, "Introducing Employee-Engaging Transformation" (February 2014)
[14] Ibid.

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- **Model the desired behaviors.** Employees pay attention to what leaders do, even more than to what they say. Senior executives can demonstrate how important middle managers are to change efforts by working side-by-side with them on change-related actions. A good lesson for senior executives is, "Don't ask middle managers to push through behaviors that you aren't willing to demonstrate yourself."
- **Remove obstacles.** Organizations don't change easily, so there's always strong support for the status quo. That's why executives must identify and help remove organizational barriers that hinder success. One way executives can do this is by working with middle managers to regularly uncover and remove obstacles that are impeding progress. Before rolling out any changes, LifeLabs' leaders speak with two employee councils that include middle managers to get their input and identify any red flags from the employees' perspectives.

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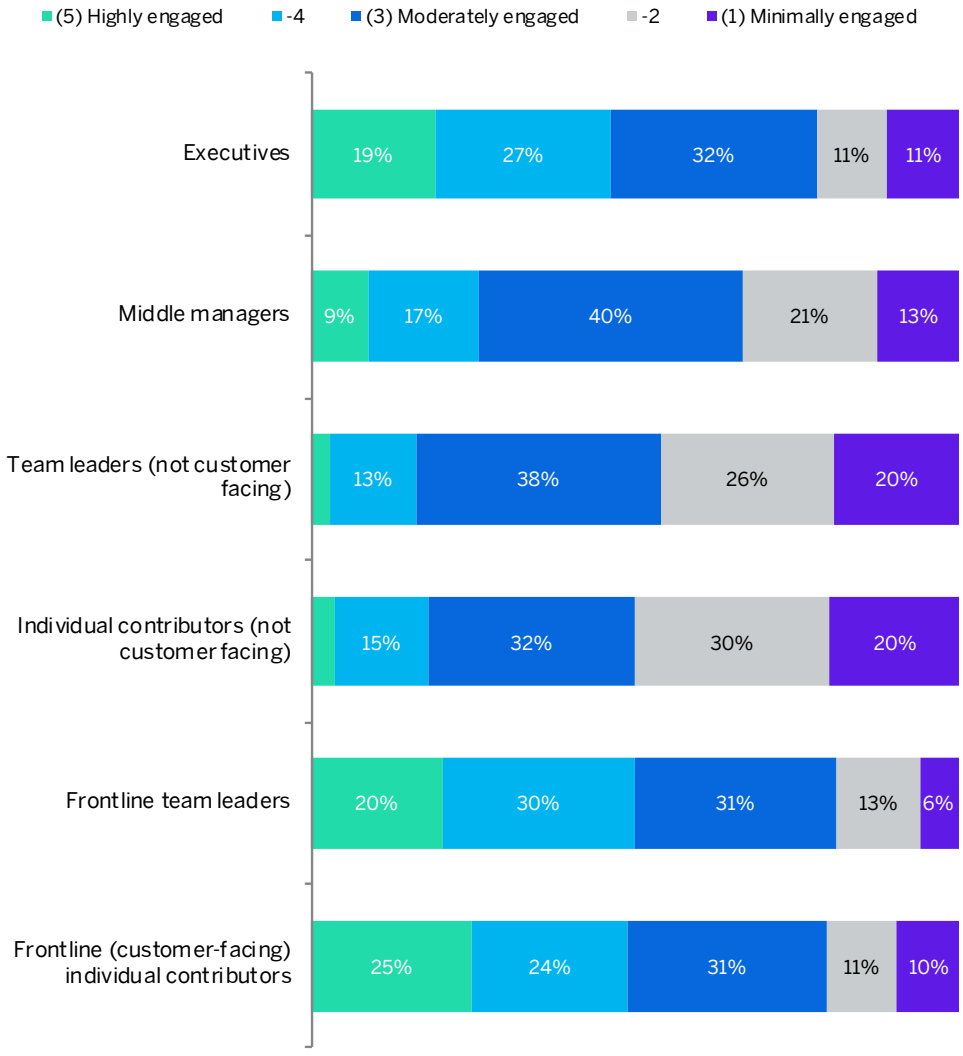
Level of Engagement Across Employee Groups

To what degree do you think that these groups of employees are engaged in your organization's customer experience efforts?



