

OCTOBER 2020 | QUARTER 4



CX insight

AN EXECS IN THE KNOW PUBLICATION

Hitting Our Stride

How to move forward by
creating effective change.

DIVERSITY, EQUITY, INCLUSION –
A WATERSHED MOMENT
FOR CORPORATE AMERICA

PIVOTING TO REMOTE
ASSESSMENTS AND MANAGEMENT
OF OUTSOURCED PARTNERS

SOLVING THE VIRTUAL
TRAINING, COACHING,
AND MANAGEMENT PUZZLE

CXMB SERIES 2020 CONSUMER EDITION
EXECUTIVE SUMMARY



CX insight

AN EXECS IN THE KNOW PUBLICATION

CX insight Magazine
Issue IV, October 2020

President
Chad McDaniel

Chief Operating Officer
Susan McDaniel

Vice President, Marketing & Communications
Gina Morkel

Director of Content, Communications, and Community
Jim Von Seggern

Execs In The Know Corporate Board

LeAnne Crocker/**Oriental Trading Company, Inc.**, Mike Gathright/**Hilton**,
Jennifer Hanson/**Target**, Paul Brandt/**Loanpal**, Lisa Oswald, **Travelzoo, Inc.**,
Shellie Dow/**Nintendo**, Sue Morris/**GitHub**, Andrew Pine/**Porsche**,
Judi Brenstein/**Groupon**, Michele Watson/formerly with **Indeed**, Brett Frazer/**Sun Basket**,
Ebrahim Hyder/**Michael Kors**, Sally McMahon/**SiriusXM**, Jim Gallagher/**Nordstrom**,
Jared Benesh/**H&R Block**, Alice Sesay Pope/**Visa**, Tim Hickler/**Amazon**

Execs In The Know Partner Board

Phil Gray/**Interactions LLC**, Amit Shankardass/**Teleperformance**, Mike McCarron/**Gladly**,
Kathryn McGavick/**NICE**, Edward Kowalski/**Sutherland**, Jyllene Miller/**Concentrix**



in this issue

05 DIVERSITY, EQUITY, INCLUSION — A WATERSHED MOMENT FOR CORPORATE AMERICA

Employees, Customers, and the World Are
Watching How We Respond

17 PIVOTING TO REMOTE ASSESSMENTS AND MANAGEMENT OF OUTSOURCED PARTNERS

Ensuring Outsourcing Partnerships Are Set
Up for Success

25 SHIFTING CONTACT CENTERS TO WORK-AT-HOME

4 Essential Truths from the Front Lines

29 BASING EVERYTHING AROUND THE CUSTOMERS' EXPERIENCE

KIA Online Community Member Spotlight:
Judi Brenstein

32 SOLVING THE VIRTUAL TRAINING, COACHING, AND MANAGEMENT PUZZLE

Onboarding, Training, Coaching, and Managing in
a Remote Environment

39 CXMB SERIES 2020 CONSUMER EDITION EXECUTIVE SUMMARY



Striving Toward Continuous Improvement


Welcome to the October 2020 edition of the Execs In The Know magazine publication – CX insight. In this issue we tackle several topics that are critical to improving the experiences of your customers, as well as your employees.

Although the successes over the past six months have been hard-won, companies cannot afford to slow down efforts for pushing forward new ideas and new concepts. Now, eight months into the pandemic, companies are finding their footing, regrouping, and setting strategic priorities that will carry them through 2020, and well into 2021. Critical to these plans is the ability for companies to maximize Work-at-Home (WAH) operations. Most are now far enough along the WAH path to understand what works and what could work better. We're pleased to bring you some of these valuable insights in this issue.

If a global health crisis weren't challenge enough, 2020 has also brought about the need for many

brands to reexamine company culture. More importantly, it has caused brands to take a closer look at actions (or inactions, as is sometimes the case), and how they impact the experiences of both customers and employees. Different brands may be at different stages of this journey, but one thing is clear – the decisions made now will determine the strength of future relationships with customers and employees alike.

We invite you to peruse this issue, which touches on many of the topics highlighted above, including a feature piece on Diversity, Equity, and Inclusion, as well as several pieces on getting the most value out of your WAH operations. Enjoy!

Have a story idea? Please submit it to us at info@execsintheknow.com. Want to get this publication in your inbox? 

[Subscribe here!](#)



By Execs In The Know

Diversity, Equity, Inclusion — A Watershed Moment for Corporate America

Employees, Customers, and the World Are Watching How We Respond

Two-thousand and twenty has been a year like no other in recent history. From the sudden and devastating global impact of COVID-19 to the ongoing social unrest in our country, it feels as if we are at a watershed moment. Our employees, customers, and the world are watching how we, as leaders, respond. While these two issues may seem unrelated on the surface, they are intertwined because how we react to the latter will most definitely have an impact on our collective recovery from the pandemic and how it impacts our employees and customers. But more importantly, taking a close look at how we address diversity, equity, and inclusion (DEI) is simply the right thing to do.

In this article we will address this complicated and critically important topic based on external data,

as well as insights from three highly respected organizations and those responsible for leading DEI strategies:

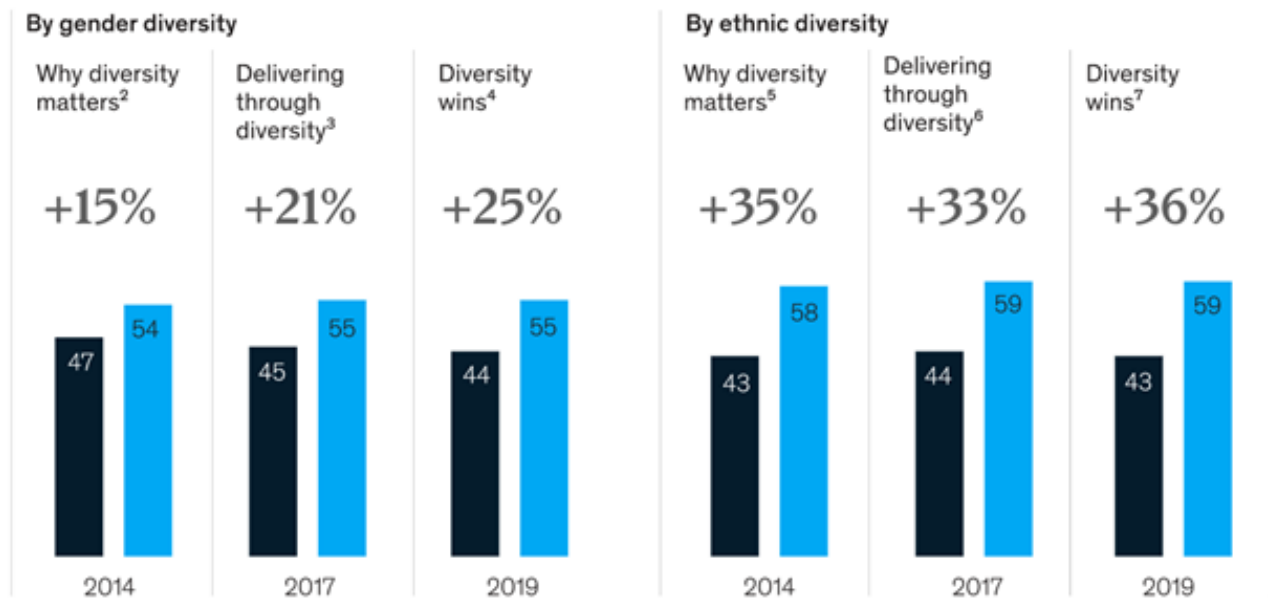
- **Corey Flournoy, Global Head of Inclusion and Diversity, Groupon**
- **DeShaun Wise Porter, Vice President of Diversity, Inclusion, and Recognition, Hilton**
- **Farrell Redwine, Senior Vice President of Human Resources, Nordstrom**

First, we will discuss why it is important to keep the focus on DEI, especially considering recent events impacting us globally. Then, we will take a deep dive into how leaders can and should respond to DEI at this critical juncture.

