



**INSIGHT REPORT**

# **Engaging a Tethered Workforce**

**BEST PRACTICES FOR ENGAGING NON-EMPLOYEES TO  
DELIVER DESIRED CUSTOMER EXPERIENCES**

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## EXECUTIVE SUMMARY

Companies across a number of industries create and deliver customer experiences (CX) through a combination of traditional employees and other workers who they do not directly control – such as contractors or employees of channel partners or outsourcing partners. Despite not being directly employed by the company, these other workers – who make up what Temkin Group calls a “tethered workforce” – still play a critical role in delivering experiences that represent the company’s brand. However, tethered workers differ from typical full-time, corporate employees in ways that pose challenges to brands’ efforts to align these workers with their customer experience goals and objectives. In this report, we examine how brands are tapping into these tethered employees. Here are some highlights:

- Companies must manage three connections: 1) Between themselves and their partners that employ the tethered workers, 2) Between their partners and the tethered employees, and 3) Between themselves and the tethered workers.
- We share over 30 examples of best practices from across Temkin Group’s *Five I’s of Employee Engagement*: Inform, Inspire, Instruct, Involve, and Incent.
- We offer brands a blueprint for engaging tethered workers with key things to think about across the three connections of tethered workforces.

## DELIVERING EXPERIENCES THROUGH NON-EMPLOYEES IS CHALLENGING

Many companies deliver portions of their experience to end customers through workers who are not their direct employees, such as employees of channel or outsourcing partners or independent agents. To create great customer experience (CX) in these situations, brands must work through this group of individuals, which Temkin Group calls a “tethered workforce.” We define a “tethered workforce” as:

*Individuals who end customers view as representatives of the brand, despite not being directly employed by the brand.*

Tethered workers are set apart from direct employees by more than just different administrative and regulatory conditions. They differ in other significant ways as well, and these distinctions can make workers feel detached from, rather than affiliated with, the brands they represent. Unlike direct employees, tethered workers (see Figure 1):

- **Have different employers.** Tethered workers are regularly exposed to their own employer’s culture, rather than to the culture of the brand, and their day-to-day activities are governed by the company that “signs their paycheck.” As a result, these workers feel a stronger affiliation with their employer than with the brand they represent...and they behave accordingly.

- **Lack a direct connection.** Tethered workers may have little or no direct exposure to the values and culture of the brand they represent. Without such exposure, tethered workers will struggle to connect what they do on a daily basis to how their work impacts the brand's mission or success, ultimately limiting their discretionary effort and commitment.
- **Are pushed for compliance.** At times, companies will use tethered workers to reduce costs or raise productivity in a portion of their brand's experience. Consequently, these workers are primarily managed by and rewarded for following tightly defined processes and achieving productivity metrics – not for demonstrating behaviors that deliver a positive customer experience.
- **Are less empowered.** Despite being viewed by end customers as part of the brand, brands often hamper the efforts of tethered workers by creating boundaries around what they know or what they can do. As a result, tethered workers often have less access to information, lower empowerment in decision-making, fewer permissions to make exceptions, and more limited recognition by the brand compared with the brand's direct employees.

## BRANDS AND THEIR PARTNERS NEED TO ENGAGE TETHERED WORKERS

Regardless of who employs them, engaged individuals are valuable assets for any company as they fuel what Temkin Group calls an *Employee Engagement Virtuous Cycle* (see Figures 2 and 3). To understand how brands looking to deliver a great CX can work with their partners to engage their tethered workforce, we interviewed a number of companies that are putting attention on this area.<sup>1</sup> Our research uncovered a variety of ways that brands and their partners are applying what we call the *Five I's of Employee Engagement* (see Figure 4).

When a brand uses tethered workers, it doesn't wholly control who is delivering its customer experience. This means that in order to provide the desired experience to all customers, a brand has to recognize the entire system of elements influencing how those tethered workers understand what's expected and ultimately behave on the job. To understand this whole system, the brand must focus on three distinct connections (see Figures 5 and 6).

- 1. Brand and Channel or Outsourcing Partner: Collaborate for Success.** Brands must ensure that the organizations responsible for employing their tethered workers desire the same customer experience as they do. The two organizations must also understand what success looks like for each entity, must mutually define goals and expectations, and must clearly identify what's required of both parties.
- 2. Partner and Tethered Workers: Balance Interests.** A brand must understand and influence the relationship between its partners and their employees, the "tethered workforce." The brand's business partner must make sure that its employees, these tethered workers, connect to the brands they represent while creating a positive, supportive working environment.

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<sup>1</sup> Companies interviewed for this report include Asurion, John Deere, MetLife, Oxford Properties, Safeco, SunPower, Sykes, The Results Companies, TouchPoint Services, and WorkXO.

- 3. Brand and Tethered Workers: Forge Attachment.** There are times when a brand can directly connect with its tethered workers. In these instances, the brand can be more hands-on in how it aligns tethered workers with its desired customer experience. Brands must foster within these workers a real affiliation with their brand culture and their CX, so the workers can demonstrate them through interactions with end customers.

## #1 Brand and Channel or Outsourcing Partner: Collaborate for Success

When brands engage channel or outsourcing partners to deliver part of their customer experience, they must start by creating a shared vision of the desired customer experience and what's required for success. This process involves the brand and its partner defining what each wants and what is possible, agreeing on measures of success, and identifying how to enable tethered workers to deliver what's expected. Here are examples of how brands and partners can collaborate for success:

- **Align expectations.** Brands and their outsourcing or channel partners can't deliver a consistent customer experience – together or independently – when their expectations are not in sync. At the start of new engagements, Sykes, a provider of customer contact management solutions, works with clients to understand their customer experience goals, their cost goals, and how goals and experiences may differ by customer segments. But their collaboration doesn't stop there. At its client advisory board's suggestion, Sykes also takes a closer look at how exactly its tethered workers fit into its clients' CX journey. With Sykes' workers more fully understanding their place in the customers' journeys and the ways they can help customers prepare for next steps, tethered workers are better positioned to advocate for customers and support the brand's CX goals. Sykes also holds quality calibration sessions with its brand clients, which helps aligns the two organizations as they work together to define what "good" calls should sound like by using existing calls to identify exemplars. TouchPoint Support Services, which provides tethered workers in a variety of roles to hospitals and senior living facilities, participates in its main client's patient and family engagement steering committee. Being involved in this committee helps TouchPoint stay aligned with its client's highest-level goals and enables it to support the committee's initiatives through its tethered workforce on an ongoing basis.
- **Diagnose performance together.** All businesses periodically run into problems, so it's critical for the brand and its partner to diagnose and tackle customer or worker problems together. As part of its efforts to get its dealer partners to adopt the practices of its *Customer First!* program, SunPower offers them onsite consulting services. Most of these small businesses would not normally have access to the expertise that SunPower can provide around enhancing customer experience, simplifying processes, and improving employee effectiveness. During these engagements, teams of two to four SunPower employees go to a dealer partner site and spend two days observing what the partner and its workers do. They then offer ideas and best practices, emphasizing the tangible link between CX and business results. MetLife conducts regular operational reviews with its outsourcing partners based on internal metrics and customer data. During these operational reviews, participants listen to calls, review feedback, explore why issues may be happening, and identify root causes, which are all done in a similar manner to how MetLife carries out reviews internally. And to help improve their performance on a daily basis, MetLife

gives tethered workers access to its systems, materials, and knowledge guides about how to handle different questions and situations.