Base: 202 companies with 1,000 or more employees
Source: Temkin Group Q2 2014 CX Management Survey

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Figure 1

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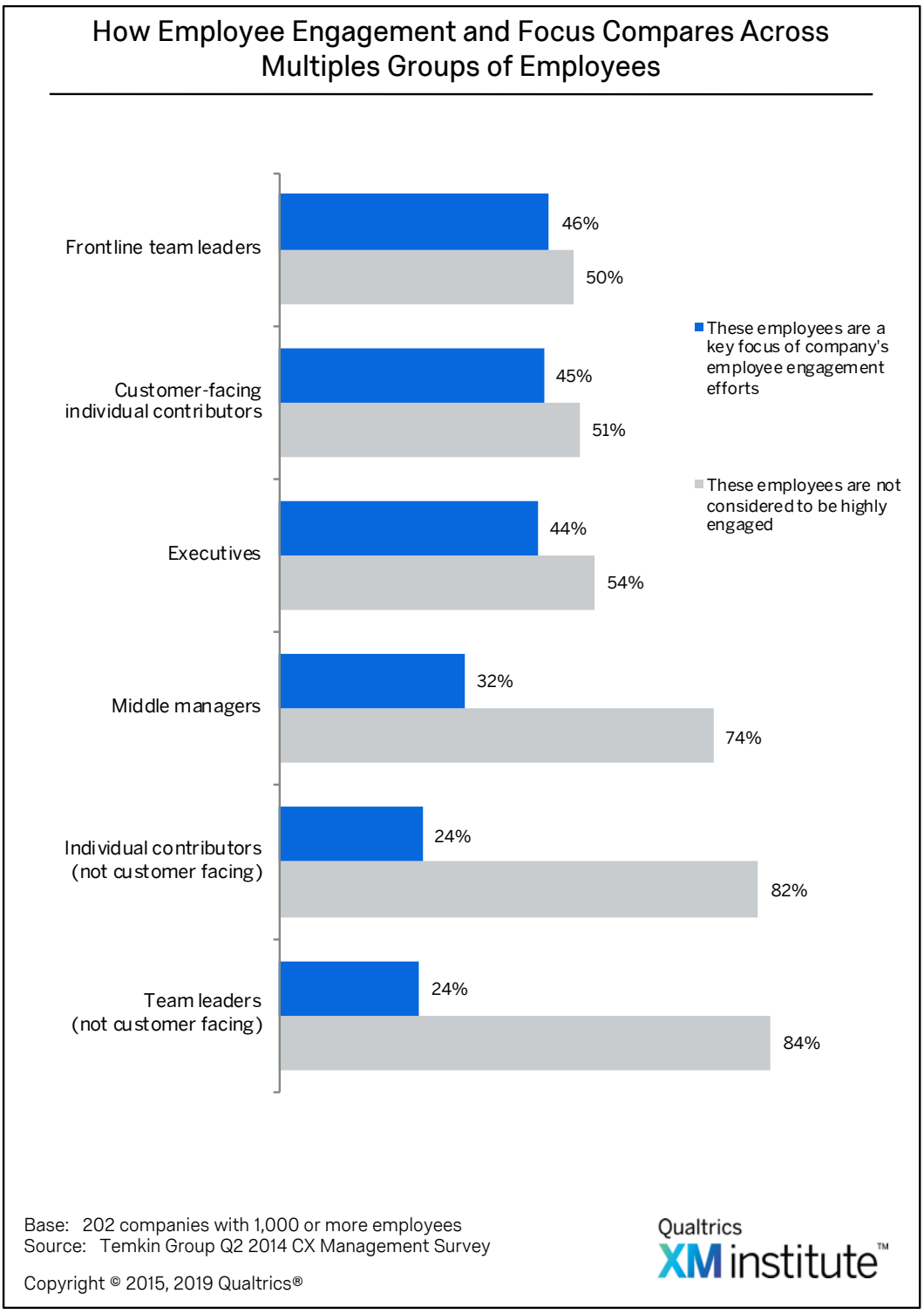