The business case for diversity in executive teams remains strong.

Likelihood of financial outperformance,¹ %

■ Bottom quartile ■ Top quartile



¹Likelihood of financial outperformance vs the national industry median; p-value <0.05, except 2014 data where p-value <0.1. ²n = 383; Latin America, UK, and US; earnings before interest and taxes (EBIT) margin 2010–13. ³n = 99; Australia, Brazil, France, Germany, India, Japan, Mexico, Nigeria, Singapore, South Africa, UK, and US; EBIT margin 2011–15. ⁴n = 1,039; 2017 companies for which gender data available in 2019, plus Denmark, Norway, and Sweden; EBIT margin 2014–18. ⁵n = 364; Latin America, UK, and US; EBIT margin 2010–13. ⁶n = 589; Brazil, Mexico, Singapore, South Africa, UK, and US; EBIT margin 2011–15. ⁷n = 533; Brazil, Mexico, Nigeria, Singapore, South Africa, UK, and US, where ethnicity data available in 2019; EBIT margin 2014–18. Source: Diversity Wins data set

McKinsey
& Company

Why Focus on DEI?

This seems like an obvious question for many organizations as it is no longer necessary to create a business case for driving DEI. But it is important to ground ourselves in the “why” to ensure DEI initiatives are not merely a checkbox activity. And the first answer is, again, because it is the right thing to do. There are many reasons that DEI cannot be ignored as business leaders. As stated in [Harvard Business Review](#), “Ensuring people from underrepresented communities are recruited and advanced is far more beneficial for an organization than any one individual. Diversity, equity, and inclusion attempts to level the playing field to allow the best ideas to flourish, connect talented individuals from underrepresented backgrounds with opportunities that those in the majority often have unfair access to, and

empower the best organizations to thrive. Done right, creating diverse, equitable, inclusive organizations yield [greater profitability](#), [innovation](#), and [smarter teams](#).”

To further emphasize this with data, McKinsey & Co. published a [report](#) in 2020 that found:

- Companies with greater **gender diversity** were **25% more likely to experience above-average profitability** compared to their counterparts.
- Companies with greater **ethnic and cultural diversity** were **36% more likely to experience above-average profitability** compared to their counterparts.

This is further demonstrated in this data from McKinsey’s report:

Additionally, the impact of COVID-19 has the possibility of being even more devastating to companies and people's lives if DEI strategies are not prioritized. Due to the sudden impact of COVID-19, some organizations may have de-prioritized their DEI efforts as they were laser-focused on how to plug the holes created by the pandemic. While that may sound like a reasonable approach on the surface, McKinsey's report emphasizes that research and history warn us that diverse talent can be more at risk during a crisis for many reasons:

- Downsizing, which many organizations have had to do, can often have a more severe impact on roles occupied by diverse talent.
- With more staff working from home, companies run the risk of unintentionally reverting to unconscious biases and undermining inclusion.
- Technology challenges, childcare, homeschooling responsibilities, and quality of home workspace also threaten to put affected staff at a disadvantage while working remotely.

Organizations have an opportunity to not only protect their bottom line, but the employees

in their care. McKinsey's report states, "There is ample evidence that diverse and inclusive companies are more likely to make better, bolder decisions – a critical capability in the crisis. For example, diverse teams have been shown to be better able to radically innovate and anticipate shifts in consumer needs and consumption patterns. Moreover, the shift to technology-enabled remote working presents an opportunity for companies to accelerate building inclusive and agile cultures – further challenging existing management routines. Not least, a visible commitment to DEI during the crisis is likely to strengthen companies' global image and license to operate."

How Should Leading Companies Respond to this Watershed Moment?

Most organizations have a DEI strategy, and possibly even a dedicated DEI team. So, what should leaders do differently to take decisive and bold action? In our discussions with the DEI leaders from Groupon, Hilton, and Nordstrom, four common themes emerged as priorities which we will discuss below:



**Listen,
Learn, and
Acknowledge**



**Create an
Intentional,
Holistic Strategy
that Weaves
DEI Through the
Fabric of Your
Company**



**Lead with
Courage,
Compassion,
Empathy, and
Accountability**



**Recognize
that Diversity
does not Equal
Inclusion**

LISTEN, LEARN, AND ACKNOWLEDGE

The first step in addressing DEI honestly and systemically in your organization begins with acknowledging what it means and understanding how your internal processes and policies may have contributed to conscious or unconscious bias. It involves educating yourself about the history of racism and understanding honestly how minority co-workers have experienced aggressions and microaggressions inside or outside of your organization. Take the time and do the research using credible data to understand current and historic events. Give employees a safe and genuine space to have their voices and feelings heard, in groups and one-on-one.

Our colleagues at Groupon, Hilton, and Nordstrom have all taken important steps in these areas.

When asked what organizations should focus on in light of recent events, Corey Flournoy with **Groupon** said, “One of the most important things organizations should do is to create space for needed conversations to address

systemic racism, anti-racism, accountability, and engagement of white counterparts in addressing challenges within the workplace.” Groupon has implemented a number of programs and initiatives to facilitate these conversations, one of which was a four and a half-hour course launched in 2018 based on unconscious bias theories. Its focus is on solutions and real business case studies that illustrate the power of effective DEI strategies and practices and their impact on companies’ bottom line and image. The workshops include action steps to foster relationships across cultural lines and practices to engage in difficult conversations. Additionally, Groupon hosted an open virtual forum this summer where more than 700 employees logged in. The powerful 90-minute conversation led to increased engagement and action by employees, including the creation of four “action groups”:

- **LISTEN:** Employee Forum Action Group, committed to continuing conversations and dialogue on racial challenges within and outside of Groupon’s culture, including the launch of an ongoing anti-racism book club. More than 500 employees took part in reading and discussing Robin DiAngelo’s *White Fragility* in an effort co-led by interim CEO Aaron Cooper.
- **LEARN:** Resource Action Group, committed to finding ways to share resources and engage local organizations committed to anti-racism and social justice activities. This group has expanded in creating activities for employees to continue to learn more about anti-racism and social justice, such as through film screenings.
- **MOBILIZE:** Diverse Merchant Outreach and Platform Engagement Action Group, committed to working on behalf of Black-, Latinx-, LGBTQ+-, and veteran-owned businesses, both in identifying those currently on the platform and engaging others who are not currently connected to Groupon. This group will work cross-functionally across



marketing, sales, technology, and other organizations to mitigate algorithmic bias and help diverse businesses leverage Groupon's platform.