- **Test processes and make adjustments.** Brands should tap into their partners' experience and capabilities to identify ongoing opportunities for improving customer experience. For instance, a global technology support and service company, is able to analyze feedback directly from end customers and identify potential issues that cause customer hardship. Many of these issues originate with its client brands. When issues are uncovered, the company raises the issue with the client and makes recommendations about how to mitigate the issue or handle the interaction differently. And before it makes a final decision with the brand about how exactly to handle customer interactions going forward, the support and service company conducts A/B testing to compare alternate recommendations in order to see if one will outperform the other.
- **Encourage best practice sharing.** Both brands and partners should look for ways to identify and share best practices across organizational boundaries. John Deere uses a global network of dealer partners to distribute its agriculture and turf products. One of the ways John Deere helps these dealers to understand and improve their customer experience is by capturing and sharing best practices about how workers handle certain customer interactions – from relationship-building call cadences to issue resolution. Deere gathers best practices from across dealers and compiles them into *playbooks* to help dealers' post-sales interactions. John Deere's CX team also participates at various dealer meetings. During these meetings, the team offers educational sessions on CX and hosts a booth where individual dealers can stop by to ask questions. Finally, Deere engages its own field staff, who work directly with dealers on a regular basis, in a *CX community of practice*. In the community, the focus is on understanding what the field staff are doing with their dealers and what dealers are asking for, along with keeping field staff knowledgeable on CX tools and processes to share with their dealer counterparts. It also serves as a way for the CX team to continue to learn about best practices that are emerging from the dealers around the world. The Results Companies hosts an annual *Partnership for Performance Excellence* conference – a forum that brings together customer experience leaders from the different brands it represents so they can interact with each other to learn and exchange views on critical CX and brand engagement topics.<sup>2</sup>
- **Enlist partners as CX advocates.** Just as internal employees can engage and influence their coworkers, partners can help a brand extend its reach and evangelize the CX strategy to other partners and to the tethered workers they employ. That's why brands should create a Partner CX Advocacy Program (see Figure 7). Safeco, a Liberty Mutual Insurance Company, has enlisted leaders from some of its engaged agencies to participate in half-day sessions with other agency leaders to show that improving CX is not just about competition, but about collaboration. In another example, the district managers of one hospitality company coached the managers at each franchised property. They helped managers become champions at their own locations on how to change the internal view of the voice of customer program from "having a 'scoreboard mentality'" to embracing a broader view of CX. This coaching helped champions at each property shift focus away from the numbers and towards the

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<sup>2</sup> See Temkin Group Insight Report, "Lessons in CX Excellence, 2016" (January 2016).

amount of feedback coming in and the actions that workers at each property can take to close the loop. These champions then lead their own daily huddles at each property to discuss what its workers learned from customer feedback and what they can do differently to improve CX at their locations.<sup>3</sup>

## **#2 Partner and Tethered Workers: Balance Interests**

It's impossible to achieve either customer experience or employee engagement success if tethered workers don't identify with both the company that employs them and the brand they represent to customers. If a partner doesn't balance its own employee engagement efforts with its clients' engagement efforts, it risks losing its skilled reliable workers to other companies because of disengagement and losing its clients to competitors because its tethered workers don't effectively represent the brands to end customers. To understand how organizations can effectively balance these interests, we looked at three companies' efforts in this area (see Figure 8):

- **TouchPoint Support Services.** TouchPoint strives to help its workers understand both the relationship between itself and the hospitals where they provide services and the tradition of caring and service they are upholding. Tethered workers begin learning about this relationship early on as they attend the hospital's new hire orientation alongside the employees who have been directly hired by the hospital. TouchPoint follows that session with its own orientation, which addresses how its own mission, values, and *Go BEYOND service standards* supplement those of the hospitals where the workers are located. To reinforce its mission and service standards over time, TouchPoint actively applies the feedback it receives from federal surveys, third-party patient surveys, and from patients during managers' rounds each day. In particular, supervisors and managers strive to uncover any positive experiences patients have had and then use those interactions to recognize and coach workers. TouchPoint shares survey results and other feedback with workers on "back of the house" bulletin boards, and this feedback is taken into account for formal recognition programs and is discussed during daily line-up meetings. Supervisors also use this feedback to identify associates who might be less proficient in a certain area and pair them up with stronger peers who can share their ideas about what works on the job. And TouchPoint not only recognizes high-performing workers around their peers at the company, it also recognizes them at the nurses' station on their assigned floors, celebrating their accomplishments with the hospital staff who work alongside these individuals every day. TouchPoint reinforces the importance of individual workers through *Stay Conversations*, during which supervisors spend time one-on-one with tethered workers to understand what's working well for them, what they are happy with, what they might like to do differently, and how the company can support their goals. And because it knows its middle managers are essential to its success, TouchPoint has created a three-part training program for those individuals who manage its tethered workforce inside healthcare facilities (see Figure 9). This program includes new supervisor training, presentations by the CEO, and skills for employee retention.
- **Sykes.** Listening to employee feedback and taking action on that feedback plays an essential role in both employee engagement and CX success (see Figure 10). Sykes

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<sup>3</sup> See Temkin Group Insight Report, "The Secret to B2B2C Customer Experience Success" (December 2014).

measures how engaged its workers feel with both itself as a company and with the brand they represent. For both organizations, Sykes asks workers whether they are proud to work for them, how satisfied they would be if they were a customer, and whether they believe in the mission of the company. Sykes uses workers' feedback internally, and it shares it with clients so they can either reaffirm the effectiveness of their efforts to date or can identify problems that need to be addressed. Sykes' company leaders also recognize that individual workers can deliver a lot of value back to the organization through their ideas and their ingenuity. It gathers workers from across roles, business lines, and geographies together onto three councils – a *People Council*, an *Operations Council*, and a *Client Council*. These councils help identify and standardize best practices created by individual workers. Uncovering these best practices enables Sykes to institute them more broadly, which helps differentiate its services. The company has also created an online *Innovation Inventory* where it collects stories and where individuals share how they are tactically innovating in order to spread ideas to other areas of the company. For example, as social media support has grown, Sykes has been able to generate a portfolio of best practices that help workers across the organization manage and deliver services over social channels to customers.

- **Global Technology Support and Service Company.** This organization that provides outsourced services recognizes that the clients it partners with can only be successful if its workers have a clear picture of how their efforts contribute to that success. Consequently, it educates its workers about how they impact its primary measure of CX success – Net Promoter Score® (NPS). The organization stresses the importance of taking good care of customers to its workers, and it reviews the key drivers that support NPS and call quality in the eyes of customers. Tethered workers in frontline roles have direct visibility to the NPS score and see quality verbatim comments, accompanied by call recordings, from their interactions. During quality reviews, the reviewer highlights behaviors the worker exhibited that are known to improve a customer's likelihood to recommend and helps the worker understand which behaviors are likely to create detractors. When the organization needs to change worker behaviors, it uses *closed-loop training programs* to ensure that those changes will improve results for customers. During a closed-loop training program, a pilot class of workers participates in training on the behavior change, and their progress is monitored for 18 weeks through call listening, NPS performance, and verbatim reviews. Operations, client management, and curriculum development representatives all work together to evaluate the effectiveness of this training compared to other classes, and then they make adjustments as needed. The organization recognizes the workers who deliver exceptional customer experiences through the *Take the Cape Award*. The CX team helps nominate workers for the award based on customer feedback that specifically cites individuals who went above and beyond. To bring this focus on customer success full circle, it ensures that employees are able to share their own input about how they see things working with management across multiple levels. So, for example, supervisors hold *brown bag sessions* with team members, site directors will hold worker *focus groups*, and the company's SVP of Operations conducts *skip-level meetings*. Each of these programs is designed to explore how the organization can make life better for the customers from the workers' points of view.