Figure 2

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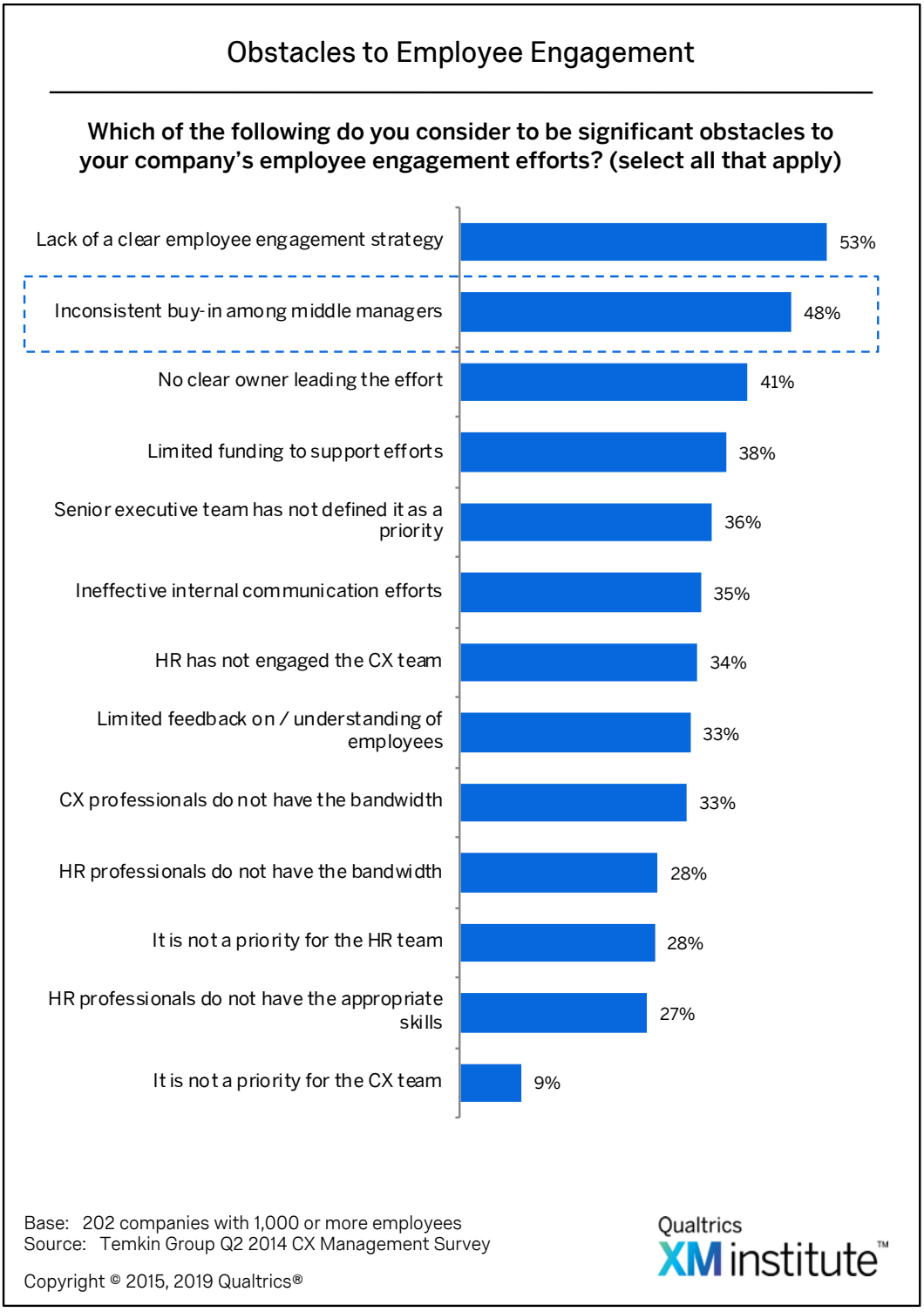