- **SUPPORT:** Connection and Allyship Action Group, committed to addressing allyship challenges through cross-department networking, career development opportunities, community outreach, and one-on-one connections that can lead to change, growth, and progress.

Groupon has shared their [public response and actions](#) through their external platform and has launched other ongoing campaigns in support of [minority owned businesses](#).

DeShaun Wise Porter with **Hilton** explains, "Setting the stage for inclusivity begins with listening, understanding what inclusivity means for YOUR employees." To do this, she emphasizes the importance of creating a safe space where your people can be authentic and finding venues where you can actively listen. Recently, the company launched a "Courageous Conversations" virtual learning series to drive greater awareness and understanding across a host of diversity and inclusion issues, and ultimately drive change through dialogue and action. Hilton also consistently conducts engagement surveys that continuously give employees a voice, developing the trust that the company is listening and adapting. It is surveys like these that helped stimulate the plans for "Courageous Conversations."

Farrell Redwine with **Nordstrom** believes that one of the biggest challenges in corporate America is acknowledging that racism is real and being clear that diversity is just one step in dealing with systemic racism. To address this, Nordstrom took the initial steps to share their thoughts, beliefs, and approach with employees, customers, communities, board members, and vendor partners. Per Redwine, "Transparency is an important part of our commitment."

For the last two years, Nordstrom has been very focused on listening and gathering data to unpack employee sentiment as to what makes them feel like they belong, that their contribution is valued, and that they are heard and seen. Redwine explains that one of the most impactful actions they took was to make space for conversations to acknowledge the "heaviness" of the current climate. They hosted a series of "Courageous Conversations" which first focused on the Black experience following the death of George Floyd. This involved video calls for all employees in which Black employees openly shared their experiences and reality. Redwine further explains, "For me, to not only be witness to but lead through that was hard and heavy. The vulnerability our people demonstrated by exposing themselves and discussing things that aren't typically spoken about in a work environment was a healing process for me, my Black colleagues, and for the entire organization. To say we support you, we see you, we are taking a stand around this issue, and we don't support racism has been a catalyst for change and call to action." These formal and informal conversations have led Nordstrom to identify the most pressing areas of opportunity and establish clear goals that will move them in the right direction.

CREATE AN INTENTIONAL, HOLISTIC STRATEGY THAT WEAVES DEI THROUGH THE FABRIC OF YOUR COMPANY

Having a DEI strategy is not a poster on a wall, an internal communication, or an occasional social media post amid national outrage. It goes beyond town halls and listening sessions. While all of these are important to an overall strategy, embodying a culture that lives and breathes DEI starts at the top and must be embedded in all aspects of the company's leadership and strategy. It involves communicating why you have a DEI strategy and how it is expected to impact employees and customers. For example, in the Harvard Business Review article, examples were given as to how to communicate what you are doing and how it is part of your overall business

strategy. One example they provided was, “We realize we aren’t reaching all our customers when we have systems that are biased, and we aren’t making life easier for a diverse range of customers when we don’t have leaders from a diverse range of backgrounds. Here’s how we’re changing that.”

Further, it cannot be a side job or buried within Human Resources with a small budget. It takes a real and concerted effort to weave DEI into the fabric of an organization.

Flournoy agrees that DEI must be part of the overall business strategy. Collaborating across several business units, Groupon launched its first effort in support of Black-owned businesses during [National Black Business Month](#) in August. Groupon partnered with other organizations including the National Black Chamber of Commerce, iHeartRadio, and the Illinois Department of Commerce and Economic Opportunity to provide marketing support and a host of other services and workshops to help these businesses survive and thrive during the pandemic. The success of this campaign has led to additional efforts in support of [National Hispanic Heritage Month](#) (September 15-October 15) and [Women’s Small Business Month](#) in October.

Flournoy advises that before companies begin their “DEI activities,” they should determine their overall vision for what they want to accomplish. There should be a North Star goal in mind to guide all the activities and programs, rather than launching disparate efforts that may fail to make a real impact. Given the current climate, companies may do more harm than good if efforts are simply surface-level and consequently fall flat.

Additionally, Flournoy advises that organizations take a hard look at their DEI leadership structure. He says many organizations are not placing DEI roles at a high enough level to have significant influence and impact within the organization. Most companies have chosen to place DEI roles under the Human Resources umbrella. This often means they lack the authority or power to make decisions or change in the organization, especially across business units. Flournoy believes that for DEI to be successful,



companies must consider establishing either Chief Diversity Officer roles as part of the senior management teams or create roles that have direct access to senior leadership and across business operations to ensure maximum impact and intervention for necessary change.

Wise Porter explains that DEI has been at the core of the company's vision, mission, values, and culture, starting with the founder, Conrad Hilton, for over 100 years. The company's culture is grounded in his belief that global travel could be a bridge to international peace and understanding. This commitment has been at the heart of Hilton's overall strategy, fostering an environment of inclusion and belonging. Their dedicated DEI organization, which has been in place for 10 years, operates under a holistic framework that encompasses three pillars:

- **CULTURE:** Creating an inclusive workplace with opportunities such as team member resource groups and inclusion councils with a goal of allowing team members the freedom to voice their unique visions and achieve a sense of belonging.
- **TALENT:** Involves processes and approaches focused on attracting and retaining the best and the brightest talent. Wise Porter explains that the key to a successful strategy is to ensure they consistently hire to their culture. Succession planning is also an important component, investing in employees to accelerate development, and ensuring employees have equal opportunities for growth.
- **MARKETPLACE:** Engaging, supporting, and building business opportunities in the community and being actively involved in philanthropic events and causes.

As a result of their ongoing commitment to DEI, Hilton has been on the highly coveted DiversityInc. top 50 most recognized companies consecutively since 2015, ranking No. 2 this past

year as well as No. 1 in supplier diversity.

Nordstrom has also worked diligently to embed DEI into their overall strategy. Redwine describes one of the company's key values, "Owners at Heart," which is about ensuring every member of their team is empowered to use good judgment and do the right thing for their customers and people. They have galvanized the organization around values (such as this one) and connected it to their diversity strategy. So, their day-to-day decisions, processes, and policies are all driven by it. In Redwine's words, "Our DEI strategy is NOT an HR effort – it is seen as a business effort and a business-driven approach."

It is up to all of them to bring their strategy to life across all areas of the business. As such, their framework consists of **four strategic pillars including talent, leadership, culture, and marketplace**. This summer, they published and communicated their goals to employees, explaining how they are tied to these pillars and how they directly affect company growth and overall business results.

This has resulted in the ability to focus on systemic opportunities, leading to the achievement in pay equity for all genders and races in the company. Redwine said, "We recognize our holistic approach must continue to make systemic and sustainable change. You must consider the values of your organization and what it stands for – our goal is to deliver fashion authority and the best customer experience. That takes people, so we are digging deep with a leader-led approach embedding diversity into our overall business strategy."