### #3 Brand and Tethered Workers: Forge Attachment

While a tethered worker will never be as attached to a brand as the brand's own employees, there are things a brand can do to keep the differences as small as possible. To forge attachments with its tethered workers, brands should:

- **Bring the brand to life.** Tethered workers are more likely to empathize with customers and do their best for the brand they represent when they truly feel like part of the brand. A global technology company engages the highly skilled tethered workers who help it provide customer support by giving them full access both to the company's body of knowledge and to subject matter experts inside the company. In addition to having access to information, its tethered workers also enjoy access to an onsite lab, which includes company equipment that allows them to simulate customer technology issues. Furthermore, the company created a training academy for these tethered workers, which emulates the growth and development path of support engineers who work directly for the company. The company also encourages tethered workers to develop their skills and recognizes them for their accomplishments. These efforts have greatly increased the retention rate for these tethered workers. One large credit card company relies on thousands of tethered workers to help its customers, so it invested significant time and energy into describing and communicating its customer experience mantra and service principles to them. To effectively relay these values, the company spent 12 months on a campaign with both employees and tethered workers, and at the end of it, it developed a core set of behaviors focused on ensuring that the experience felt the same to customers regardless of location. This campaign – which included a series of communications, training programs, new hire orientation, stand-up meetings, and performance reviews – impacted everyone in the company, from its corporate executives to frontline tethered workers.
- **Create interactive learning opportunities and tools.** To ensure an excellent customer experience at each of the properties it manages, Oxford Properties defined its *Oxford Commitment*, which it embeds throughout its training for both direct employees and tethered workers (see Figure 11). To empower local teams to consistently deliver on this commitment, the company turned to site employees and tethered contract workers for input about which topics would help them deliver excellent experiences. This gave birth to the *Dialogue Series* – a set of guided, interactive conversations designed to get individuals to think, learn, ask, and share their points of view (see Figure 12). Oxford holds *Series*' sessions at each location, and tethered workers participate alongside direct employees. Attendees learn why customer service is key to Oxford's success, they offer input on customers' needs, and they think about their unique and specific roles in delivering the *Oxford Commitment*. These live sessions have also been converted into an eLearning program and have been adapted into a shorter live program called *Dialogue Series Revisited*. Each eLearning module allows new hires to quickly get up to speed on the basics, while the *Revisited* sessions bring new workers together for two-hour interactive sessions that dive deeper into the content of the *Dialogue Series*. To keep the major takeaways from these sessions in front of workers, Oxford provides a *Customer Service Pledge* card – available in four languages – that summarizes the *Oxford Commitment*, important conclusions from the *Dialogue Series*, and behavior guidelines for critical customer interactions, such as a slip and fall, theft of personal

property, or elevator entrapment, which were actually co-defined by Oxford employees and tethered workers.

- **Empower with information.** A brand shouldn't just rely on its partners to develop their own customer feedback process; rather, it should actively support their partners' efforts by collecting information about how tethered workers make a difference in customer loyalty. John Deere has developed a universal set of guidelines describing the key drivers of a good customer experience during the sales and service interactions that tethered workers deliver at dealerships. When the company researched the connection between the customer's experience at a dealership and market share (the dealer's primary financial metric), it found that by optimizing these drivers, a dealer positively impacts its market share. John Deere links all of these key CX drivers back to dealer processes and then measures these drivers on a regular basis. And to help them improve these drivers, John Deere provides its dealers with a web portal that allows workers to track performance and manage their own closed-loop feedback program. The portal also includes results from reports that link feedback areas to dealership processes, identifying which processes are performing well and which need attention. Dealers control which tethered workers within their operation can view the portal. Many dealers have identified an internal champion who is responsible for engaging a cross-functional team (sales, service, parts) in discussions about these results and determining the best course of action based on the feedback.<sup>4</sup>
- **Involve tethered workers in issue management.** Sometimes brands receive feedback from end customers that should be handled by the workers employed by its partners. SunPower has tethered workers known as *CX Champions* within dealers, and they receive real-time alerts on customer feedback. These champions help handle a variety of issues – whether they arise during the sales process or during or after installation of SunPower's solar energy equipment. Within each of these real-time alerts, SunPower includes prompts that guide these champions towards the best course of actions to take during the customer follow-up. These alerts are also accompanied by links to related training programs that address the CX weaknesses the customer has identified. When feedback from John Deere's customers indicates a problem at a dealer, the company can assign workers at the dealership involved to handle the problem. Since issue resolution is a significant driver of customer loyalty, it's important for the workers closest to the customer and best equipped to fix the issue be involved. If a problem doesn't get solved at the dealer level, then John Deere's customer support managers can step and help get the experience back on track.
- **Celebrate workers and employees equally.** Brands need to reward and reinforce the behaviors they want to see from tethered workers (see Figure 13). Oxford Properties encourages local branches to recognize and celebrate the successes of both employees and tethered workers. The company commends these individuals by sharing their success stories at monthly meetings or at lunch and dinner award celebrations. At many sites, either Oxford employees or its tethered workers are eligible to win "employee of the month" awards or other locally branded recognition programs, such as *Caught in the Act*. To increase the number of workers and employees recognized, Oxford encourages property tenants with elevator screens

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<sup>4</sup> See Temkin Group Insight Report, "The Secret to B2B2C Customer Experience Success" (December 2014).

and building posters to share feedback about any individual working onsite. Any time Oxford receives a written communication recognizing either a tethered worker or an employee, it frames it and hangs it on a local “wall of fame.” Many of the hospitals that use tethered workers from TouchPoint include those workers alongside their own employees in rewards programs and celebrations. The hospitals will nominate these workers for monthly service awards and highlight them in hospital newsletters. Hospital leaders keep TouchPoint informed about the tethered workers who go above and beyond, so TouchPoint can recognize them as well. A large telecommunications company included tethered workers in cross-selling promotions and awarded those who did well salesperson of the day or week. As part of its recognition efforts, it used one of its own twitter accounts to highlight employees and workers across different sites, and it encouraged individuals to follow each to learn about their success stories.

- **Extend product launch communications.** Brands often spend a lot of time and energy making sure that employees are on board with the launch of new products. However, it is equally important for brands to earn buy-in from the tethered workers employed by their partners. When crafting critical customer-facing communications, a manufacturer might give a selection of its partners’ tethered workers – those who provide product support – the opportunity to preview and comment on the communications at the same time they give internal teams a sneak peek. When an insurance carrier introduces a new customer portal on its website, it can offer the same training to its independent agents as it offers to its frontline employees. And when company leaders convene an online town hall meeting to communicate critical updates about new products or services, it should encourage the tethered workers of its top partners to watch the session as well.<sup>5</sup>

## A BLUEPRINT FOR ENGAGING TETHERED WORKERS

As companies move towards delivering their customer experience through tethered workers, they must extend their employee engagement efforts to include these workers. Here are our recommendations for what brands absolutely must do across the *Five I’s of Employee Engagement* to engage their tethered workers (see Figure 14):

- **Inform.** If a brand wants workers to be committed to the goals of its organization, it must make sure they understand what these goals are and how they are expected to achieve them. At a minimum, a brand must deliver and reinforce messages about why its customer experience is important, what success looks like, and the role each worker plays in creating that success.
- **Inspire.** The purpose and values of an organization can provide powerful inspiration to employees, both in how they act on the job and the meaning each personally finds in his or her work. A brand needs to share its values with tethered workers and help them understand the specific behaviors required to demonstrate those values to customers.
- **Instruct.** Employees need to feel that they have the knowledge and tools to be successful – this is a fundamental driver of employee engagement. A brand needs to provide training to tethered workers – directly or through its partners – so they

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<sup>5</sup> See Temkin Group Insight Report, “The Secret to B2B2C Customer Experience Success” (December 2014).

understand its products and services, its policies and procedures, and what “good” customer interactions look and sound like.

- **Involve.** If a company really values employee engagement, it should be gathering employee feedback and prioritizing taking action on its findings. Even if early efforts are informal and simple, a brand should periodically solicit feedback from tethered workers on what they are hearing from customers about their experiences.
- **Incent.** One of Temkin Group’s *Six Laws of Customer Experience* states that employees do what is measured, incented, and celebrated. A brand needs to define meaningful performance measures for tethered workers, and these measures need to align with its goals and reinforce desired behaviors.