Figure 3

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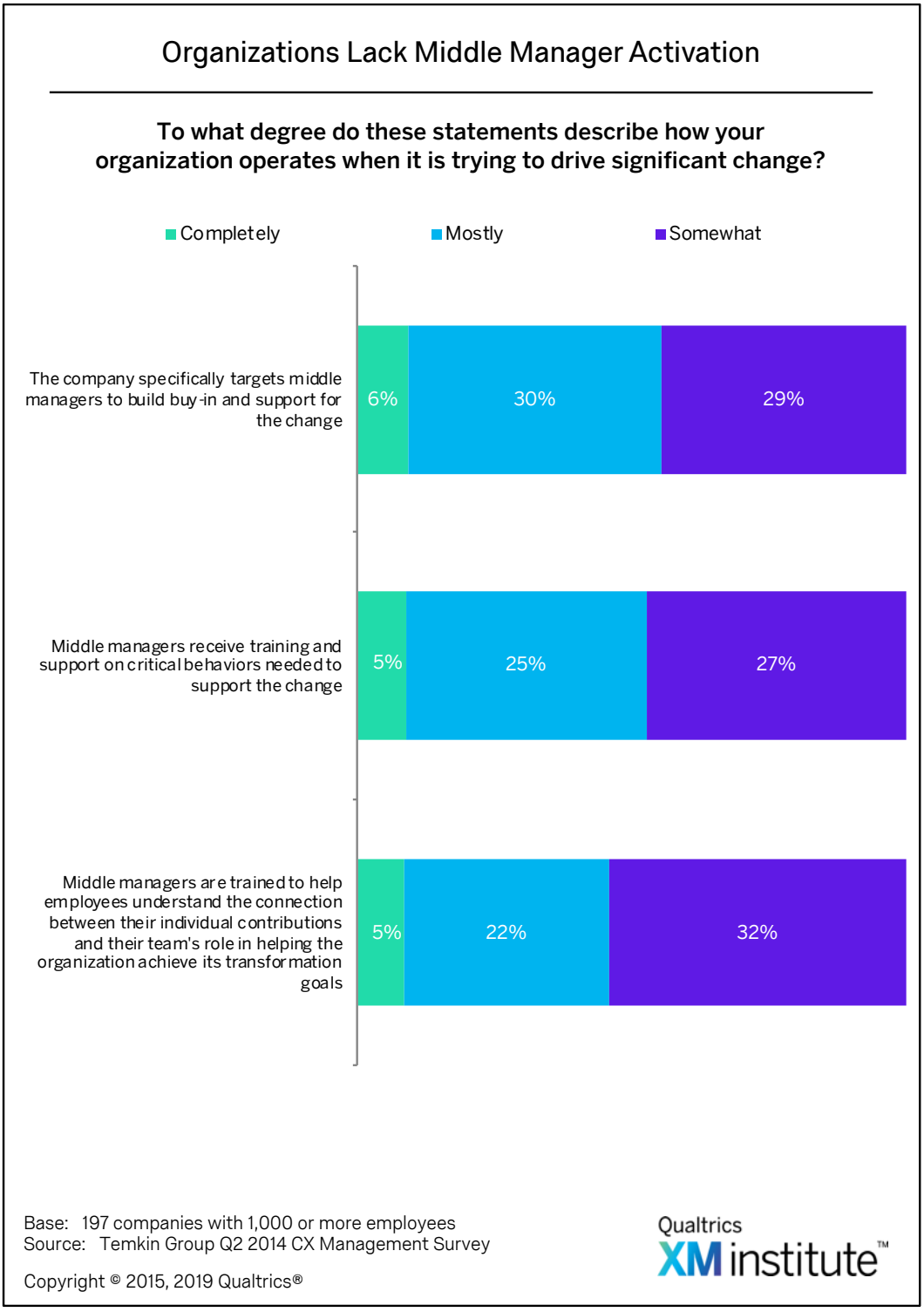