LEAD WITH COURAGE, COMPASSION, EMPATHY, AND ACCOUNTABILITY

Achieving diversity, inclusion, and equity within an organization starts at the top, but requires all levels of leadership's commitment. A CEO who makes an announcement to the media

about its stance on racism and plans to improve diversity in the company is but one piece of the puzzle. It involves everyone at every level. Leaders must not only be *able* to have the tough conversations but *encourage* them. To create a truly diverse and inclusive work environment, one must lead with compassion for all employees, demonstrating a true understanding of underlying struggles (both past and present), and hold all levels accountable. Accountability involves consistent, public, and transparent reporting of diversity metrics, but it also involves holding leaders and staff accountable not only for the numbers, but the overall objective and culture. It is not easy and requires careful consideration of who you hire and promote in leadership positions as they set the tone for the company.

Fostering and teaching empathy is critical to Groupon's overall DEI strategy. As Flournoy explains, "To make meaningful progress, it requires leaders and staff to have empathy for other people." In fact, the company's mission is to cultivate an empathetic global community where commerce, innovation, and brand loyalty thrive through DEI. One of the things Groupon does to develop empathy is to conduct an Inclusion Workshop, which creates experiences for attendees where they are put in a position of removing their "blindness" and thinking from another perspective. Additionally, they conduct an allyship interactive workshop, focused on developing authentic relationships.

To develop leaders and support career growth, their "[GREAT Leadership Program](#)" involves 15 diverse women and minorities at mid management at any one time. The goal is to invest in leadership and career growth by providing them with executive coaches for eight sessions. To further embed diversity and inclusion among leaders, every director and above is required to meet with someone in a minority or under-represented group both internally and externally.

From a leadership accountability perspective, Flournoy cautions leaders that one of the mistakes he has seen organizations make is the belief that diversity and inclusion only involves people of color and women. This work *must* engage and hold accountable non-minorities who are in positions of power and influence to address and make systemic change. Flournoy also emphasizes, "Organizations that focus primarily on employee resource groups and unconscious bias training will not actually make the changes and impact required to improve and move the culture. People must engage across cultural lines and learn the importance of allyship, accountability and responsibility to make progress."

The responsibility for DEI spans all levels of the leadership team at Hilton. As Wise Porter explains, "It is part of our DNA and the expectation is that every leader has a responsibility to put DEI front and center." They hold their leaders accountable for driving an inclusive culture, going so far as to tie it to compensation structures. The intent is not to force it but to put the best people in the right roles, truly infusing DEI into every aspect of their organization. They measure gender and ethnicity diversity as part of hiring goals but also with succession planning and promotions.

For Hilton, courageous leaders are critical, and for over a century they have taught their leaders to "lead with hospitality." Wise Porter further explains, "The world is changing every day. There is no way we could have predicted what we faced in 2020, and our leaders had to show up with grace, maturity, and compassion. When you have courageous leaders that can naturally pivot and lean into challenging and difficult conversations...when you have leaders that can truly come to work and just 'have a conversation'...they have a true sense of humanity and adapt quickly - that's where you will find the greatest success." And even though the pandemic has unfortunately forced some furloughs and reductions in force, the

leadership team has remained committed and focused on DEI. They may not be recruiting at the same level as before, but their goals remain in place, focusing on developing talent internally, while staying true to their core values.

Nordstrom's "leader-led" approach is what enables their overall strategy and business outcomes. So, with their strategic pillars and measurable goals in place, the company is now focused on establishing programs that will help them get there. To do this, they have created the Nordstrom Diversity Inclusion and Belonging Council, which is co-chaired by Pete and Erik Nordstrom and Christine Deputy, their Chief Human Resources Officer. It is made up of a diverse mix of leaders from across the company and board of directors. Together, the group will focus on developing, implementing, and measuring programs that drive their strategy. They have also published the [specific goals and metrics](#) that define their success.

The company's approach to leadership involves the entire employee life cycle from onboarding to exit, with the goal that the employee experience is just as renowned as the Nordstrom customer experience. Their objective is to lead by ensuring employees do not just feel as if they are included, but that they belong. As such, they are constantly working with their leaders to ensure they have the resources they need to help support their teams. Redwine emphasizes, "This work has never been more important, particularly given the new ways of remote working and the recent events of racial injustice that deeply impact our employees and customers. We've rolled out a number of new trainings and resources to help them lead in the face of great uncertainty." All these efforts continue to cement their focus and approach at every level of the company.

RECOGNIZE THAT DIVERSITY DOES NOT EQUAL EQUITY AND INCLUSION

Striving for and achieving a diverse workforce is but one component. Numbers are important, but they are just numbers. The hard part is creating a

truly equitable and inclusive culture that provides a sense of belonging for all employees. There is plenty of evidence and research that suggests inclusive cultures contribute to better decision making, higher levels of performance, and greater employee retention. Simply put, the more inclusive the environment, the more engaged the employee and the more they thrive and perform.

In the same research conducted by McKinsey & Co., the findings showed a vast difference between employee sentiment comparing diversity to inclusion. Specifically:

- Overall sentiment on diversity was 52% positive and 31% negative, **while sentiment on inclusion was significantly worse at only 29% positive and 61% negative.**
- Additionally, the research found particularly high levels of negative sentiment about equality and fairness of opportunity, ranging from **63 - 80% negative sentiment across industries.**

So, even if companies are making progress in workforce diversity, there is still a lot of work to be done to address inclusion.

Training is only part of the solution, and many organizations conduct courses such as "unconscious bias training" and it is important. But how do you ensure you are removing biases? What are you doing to encourage an inclusive environment, and give people a sense of belonging, free from bias and discrimination? Again, it requires a holistic, systemic approach, with accountability at all levels of the organization. Transparency, honesty, openness, and leadership capabilities are all central to creating a truly inclusive and equitable environment - one in which employees feel they can bring their true and best selves to the workplace.

Groupon recognizes that diversity is just part of the equation. As Flournoy explains, "We place a great emphasis on creating a culture where people feel supported and championed by our senior leaders, and we strive to include diverse



voices in our decision-making process. At the end of the day, our employees and their shared experiences are the best recruitment tools we can utilize to attract more diverse talent. We must create a culture that is inclusive to prevent a 'revolving door' of black and brown talent who come to Groupon and do not stay long-term. The Business Resource Groups, our Global Pillars, and programs like the GREAT Leadership program have helped to retain and promote diverse talent, even during challenging times."

Hilton similarly strives to create an inclusive culture, ensuring employees have a voice and sense of belonging. An inclusive culture to them is one in which employees feel comfortable to "show up, innovate, collaborate and bring their best selves to work." Hilton leaders bring this to life through recognition programs, injecting open dialogue and upward feedback into professional development conversations, and supporting the company's strong network of Team Member Resource Groups. Above all else, though, Hilton Team Members learn from day one that they are part of a values-driven company, the first of which is to lead with hospitality - which, by definition, is all about creating a sense of belonging for all.