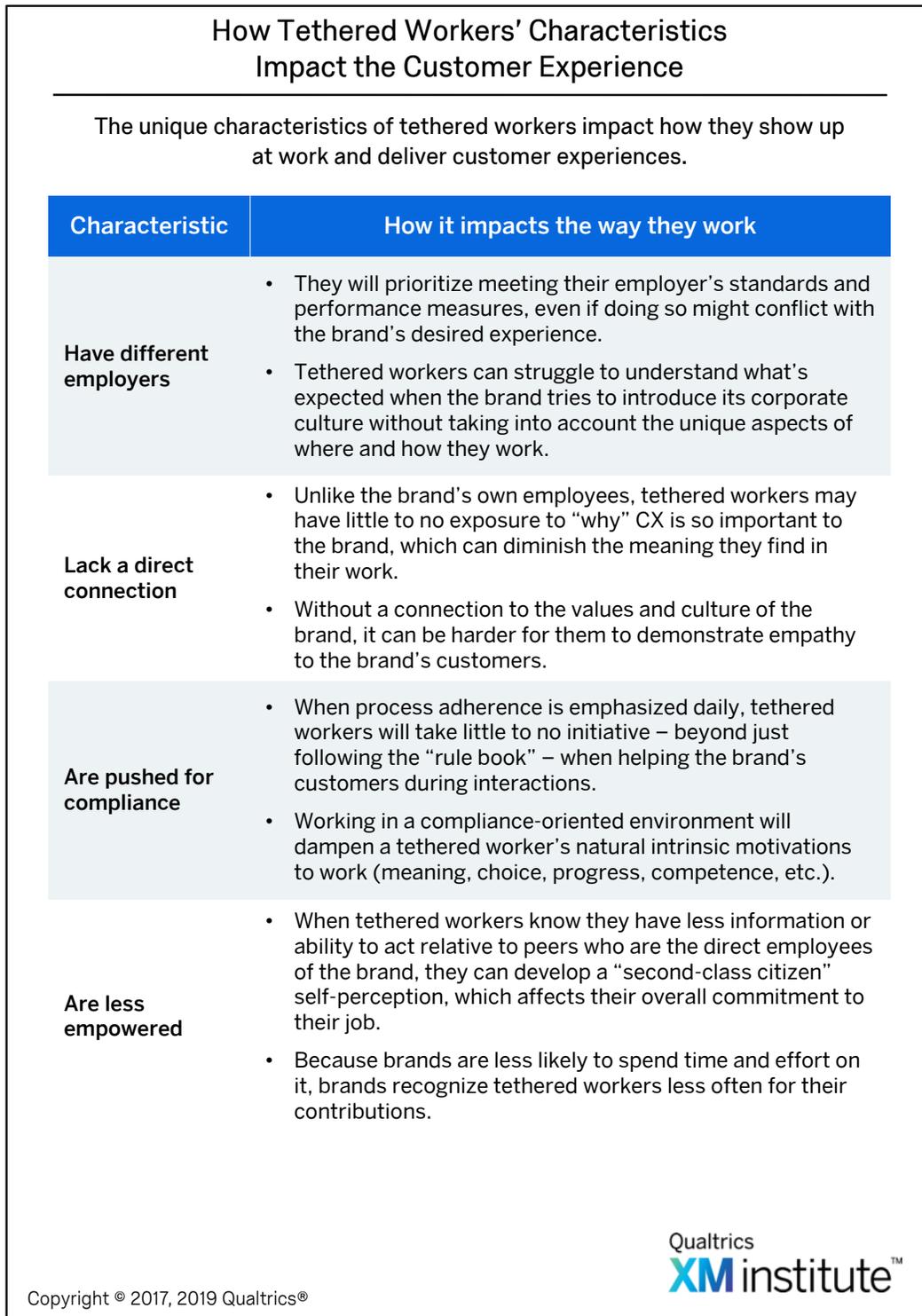


Figure 1

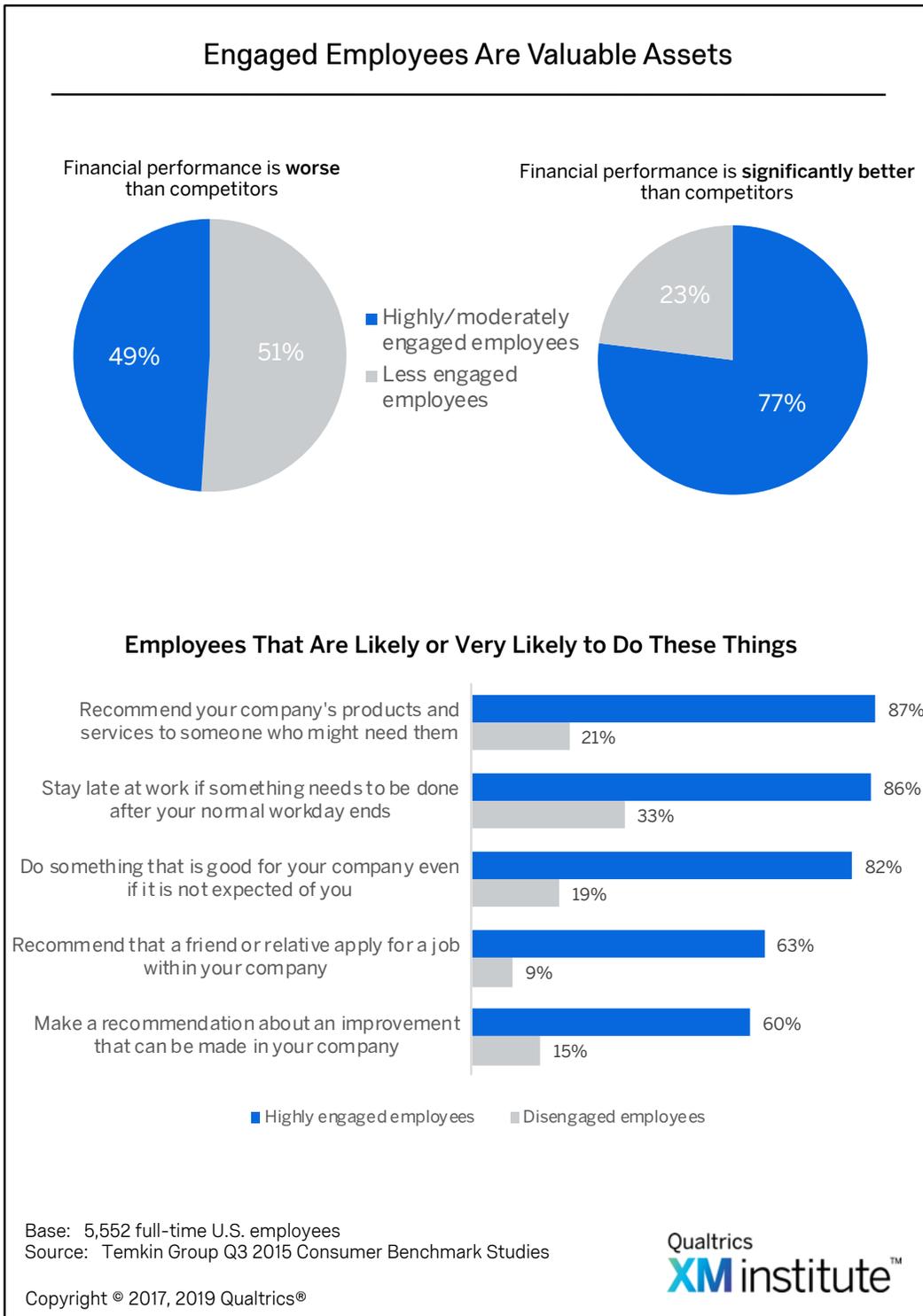


Figure 2

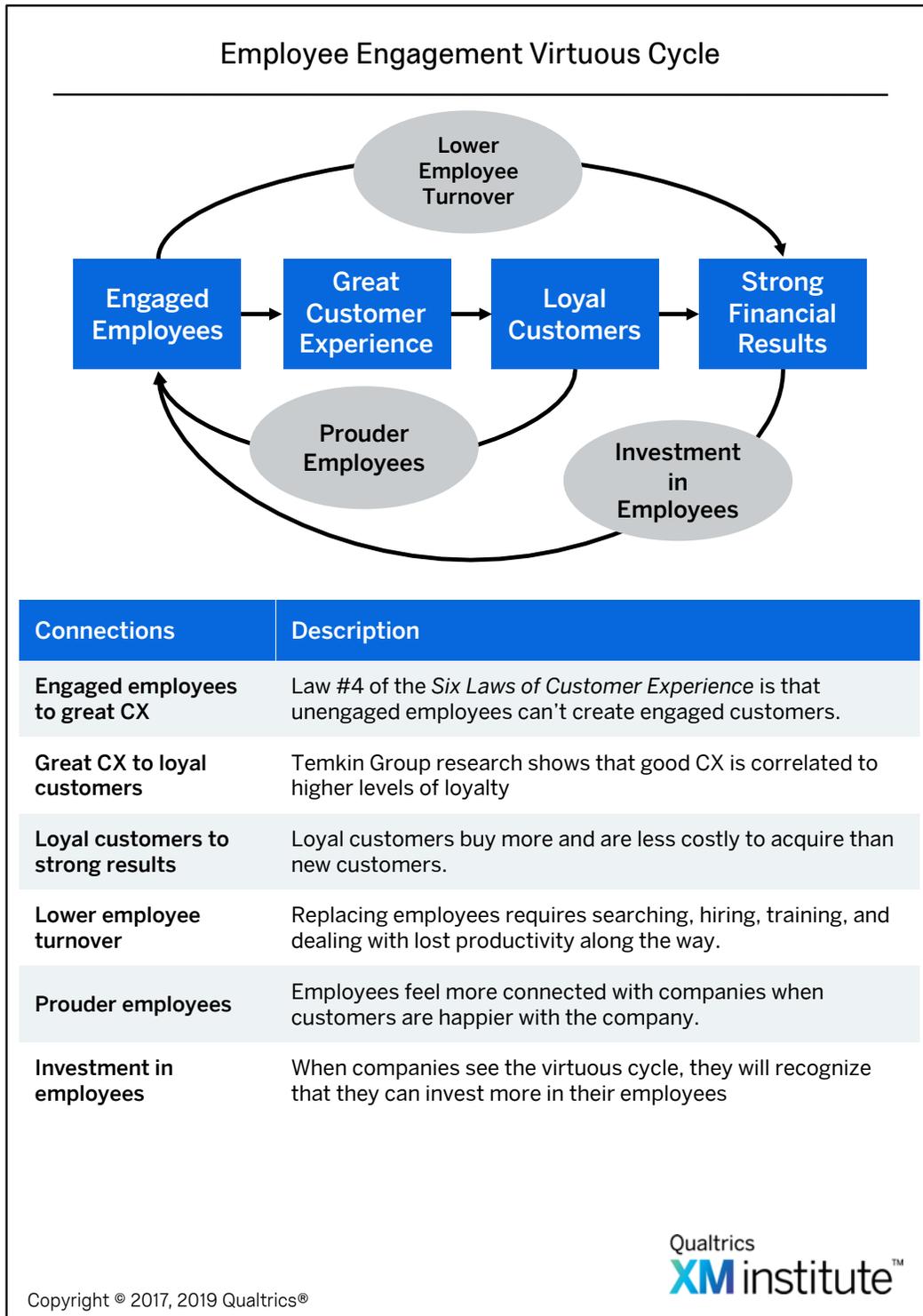


Figure 1

## How Characteristics of Tethered Workers Can Be Mitigated by the *Five I's of Employee Engagement*

### **Inform**

*Provide employees with the information they need to understand what's expected*

- **Have different employers:** Brands and their partners must work together to be sure that the information tethered workers receive from either entity is complementary rather than conflicting.
- **Lack a direct connection:** In addition to sharing practical information about what tethered workers are expected to do, include messaging about the culture and values of the brand they represent.
- **Are less empowered:** Regularly share customer feedback with tethered workers to illustrate how their efforts impact the customer's overall journey with the brand.

### **Inspire**

*Connect employees to the organization's vision and values*

- **Lack a direct connection:** Use stories to inspire tethered workers with how their day-to-day actions make a difference to the customers they serve (and to their coworkers and company they work for).
- **Are pushed for compliance:** Balance compliance messages with messages and other actions that demonstrate how important tethered workers' efforts are to overall success.

### **Instruct**

*Support employees with the training, coaching, and feedback they need to be successful*

- **Lack a direct connection:** During onboarding, emphasize company values and mission alongside benefits, administrative requirements, and technical job training.