Figure 4

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Employee-Engaging Transformation (EET)

Five Strategies of EET

Strategy	Description
Vision Translation: Connect Employees with the Vision	The organization clearly defines and conveys not only what the future state is, but why moving away from the current state is imperative for the organization, its employees, and its customers.
Persistent Leadership: Attack Ongoing Obstacles	Leaders realize that change is a long-term journey and commit to working together until the organization has fully embedded the transformation into its systems and processes.
Activated Middle Management: Enlist Key Influencers	Middle managers are invested in the transformation and understand their unique role in supporting their employees' change journeys.
Grassroots Mobilization: Empower Employees to Change	Frontline employees operate in an environment where they help to shape and are enabled to deliver the change.
Captivating Communications: Share Impactful, Informative Messages	The organization shares information about the change through a variety of means that balance both the practical and the inspirational elements for each target audience.

How EET is Different From Other Change efforts

	Today's CX Change Efforts	Employee-Engaging Transformation
Executive mindset	Short-term change	Long-term sustainability
Change efforts	Mandated top down	Designed top down and refined bottom-up
Role of employees	Conformance	Involvement
Planning metaphor	Command and control	Political campaign
Focus of change	Processes and rules	Actions and behaviors
Key areas of leverage	Front-line employees	Middle managers
Primary focus of communications	What's changing	Why change is important

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Figure 5

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Best Practices for Activating Middle Managers

Category	Best Practices
1) Involve Middle Managers in Shaping the Change Help middle managers to personally embrace the change by soliciting their input about how the organization can best accomplish its change goals.	▪ Create middle manager change champions ▪ Use middle managers to define what success looks like ▪ Establish open channels of communication ▪ Institute a regular cadence to gather ongoing input ▪ Make middle managers responsible for training their teams
2) Engage Middle Managers in Goal Setting Jointly set targets with middle managers for individual performance and team progress.	▪ Encourage managers to set goals with their teams ▪ Seek middle manager input during goal setting ▪ Link incentives to goals that middle managers can personally impact
3) Train Middle Managers on Key Skills Help middle managers gain the knowledge and capabilities needed to lead change and to succeed in their role in the new environment.	▪ Help middle managers make the transition from individual contributor ▪ Host formal leadership training ▪ Teach middle managers how to manage change ▪ Reinforce important knowledge and skills through online learning ▪ Improve middle managers' skills in providing feedback
4) Provide Middle Managers with Tools to Engage their Teams Make it easier for middle managers to introduce, reinforce, and sustain the change by designing specific tools for that purpose.	▪ Make it easy for managers to recognize desired behaviors ▪ Share employee feedback with middle managers ▪ Use a Train-the-Trainer model with middle managers ▪ Help middle managers learn from each other ▪ Provide centralized support for middle manager efforts
5) Connect Middle Managers with Customers Shrink the gap between middle managers and the customers who will be experiencing the change.	▪ Deliver role-specific customer insights for middle managers to use with their teams ▪ Provide structure for formal customer insights reviews ▪ Bring middle managers and customers together

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Figure 6

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Considerations When Linking Metrics to Incentives

Three Underlying Principles

1. If there is significant incentive tied to any metric, then people will look for ways to manipulate the measure.
2. If people don't understand a metric, then tying incentives to it will have little impact on their behavior and any downside in rewards will create a very negative response.
3. If people don't understand how they *personally* affect a metric, then tying incentives to it will have little impact on their behavior and any downside in rewards will create a very negative response.

Recommendations for Linking Metrics with Incentives

- **Create a metric that is easy to understand.** Educate employees about what it is, why it's important, and what they can do to affect it. Allow time (at least two quarters) for educating individuals.
- **Develop specific goals for the executive team first.** Start by using "shadow" goals without any compensation impact for at least two quarters so executives can understand how they affect the measurement. After executive goals are in place, use company- or depart-wide metric to raise awareness of the importance across the organization.
- **Establish performance bands, not absolute targets.** Because metrics can have unexplainable variance, tie incentives to bands of performance instead of to a single number. This focuses employees on making progress in the right direction and away from obsession about a single number.
- **Start with an incentive plan that is biased towards the upside.** To help eliminate some of the negative perceptions early in a program, introduce a plan where this is little negative impact on rewards if the goal is not hit, but there is positive impact if the goal is exceeded.