Nordstrom is keenly aware of the need for employees to not just feel included but to feel they belong. Redwine acknowledges that this is indeed the hard part and a priority that is at the heart of their strategies. One of the ways they have found to create a true sense of belonging for employees is the creation of their Employee Resource Groups (ERGs). These groups represent a variety of seen and unseen identities that exist across our employees, and they offer a sense of community, connectivity, and shared experiences. Nordstrom have had these programs in place for two years, and they have been particularly critical this year in supporting and leading important, difficult conversations. As part of the new goals announced last month, they also shared that they will be expanding these groups beyond the Seattle area so all employees can participate.

Seize the Moment. Be Bold.

Many organizations are at a crossroads and have an opportunity to seize this moment, taking bold action to drive systemic and lasting change. It is an opportunity like no other for leaders to rise above and ask themselves honestly if DEI is woven into the fabric of their company, if all aspects of their business are rooted in DEI, and if they can lead from a place of compassion and courage. Those who do will reap the rewards professionally but also personally. It is not an initiative that has a beginning and an end, but one that must always be front and center to reshape the landscape of corporate America. 🌟

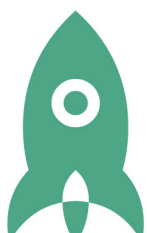


Execs In The Know



KIA ONLINE COMMUNITY

A private online platform where CX Leaders at consumer brands are connecting across industries to share insights, experiences, and best practices.



CX MARKETPLACE

Our content-rich resource hub and solutions showcase for emerging technologies in the CX space. Research how providers are approaching current challenges to seamless service.



CX EXECUTIVE JOB BOARD

A valuable asset for our KIA Community members. Access premium job opportunities posted by your peers and select recruiters in the CX space.

VISIT AND REQUEST TO JOIN TODAY!

community.execsintheknow.com

The Past, Current, and Future State of Work-At-Home

(An informal survey of Execs In The Know's KIA Community)

In late summer 2020, fourteen members of Execs In The Know's private community, Know It All (KIA), engaged in a conversation about their Work-At-Home (WAH) workforce, providing detailed information about the previous, current, and future state. Below is an aggregate of the discussion, provided with the permission of the participants.

Internal Resources

Avg. % of **Internal Team**
WAH Prior to COVID-19 | **23%**

Pre-COVID-19

Avg. % of **Internal Team**
Currently WAH | **99%**

Current

Avg. % of **Internal Team**
Expected WAH in Future | **79%**

**Post-Pandemic
Expectations**

External (Partner) Resources

Avg. % of **External Team**
WAH Prior to COVID-19 | **12%**

Avg. % of **External Team**
WAH Prior to COVID-19 | **76%**

Avg. % of **External Team**
Expected WAH in Future | **15%**

Additional Insights:

- 4 of 14 participants cited remote recruiting, hiring, training, and coaching as a specific challenge; agents with in-center training performed significantly better than those trained remotely
- 3 of 14 participants indicated their external resources were already in the process of returning to the office; one reason cited for the return to the office was local infrastructure challenges (Internet)

**Interested in joining
the KIA Community?**

Learn more at
Community.ExecsInTheKnow.com


Execs In The Know



Pivoting to Remote Assessments and Management of Outsourced Partners

By Execs In The Know

Ensuring Outsourcing Partnerships Are Set Up for Success

Your outsourced partners play a critical role in providing care to your customers. You expect them to act as an extension of your brand, be aligned with your objectives, meet your performance expectations, provide flexibility to best support your customers, all while paying a fair price. In 2020, these partnerships are more important than ever. As a result, organizations are re-examining their outsourcing business and technological requirements, assessing the capabilities of their existing partners, exploring potential new partners (where existing partners are not able to meet requirements), and adjusting their go-forward management approach in what is now a 100% remote or hybrid remote/office model.

Conducting physical site visits has long been an integral part of any outsourcing relationship, both in the selection/contracting phase and in ongoing

management. However, the current environment has impacted the ability to conduct in-person site visits. Even if that was possible, the reality is that a large percentage of the workforce are still working from home, so there are effectively no sites to visit. So, all organizations have had to pivot to a new way of assessing and managing outsourced partners.

In this article, we will share best practices about process changes organizations can to ensure their outsourcing partnerships are set up for success from the beginning, specifically focusing on how to address the gap caused by the inability to conduct onsite visits.

As we explore ways to navigate this challenge, the silver lining is that it does not have to be as complicated as one might think, and it can potentially be more efficient. The reality is that

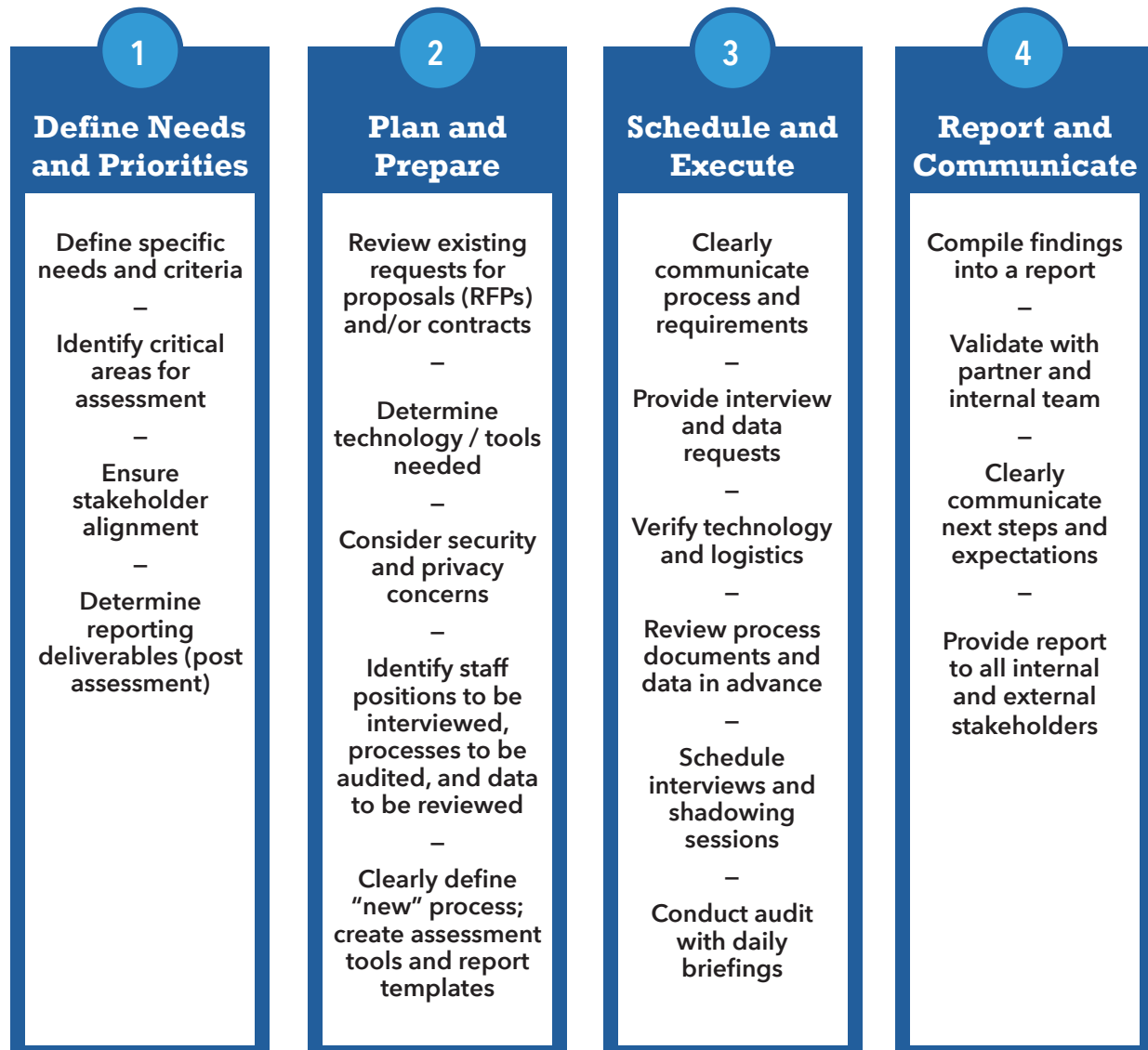
if your vendor management approach and sourcing process are designed well, you should experience little disruption. Even without being onsite, you will have confidence that you are choosing the right vendor based on your needs and that you are managing your existing relationships effectively.