- **Are pushed for compliance:** Supplement basic training with on-the-job coaching and development which can accelerate tethered workers' capabilities, allowing them to extend how they serve customers.
- **Are less empowered:** Partners should "train" brands to understand and take full advantage of tethered workers' skills and capabilities and on best practices for delivering experiences through tethered workers.

### **Involve**

*Take action with employees to improve processes and solve problems*

- **Have different employers:** Partners should measure employee engagement with both themselves and with the brand that workers represent, then use these findings to diagnose and design an employee experience that supports the goals of both the partner and the brand.
- **Lack a direct connection:** Invite tethered workers to make a personal commitment about how they will live out the brand's values during interactions with customers.
- **Are less empowered:** Seek input from tethered workers – who are closest to what's happening with customers – about what gets in the way of delivering a great customer experience and how to improve.

### **Incent**

*Deploy appropriate systems to measure, reward, and reinforce desired behaviors*

- **Have different employers:** Identify any conflicts or gaps between what tethered workers are expected to do on behalf of the brand and how their performance is measured and incented.
- **Are pushed for compliance:** Celebrate individuals and teams who demonstrate desired CX behaviors above and beyond the basic requirements with formal and informal rewards and recognition.

Also see: Temkin Group report *The Five I's of Employee Engagement*  
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Figure 4