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Figure 7

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Touchpoint Services' New Manager Training Curriculum

Program	Primary Objective	Delivery	Additional Details
Establishing Your Roots **Supervisor Training**	Leadership development to transition top performers from "do-er" to supervisor	10 modules delivered in sets of two per site visit	▪ Modules delivered by members of customer experience team, as well as one delivered by CEO ▪ Participants complete "homework" after each session to put new skills into practice ▪ Focuses on key skills including conflict management, delegation, and dealing with difficult employees
New Manager Orientation	Acclimate new managers to Touchpoint Services Culture in the context of their new role	3-day session held bi-monthly at company headquarters	▪ Concentration on company values, *Top of Mind* business objectives, and other operations training delivered by CEO, Sr. VPs, and regional VPs ▪ Emphasis on fostering collaboration includes meeting every leader at the HQ
Love ,Em or Lose, Em **(LELE) Training**	Reinforce importance of employee engagement and retention	Included in New Manager Orientation	▪ Introduces 26 engagement strategies for employee retention ▪ Also covers front-line supervisory responsibilities ▪ Employees across the organization facilitate this session after completing a certification program

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Safelite AutoGlass's People Pledge

The "People Pledge"

You'll experience great leadership. We strive for great leadership. You'll be treated with respect. You'll often be asked for your opinions and involved in decisions that affect your work. You'll understand the big picture and your role in it. You'll receive coaching and guidance to help you reach your full potential and you'll be recognized for your hard work in delivering extraordinary results.

We focus on you first. Concentrating on our people is a key part of our business strategy. You'll have the tools, information and resources to position you for success, along with support and opportunity for a rewarding and fulfilling career

We hire top talent...that includes you. Having great people is what sets us apart from the rest. You'll work with smart people every day who will inspire you to be at your best. By bringing your ideas and applying your skills, you'll have endless opportunities to grow both personally and professionally.

You'll work in a caring culture. At Safelite, we've got a strong set of values and a big heart...for our people, our customers, our environment and the communities in which we live and work. We strive for a culture that will inspire you to achieve...not because you have to, but because you want to.

Safelite AutoGlass: People Powered Leadership Development Series

- Based on its People Powered philosophy, which is about driving business performance by putting people first and having an obsessive focus on having great people (through leadership, focus, talent, and caring)
- 1,000+ leaders participated in a development series including 75 e-learning courses on Safelite's core competencies, including topics such as "Creating Engagement" and "Coaching for Performance"
- People Powered concepts also integrated into talent management platform supporting performance evaluations, succession planning, recognition, and more
- Reinforced with the People Powered Leadership Award, which honors leaders who live up to the People Powered philosophy

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Figure 9

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BMO Financial Middle Managers Lead Training Using Learning Maps to Create Conversations

Incorporated trends affecting customers, which in turn have an impact on their expectations of their bank and banking experience.

Visual representation of vision, brand principles, and core values

During the course of training program, facilitator engages participants in interactive discussion moving them through the learning map.

The dialogue-driven nature of the learning map exercises makes this a tool that can be used multiple times with employees. No two conversations about the map are the same and new insights come out when the exercises are repeated with different groups or as the employee gains more experience on the job.