In this article, we will address two key areas:

1. Remotely Assessing New and Existing Partners
2. Effectively Managing Partners Remotely

1. REMOTELY ASSESSING NEW AND EXISTING PARTNERS

Whether you are assessing a potential new partner or an existing one, you need a structured framework that should include four key components:



1. DEFINE NEEDS AND PRIORITIES:

Given the change in how businesses are operating, your requirements have likely changed. So, before you embark in a search for a new partner or you want to assess your current partners, it is important to examine your needs and priorities.

- a. **Define specific needs and criteria:** Be specific about what you need and the criteria you expect. This includes everything from language, channels, hours of operation, technology, skills, performance levels, account management, security/data privacy, pricing structure, business continuity planning, support processes (i.e. quality, workforce management, recruiting/hiring/training), and so on.
 - b. **Identify critical areas for assessment:** Once you have defined your specific needs and criteria, then determine what is most critical for you to assess in detail. Because you are operating in a mostly remote fashion, you may want to prioritize the most critical areas, and those may have changed given the largely Work-at-Home (WAH) environment.
 - c. **Ensure stakeholder alignment:** It is critical to ensure your internal stakeholders are aligned with your requirements and the priorities you establish. Your organizational priorities may have changed, so ensure you are aligned with those expectations.
 - d. **Determine reporting deliverable needs:** Start with the end in mind. As you think about the assessment and what you hope to achieve, consider what you expect to see at the end of it, and what will be most impactful to both you and your partner. Determine what the output should look like and develop a template in advance.
- and perhaps take the most time. But proper planning will be well worth the outcome.
- a. **Review existing RFPs and/or contracts:** With your needs and priorities defined based on your new reality, the next step is to review in detail your existing RFP documents and contracts, as you may need to make some adjustments. Now is the time to do this regardless of whether you plan to conduct an assessment.
 - b. **Determine technology/tools needed:** As you think about your remote assessment, obviously you will need creative and alternative ways to observe and audit. Web conferencing and screen-sharing capabilities (at a minimum) are needed. You will also need abilities to “shadow” agents as you conduct process and transaction audits – this can often be accomplished via your web conferencing/screen sharing capabilities as well as quality monitoring tools. Additionally, you will need ability to remotely share files and data.
 - c. **Consider security and privacy concerns:** With the technology and remote access required, security and data privacy must be a consideration. So, as you plan for your assessments, you will need to address these



2. PLAN AND PREPARE:

With any assessment, whether onsite or remote, planning and preparation are critical

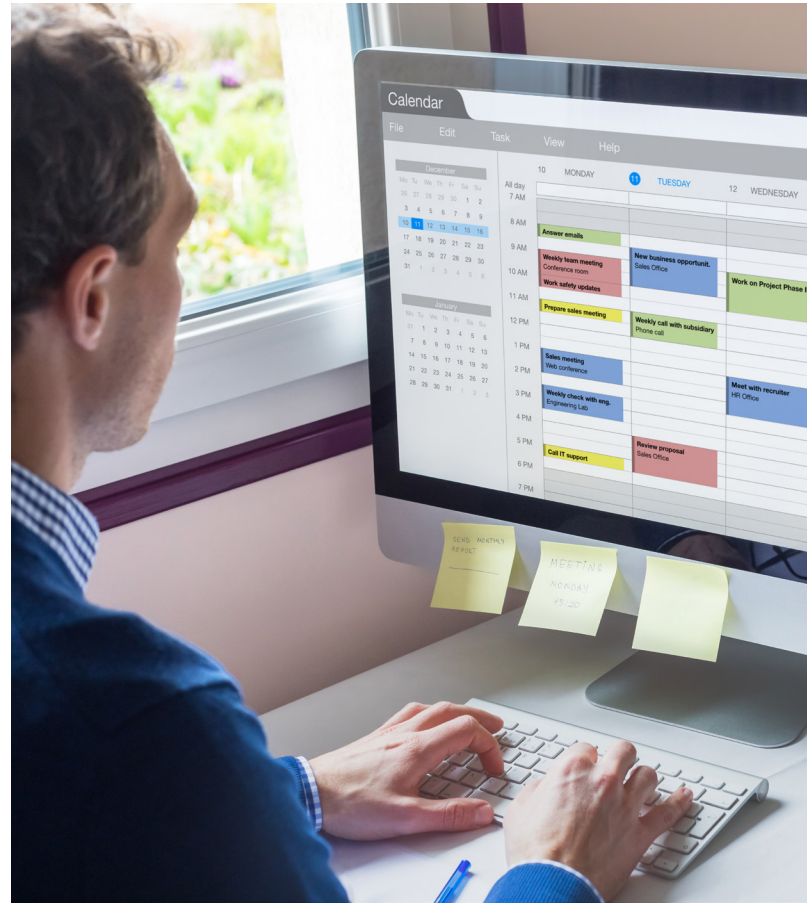
with your partners and your internal teams in advance.

- d. **Identify staff positions to be interviewed, processes to be audited, and data to be reviewed:** You will not have the luxury of spontaneous onsite discussions and shadowing sessions. However, this is something that should be planned for regardless of an onsite or remote assessment. Based on your priorities, identify and document the specific staff positions you will want to interview (i.e. agents, team leaders, operations leadership, quality, recruiters, trainers, workforce management, information technology, security, and reporting/analytics). Then, clearly define the types of shadowing sessions you would like to conduct. This should be based on the transaction types your partner is supporting. If your partner has a hybrid model of agents working from home and some on-site, ensure you plan to shadow both. From a data perspective, create a detailed list of the performance data and reporting you want to review as part of your assessment, again based on your specific priorities.