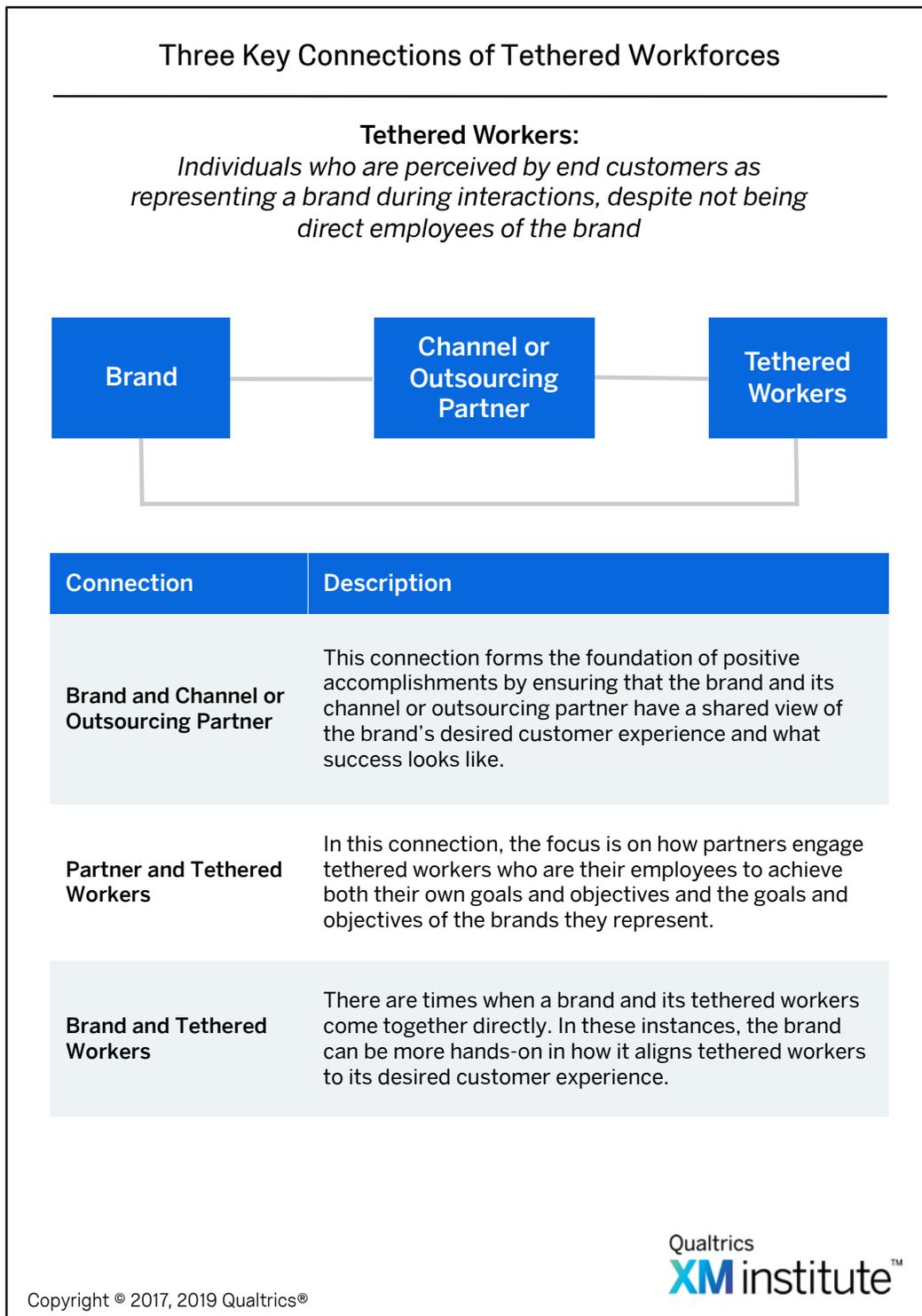


Figure 5

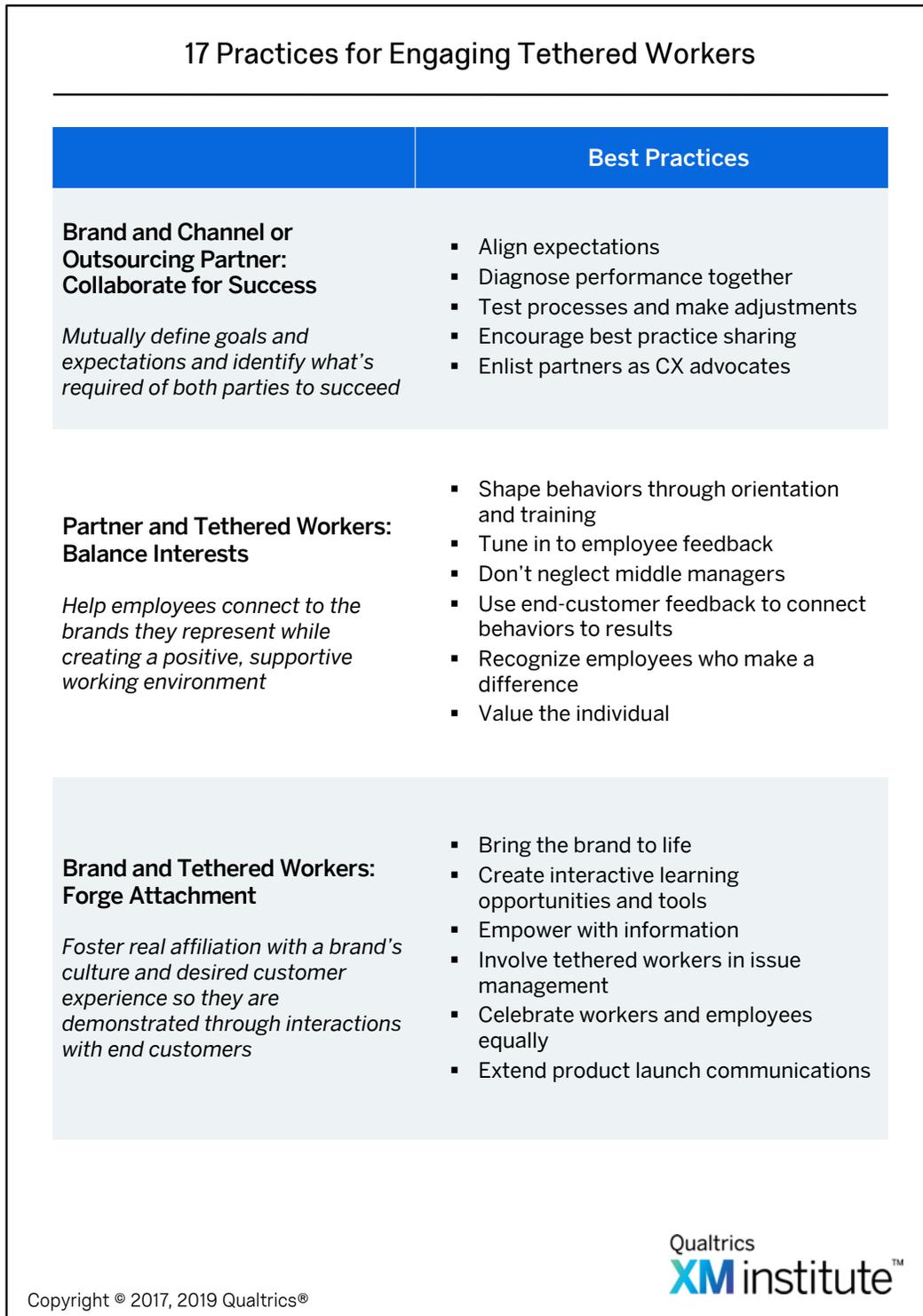


Figure 6

## How Partner CX Advocacy Programs Can Help

As CX advocates, partners can evangelize a brand's CX strategy and extend its reach with other partners and the tethered workers they employ.

Target Audience	Partner CX Advocates Can:
<b>Other Partners</b>	<ul style="list-style-type: none"> <li>▪ Participate in company's CX pilot/beta programs and build a case to help bring others onboard</li> <li>▪ Talk about elements of CX program in language and terms that are meaningful to other partners</li> <li>▪ Share success stories at partner gatherings/events</li> <li>▪ Contribute to partner testimonials on the value of participating in a CX program to drive business results</li> <li>▪ Share best practices with other partners to cross-pollinate ideas and approaches on an on-going basis</li> <li>▪ Identify opportunities for improvement and amplify Voice of the Partner back to the company</li> </ul>
<b>Partner's Employees (Brand's Tethered Workers)</b>	<ul style="list-style-type: none"> <li>▪ Model desired CX behaviors</li> <li>▪ Proactively communicate internal CX updates and progress reports</li> <li>▪ Lead daily huddles across the organization to discuss lessons learned from customer feedback and how to change</li> <li>▪ Encourage workers to shift perceptions from "fear of failure" to "empowered to help customers"</li> <li>▪ Deliver training to connect CX goals and objectives to daily actions</li> <li>▪ Initiate and support customer-centric programs at a local level</li> <li>▪ Drive internal recognition efforts tailored to organization's needs and culture</li> <li>▪ Share feedback on efforts back to brand</li> </ul>