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Figure 10

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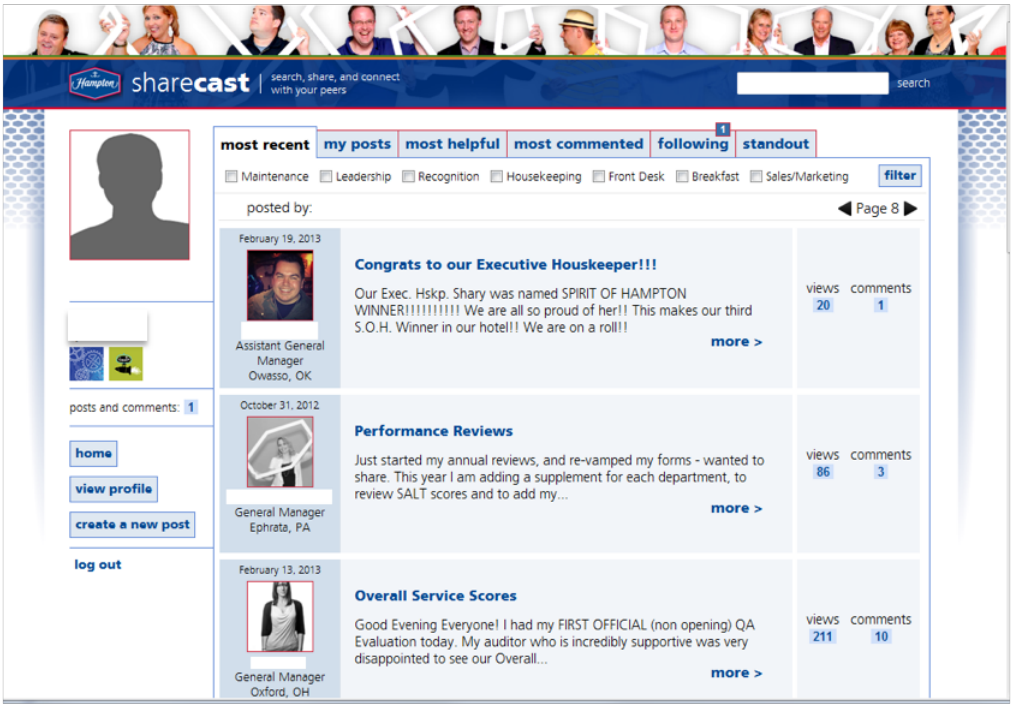
Hampton Managers Share Questions and Ideas Online

Screenshot of Hampton's sharecast internal collaboration tool



- Hampton provides the infrastructure to enable peer-to-peer connections between hotel managers and encourage them to share their "nuggets of brilliance" with fellow team members across its 1,900 properties.
- The sharecast site lets team members ask and answer questions or share best practices they have developed locally. Other viewers can rate the posts helpfulness, add additional comments, and contribute to the ongoing exchange.

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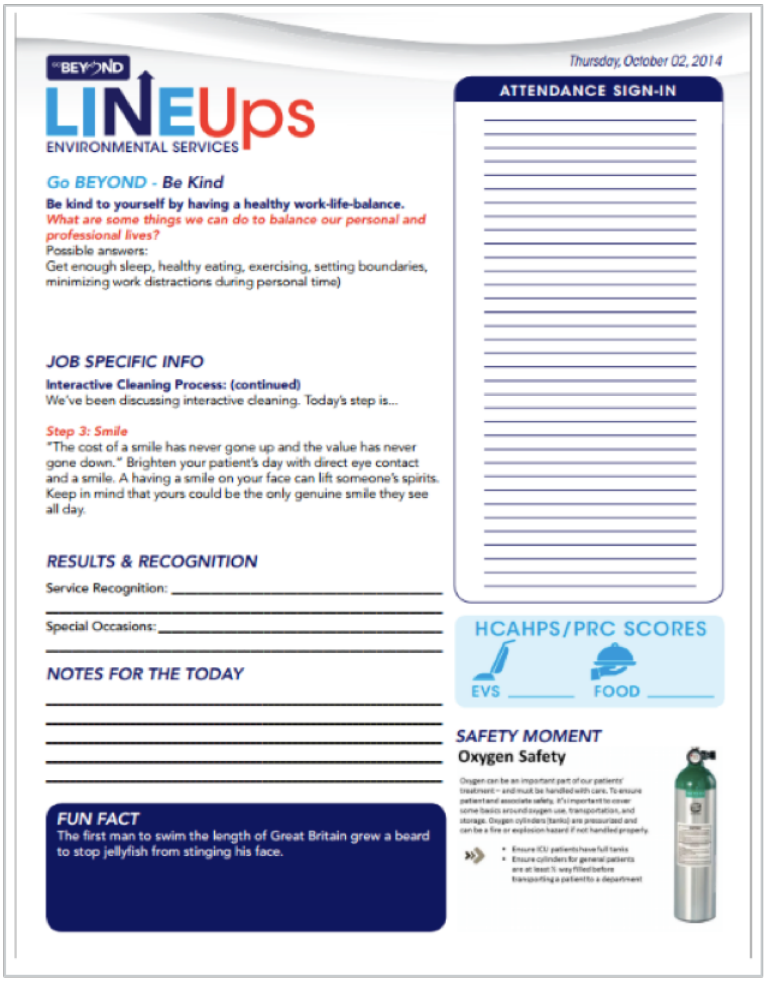
Figure 11