- e. **Clearly define “new” process; create assessment tools and report templates:** Because auditing and assessing may be a new approach for both you and your partners, spend time clearly laying out the new process and expectations. This involves creating new (or modifying old) assessment tools and templates. This should be extremely structured, consistent, and repeatable down to the specific questions/requirements you will be asking for each area, the data you are requesting, the structure/agenda of each day, and daily debriefing processes.

3. SCHEDULE AND EXECUTE:

Once you have completed planning and preparation, you are ready to go. Because



the assessments will be remote, there are few unique aspects to consider in the actual execution.

- a. **Clearly communicate process and requirements:** First, communicate the new process to new or existing partners. Ensure your partners clearly understand and are aligned with the requirements, expectations, and the process. **Important note for existing partners** - an important distinction and recommendation is to set the expectation that you may request an assessment at any given time with little notice. If they understand this up front and they have adequately prepared, there should not be a need for much advanced notice, and you will get a more accurate representation of reality.
- b. **Provide interview and data requests:** With any assessment, it will go much smoother if you provide a detailed interview list and

data/document requests in advance. You have already identified what these are, so it is just a matter of providing to your partner.

For your existing partner assessments, there may be times you want to conduct a targeted assessment. If so, then you would scale back your requests accordingly.

- c. **Verify technology and logistics:** Naturally, technology and logistics play a bigger role with remote assessments. So, you will need to work with each partner to ensure the technology and processes exist (or are implemented) for the assessment. This will require testing in advance.
- d. **Review process documents and data in advance:** To make the most of any assessment, best practice is to review all process document and conduct data analysis prior to the actual assessment. This way you can target your questions and prioritize areas of focus to be more efficient.
- e. **Schedule interviews and shadowing sessions:** Your review of the data and process documents may very well influence your interviews and shadowing sessions. Coordinate with your partner to make these happen. From a scheduling standpoint, any interviews and shadowing should be conducted based on the partner's time zone. A couple of best practice tips for interviews and shadowing:
 - i. **Interviews:** If interviewees happen to be onsite but you are not, have your partner secure a conference room where the interviews can take place, with the needed technology available. If interviewees are working from home, time will need to be built into the overall assessment schedule to ensure those individuals have the capabilities to participate remotely.
 - ii. **Shadowing:** Note that this is one of the most important aspects of an assessment. This is where you see what is actually happening, so it is critical to set this up

correctly. As the client, you should always be the one to choose the agents you want to shadow. In other words, there should not be any "cherry picking" of agents. Because you are remote, you do not have the benefit of spontaneously shadowing, but you can still make this happen remotely. Review agent level data beforehand and choose which agents you want to shadow as part of the assessment.

- f. **Conduct audit with daily briefings:** If you have done your preparation internally and with the partner, the actual audit should go smoothly and efficiently. Most importantly, in the spirit of partnership and improvement, conduct a daily briefing at the end of each day with your primary stakeholder so there are no surprises at the end and so you can adjust your agenda as needed based on what you are finding. Flexibility is key.

4. REPORT AND COMMUNICATE:

Lastly, once you have completed the assessment, provide a complete report and communicate results internally and to the partner. There should be no surprises, but the report should be delivered timely following the assessment. Obviously, the discussion with a potential new vendor is somewhat different from an existing partner, but the goal is the same - to be clear and transparent about the findings and why you are making the decision you are, or why your expectations are what they are.

- a. **Compile findings into report:** Your assessment team should be compiling this during the assessment, and reviewing as part of the daily briefings, so the final report should not take significant time.
- b. **Validate with partner and internal team:** Once the report is compiled, validate findings with appropriate stakeholders. At times you may have questions, or something was discovered that has not yet been discussed, so validate as needed to ensure accuracy.



- c. **Clearly communicate next steps and expectations:** The report and read-out should not simply be an accounting of what was bad or good. They should be comprehensive and include the specific next steps and expectations are from your viewpoint. If you are assessing a prospective new partner, this is likely a communication about your decision and how/why you are making the decision. This should be done live (via web conference) to ensure alignment and understanding.
- d. **Provide report to all internal and external stakeholders:** After the report is complete and the live read-out is conducted, provide the final report to all stakeholders and schedule follow-up as appropriate based on the next steps determined. The format of this will be different if you are dealing with a prospective partner versus an existing.

As you can see, planning and preparation are key, but a remote assessment can be as effective as an onsite assessment, and potentially even more efficient. Some research is showing that assessments that typically take days can be shortened significantly. There are some nuances if you are assessing a prospective versus an existing partner, but the steps and requirements are the same.

Now, let's talk about how to effectively manage an existing partner remotely.

2. EFFECTIVELY MANAGING EXISTING PARTNERS REMOTELY

We have discussed how you can still conduct spontaneous assessments of your existing partners without physically going onsite, but how does your approach change to managing

their performance in a remote environment? And how do you ensure partner staff remain connected to your brand and aligned to your objectives on a daily basis? There are three key components we will review:



These three areas are always critical and Vendor Management Organizations (VMOs) should have structured approaches in place already, but there are some practices that are best when operating in a mostly remote environment.

1. PERFORMANCE MANAGEMENT

Based on your specific criteria, requirements, and contract in place, you should already have a structured approach to measuring and reviewing results. But in a remote environment, there are some ways to ensure all remain aligned and action can be taken quickly if needed.

- a. **Transparent and real-time reporting:** This may seem obvious, but many times reporting is delayed or in disparate systems. There is often not a single point of truth that includes all vendors' performance for each key metric. To identify potential issues quickly and react to them is always important but especially important in a remote environment with management offsite as well.
- b. **Daily operational reviews:** A best practice is to schedule daily reviews with all vendors in the same meeting. With such a

dispersed workforce, it can be incredibly valuable to have daily discussions with the entire network of partners to review key metrics, discuss what is happening across the network, identify any controllable or uncontrollable issues, and share best practices. This level of transparency with the performance data and collaboration is incredibly valuable.

- c. **Spontaneous assessments:** We already discussed how to conduct spontaneous assessments, but this is a critical aspect of ongoing performance management. It is important to take time either quarterly or every six months to conduct a comprehensive assessment of the entire operation. You can also conduct these more frequently on a targeted basis – i.e. if you feel (based on data) that you need to dig into the quality approach. Best practice is to give little notice for these – this is not to catch people doing something wrong, but to ensure you get the most accurate representation of the operation. This should not be an issue for partners if they are aware of the process and their operation and processes are solid.

2. COMMUNICATION AND CONNECTION:

A frequent question we come across is how to ensure partners' agents and staff remain connected to the brand. This is difficult in typical times, but especially difficult with such a large percentage working from home and with new hire agents being trained at home. There are some initiatives you can take to ensure your partners remain aligned and connected.