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Figure 7

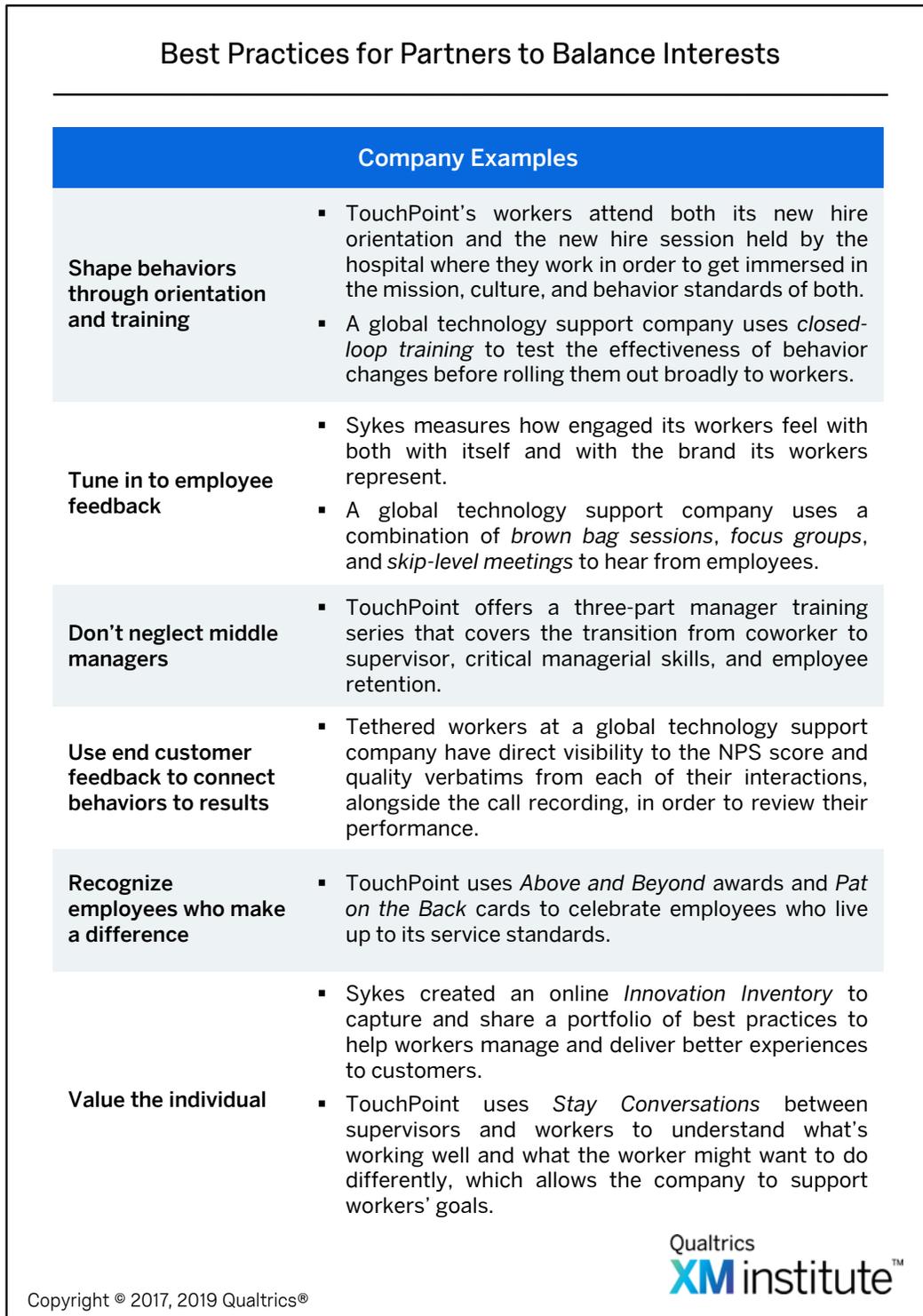


Figure 8

Select TouchPoint Support Services Manager Training			
Program	Primary Objective	Delivery	Additional Details
<b><i>Leadership Fundamentals Supervisor Training</i></b>	Leadership development to transition top performers from "do-er" to supervisor	Six modules	<ul style="list-style-type: none"> <li>Modules delivered by members of customer experience team, as well as participation by the CEO</li> <li>Participants are encouraged to put new skills into practice after each session</li> <li>Focuses on key skills including conflict management, delegation, and dealing with difficult employees</li> </ul>
<b>New Manager Orientation</b>	Acclimate new managers to TouchPoint Support Services Culture in the context of their new role	3-day session held monthly at company headquarters	<ul style="list-style-type: none"> <li>Concentration on company values, <i>Top of Mind</i> business objectives, and other operations training delivered by CEO, Sr. VPs, and regional VPs</li> <li>Emphasis on fostering collaboration includes meeting every leader at the HQ</li> </ul>
<b><i>Love 'Em or Lose 'Em (LELE) Training</i></b>	Reinforce the importance of employee engagement and retention	Included in New Manager Orientation	<ul style="list-style-type: none"> <li>Introduces 26 engagement strategies for employee retention</li> <li>Also covers front-line supervisory responsibilities</li> <li>Managers across the organization apply these strategies as they strengthen their relationships with associates</li> </ul>

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Figure 9

Channels for Listening to the Voice of the Employee		
Listening Channel	Description	Best Used For
<b>Annual Survey</b>	Combination of closed- and open-ended questions delivered online or paper-based	<ul style="list-style-type: none"> <li>Formal measurement of employee engagement metric and key drivers</li> <li>Efficiently reach large or distributed employee population</li> </ul>
<b>Pulse Survey</b>	<p>Similar to annual survey; typically with fewer questions</p> <p>Administered on quarterly or other periodic basis</p>	<ul style="list-style-type: none"> <li>More frequent monitoring of employee engagement metric and key drivers to spur timelier intervention/action</li> <li>Follow-up within segments of employee base on impact of action plans</li> </ul>
<b>Online Forum Includes Suggestion Box-style Collection</b>	<p>Intranet-based, moderated platform combining company- and employee-generated discussion threads</p> <p>Supplements survey-generated feedback</p>	<ul style="list-style-type: none"> <li>Ongoing collection of employee questions, suggestions, and other feedback on customer or employee experience; either employee-initiated submissions or triggered by company-initiated discussion threads</li> <li>Allows employees to find and engage in communities of interest</li> </ul>
<b>Social Network</b>	A combination of blogs, microblogging, and wikis to capture employee-generated content	<ul style="list-style-type: none"> <li>More dynamic employee-generated content and peer-to-peer sharing</li> <li>Monitoring extended reactions via content ratings, "likes," and reader comments</li> <li>Appealing to social technology-inclined employees to engage their participation</li> </ul>
<b>Employee Council</b>	Group of employees who meet on a regular basis to work on shared interests regarding employee or customer experience	<ul style="list-style-type: none"> <li>Additional employee input on employee survey results and action planning</li> <li>Planning and advocating customer experience improvements at local or company-wide levels</li> </ul>
<b>Ad hoc Listening</b>	Targeted feedback gathering via focus groups, interviews, or private online discussion	<ul style="list-style-type: none"> <li>Digging deeper into understanding an issue from employees' perspectives</li> <li>When time for gathering more insights is limited and scope is focused and well-defined</li> </ul>



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Figure 10

## The Oxford Commitment

### Four Defining Behaviors of Oxford's Culture

1. We stay flexible and are in touch with the needs of our employees, customers, partners, and stakeholders. We relate to people as individuals and are united under a "winning culture."
2. We remain humble and hardworking. We know we must earn people's respect in every interaction, every day.
3. We provide a safe environment for people to take risks and to foster empowerment, innovation, and leadership.
4. We are empathetic and responsive to our customers' needs; and build teams around people who have customer service in their DNA.