Touchpoint Services Incorporates VoC into Daily LineUp Meetings across All Departments

Touchpoint Services sustains its focus on customer experience through *LineUp* meetings held within every department across all locations every day. This meeting guide provides an outline for managers to use while sharing feedback from federally-mandated patient surveys, recognizing other results and special occasions, and reinforcing one of the company's *GoBeyond* CX Expectations



BEYOND

LINEUps

ENVIRONMENTAL SERVICES

Thursday, October 02, 2014

ATTENDANCE SIGN-IN

Go BEYOND - Be Kind

Be kind to yourself by having a healthy work-life-balance.

What are some things we can do to balance our personal and professional lives?

Possible answers:

Get enough sleep, healthy eating, exercising, setting boundaries, minimizing work distractions during personal time)

JOB SPECIFIC INFO

Interactive Cleaning Process: (continued)

We've been discussing interactive cleaning. Today's step is...

Step 3: Smile

"The cost of a smile has never gone up and the value has never gone down." Brighten your patient's day with direct eye contact and a smile. A having a smile on your face can lift someone's spirits. Keep in mind that yours could be the only genuine smile they see all day.

RESULTS & RECOGNITION

Service Recognition: _____

Special Occasions: _____

NOTES FOR THE TODAY

HCAHPS/PRC SCORES

EVS _____ FOOD _____

SAFETY MOMENT

Oxygen Safety

FUN FACT

The first man to swim the length of Great Britain grew a beard to stop jellyfish from stinging his face.

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Figure 12

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Examples of Senior Executive Activities to Activate Middle Managers During Times of Change

Category	Communicate Why	Model the Desired Behaviors	Overcome Obstacles
1) Involve Middle Managers in Shaping the Change	Record an introductory video message targeted at middle managers introducing the change vision and the rationale behind it	Direct members of your executive team to review change vision with middle managers and report back important feedback to the group	During review of proposed change plan, ensure team has included activities to hear from middle managers throughout change design and roll-out
2) Engage Middle Managers in Goal Setting	In targeted communication to middle managers, address how their advancement opportunities align with what's required for the change initiative's success	Review what each of your direct reports are doing to ensure middle managers are engaged in goal setting	Look for members of your executive team that are not engaging middle managers in goal setting
3) Train Middle Managers on Key Skills	Get time on the agenda of formal leadership training sessions to personally address attendees	Check-in with direct reports regarding percentage of their middle managers who have attended change-related training	During any office/site visits, check-in with a few middle managers to ask how prepared they feel based on change-related training
4) Provide Middle Managers with Tools to Engage their Teams	Incorporate change success stories from across the company into your change-related communications to employees	Write personal letters recognizing middle managers whose teams are demonstrating success delivering on change vision	Challenge your direct reports to identify policies or processes that make it hard for employees to demonstrate desired behaviors
5) Connect Middle Managers with Customers	Include customer feedback, like survey comments, in your company-wide communications to demonstrate where change efforts are or are not yet impacting customer perceptions	Encourage your executive team to create chances for middle managers to interact directly with customers by hosting customer panels or including them on customer visits	Support budget requests that provide middle managers role-relevant access to customer metrics and open-ended feedback to use with their teams

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Figure 13

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