### Customer Service Commitments

- **We consistently deliver a world class experience.** We focus on hiring and developing the best people for every job; people who learn, live, and breathe the culture and brand of the organization. That means every one of us delivers exceptional service in everything we do.
- **We earn your respect in every interaction, every day.** Relationships are our most important asset. We go above and beyond to protect and grow them by anticipating needs, being honest and considerate, and valuing customers as genuine partners.
- **We empower our teams to deliver effective solutions fast.** We know problems happen. We listen; we are accessible, creative, and responsive with our solutions; and we act with urgency to make the right decisions.
- **We take great pride in leading the industry.** For over 50 years we have earned our place as leader through innovation, service excellence, and an unrivaled focus on customers. We are committed to that tradition of leadership and to a passion for excellence.
- **We work with purpose.** As OMERS real estate investment entity, we work in the name of 400,000 plus pensioners. We raise the bar in everything we do to deliver on the pension promise and to provide a competitive edge for all of our business partners.

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Figure 11

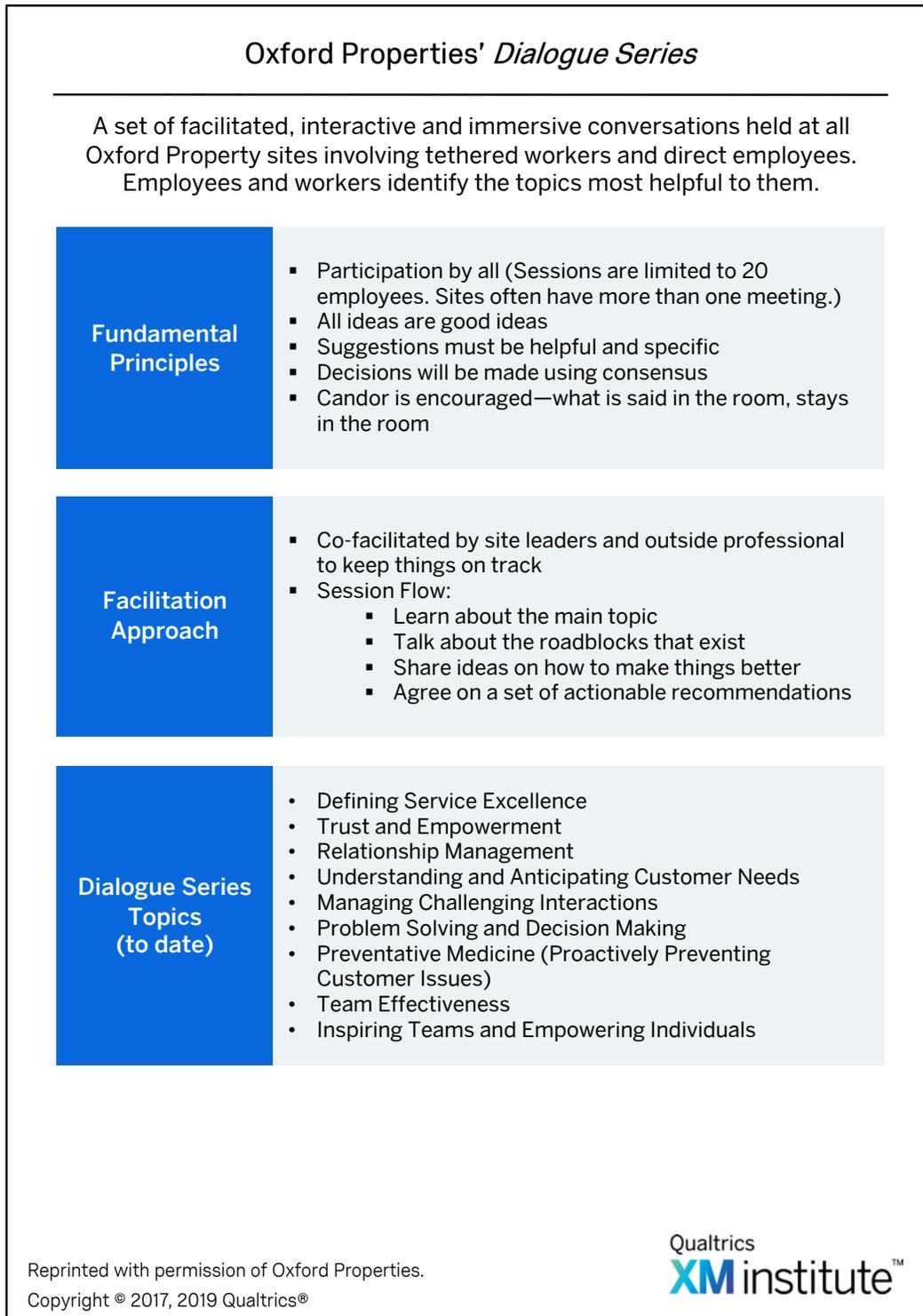


Figure 12

## Recommendations for Designing an Effective Employee Recognition Program

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- **Clearly define “good” behaviors.** Before you can align your rewards and recognition tactics, it’s important to get a clear picture of the behaviors you need from employees. Once the company defines its behaviors, then measures, incentives, and celebrations should be synched up to reinforce those behaviors.
- **Check for mixed messages.** Don’t just introduce new elements to your rewards and recognition program. Review what is already happening and stop or change existing measures and incentives that emphasize less optimal employee behaviors.
- **Create formal CX awards.** Many companies have existing award and incentive programs around sales or quality accomplishments, so it makes sense for CX awards to be formalized as well.
- **Involve peers in recognizing their coworkers.** There’s no reason why recognition only needs to be from the top-down. In fact, peer support and recognition can be a powerful incentive for behavior change. Not only does it generate more “pats on the back,” it helps all employees better understand desired behaviors so that they can spot them in others.
- **Tap into intrinsic motivations.** When it comes to what drives individual behavior, intrinsic motivators – like meaning, progress, and competence – make a difference. For example, personalized, sincere letters or other forms of recognition from senior leaders reinforce the meaning or importance the company places on an employees’ work.
- **Don’t forget to celebrate teams.** Many rewards and recognition programs tend to focus on individual accomplishments, causing companies to overlook an opportunity to recognize teams that collectively demonstrate excellence.

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Figure 13

### Blueprint for Engaging Tethered Workers

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How to think about Temkin Group's *Five I's of Employee Engagement* in relation to the Three Key Connections of Tethered Workforces

	Brand and Channel or Outsourcing Partner: Align for Success	Partner and Tethered Workers: Balance Interests	Brand and Tethered Workers: Forge Attachment
<b>Inform</b>	Be explicit about how the brand thinks about and seeks to deliver a positive CX to end customers	Provide tethered workers with consistent and persistent flow of information about what's important	Create a clear picture for tethered workers of how their work supports the brand's customer experience success
<b>Inspire</b>	Ensure brand values are defined so that employees and tethered workers are delivering consistent experiences	Help tethered workers see how company values complement and support the values and CX goals of the brands they represent	Define brand promises in a way that specifically conveys how tethered workers can keep them with end customers
<b>Instruct</b>	Jointly develop the necessary training and support materials, blending the expertise and experience of the brand and partner into final products	Develop workers' capabilities in both the brand's products, systems, and policies as well as their customer-centric behaviors	Support tethered workers by sharing similar training and knowledge resources with them as are offered internally
<b>Involve</b>	Seek out partner's best practices and advice on how its tethered workers can contribute to brand's CX goals	Tap into tethered workers to better understand their working environment, and their successes and struggles supporting brand's CX efforts	Periodically seek tethered workers' insights and suggestions for improving customer experiences directly from them
<b>Incent</b>	Mutually set performance targets based on proven past performance of partner and brand, then monitor and adjust over time	Actively recognize contributions of tethered workers through partner input on performance or via end-customer feedback	Examine measures and incentives to ensure they support rather than conflict with brand's expected behaviors and outcomes



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Figure 14