- a. **More frequent town halls, fireside chats, or other types of small group sessions:** Many times, town halls are scheduled with partner staff as part of the onsite assessments and

visits that take place. Because these are not happening, consider scheduling remote town halls more frequently, or inviting them to internal town halls if appropriate.

b. **Ability to submit questions/feedback:** In a remote environment, implementing a hotline, information hub, or a form that staff can use to ask questions, provide feedback, or simply stay connected works well. Of course, these must be screened and regularly reviewed, responded to, and actioned to be effective.

c. **Structured communication and update process:** This is always important, whether remote or in-person, and for both external and internal staff. Your communication and updates to all agents and staff must be structured and tracked. You do not want to over or under communicate or the message and information will be lost. There should also be a central hub that staff can rely on versus keeping up with email communications or chat messages.

3. TRAINING AND KNOWLEDGE TRANSFER

a. **Training and nesting support:** Companies are finding that additional training and nesting support is needed in a remote environment. So, if you have a collaborative relationship with your partner, this is a recommendation you can make. In many cases, other resources such as quality resources and team leaders are brought in for nesting to ensure learners feel just as supported as they do in a physical site.

b. **Knowledge checks and verification:** You most likely already have knowledge checks and skills verification built into your training curriculum. When training remotely, more frequent checks and real-life practice are required to ensure understanding and mastery of the material, prior to the “final exam.”

c. **Post-training support and resources:** When you think about onsite training, one of the benefits is that immediately following training, learners are able to turn around and ask their peers, trainers, or supervisors direct questions. While self-paced learning is great (and efficient), one of the downsides is the loss of that spontaneous discussion and learning that happens. Consider alternatives that achieve the same goal, such as “slack” groups or “hangouts” that allow new agents a quick and effective way to reach out to peers and subject matter experts.

Remotely managing your partners does take effort and involves unique approaches to be effective. However, the reality is that you likely have many processes in place already if you are managing partners across the globe. The primary difference now is that so many of your partners’ staff (as well as your team) are working from home. So, there is no site to visit, even if you could. You must make a concerted effort to manage performance, identify outliers, conduct ongoing assessments, collaborate, and maintain that connection.

SUCCEEDING WITH REMOTE ASSESSMENTS AND MANAGEMENT

The important thing to remember in this virtual world we are all operating in today is that many of the same foundations apply. You still need to have clear goals and expectations, a solid plan, and a structured approach to executing. What companies may likely find is that they can be more efficient and effective in evaluating sites remotely. Nothing takes the place of seeing things in action, up close and personal via an actual site visit. But if your processes are designed well and you make well-informed adjustments by collaborating with your stakeholders and partners, you will not lose anything by operating remotely. You might actually gain a lot in the process. ✖

Shifting Contact Centers to Work-at-Home:

4 Essential Truths from the Front Lines

By David Moesser

Senior Director of Sales, Customer Experience Management
Conduent



For any organization, no matter what type of client it serves, customer experience matters. Today's customers expect always-on service – much like they expect doorstep food delivery at the click of a button, Amazon Prime-style access to everyday items, and their favorite songs served up on Spotify – without giving it a second thought.

When the pandemic struck the world, customer expectations never missed a beat, and it was immediately obvious that personalized, customized, “no-touch” style service was going to be more important to their daily existence than it ever was before.

In the world of customer contact centers, it's fair to say that no amount of business continuity planning had fully prepared the industry for this exact situation. In many cases, it required **transitioning a massive amount of people** — call center associates — to [work-at-home](#) (WAH) roles in order to protect their safety and continue operations.

Here's a look at **four essential truths** that guided successful contact centers in making a massive shift to WAH during an unprecedented global crisis.

1. Changing circumstances require new approaches

Despite the fact that many [customer contact](#) centers already had a WAH contingent, the pandemic brought unique circumstances and unexpected challenges. This required contact centers to respond in new ways. They couldn't simply assume that the same protocols already in place to hire and train “steady state” WAH associates could be broadly applied to this new scenario: **shifting thousands of existing associates** (or tens of thousands of associates) into WAH roles over a very short period of time.

That's the kind of volume that many contact center operators were dealing with – and the sheer

urgency of making such a mass transition of resources all at once required a great deal of planning, coordination, effort and resources to do it right.

In addition to the more expected challenges that might come along with shifting workers to WAH over a short period of time, such as ensuring equipment needs are met and information security protocols are in place, the conditions of the pandemic also brought a host of unique challenges around employee health and wellness (physical, financial, family and other concerns). So in addition to what may be considered your typical employee training and communications, it was critical to train managers on HR policies, practices and resources available. Managers also needed the right tools to assist associates and help them be successful in their new work environment, which often included children and other family members home from work or school.

2. Quick action is crucial, but you must operationalize

When the pandemic struck and WAH mandates began to be issued, contact center operators had to act quickly so that their clients' customers had continuity of service while protecting their associates' health and wellbeing at the same time. However, they couldn't just tell their brick and mortar-based associates to grab their laptops and head on home. There were data security issues to consider, compliance requirements, SLAs that required onsite workers, and a host of other barriers in the way. With these considerations in mind, a systemic approach was crucial.

A systemic approach is one that starts with a crisis management team with representatives from key functional areas such as HR, legal, communications, finance, security, and IT. For the geographically dispersed organization, that team should also include country leaders and business unit leaders who can interact day-to-day, making coordinated decisions to keep operations running on a global scale.

Operationalizing also means associates are given the same access to equipment, training opportunities and supportive resources along the way, with special consideration of any specific geographic requirements or limitations that require a custom approach. Acting quickly in a systemic way requires organizations to spend more time focusing on potential "gotchas" at the outset – so that implementation can be smooth sailing.

3. Flexibility can be a game-changer

While many operators already had business continuity plans in place when the pandemic hit, those plans didn't always account for what was being experienced on the ground. In some cases, those plans were built around the logic of moving delivery from one geographic location to another – clearly an issue when the entire world was grappling with the same pandemic challenges. In addition, some clients have regulatory or contractual requirements that restrict WAH or work outside of a specified delivery center.

The speed of making the shift to a largely WAH workforce was different for every client and every contact center operator, but in all cases a focus on flexibility was mission critical:

- Flexibility of **contact center operators**, who had to quickly adjust to new ways of operating and mobilize around their systemic approach to the transition
- Flexibility on the part of **contact center clients**, who depended on outsourced contact center operators and were, in some cases, required to look more closely at their own requirements and make selective adjustments to procedures and workflows in order to sustain service continuity
- Flexibility of **associates**, who had to quickly make the transition to new ways of working –whether they transitioned to WAH or were required to report to brick and mortar locations for socially-distanced, mask-required shifts



One of the key learnings from the pandemic is that the logistics of a mass transition to WAH should be a key focus area of business continuity planning for all organizations moving forward.

4. Client communication is key to success

Working through the dual challenges of ensuring business continuity and protecting a contact center workforce required constant communication with clients – partnering with them to deploy contingency plans that would meet their needs through the transition to WAH and beyond.

Whether those plans included hiring more resources to work shorter shifts, redistributing work among “necessary” staff members, or shifting service channels from voice to digital to accommodate increased volumes and WAH conditions, success meant making every one of those decisions in close collaboration with the client.

Clear, frequent and multi-touch client communication was vital to putting the right set of protocols and resources in place to deliver exceptional customer experiences at the most challenging times, ensure the confidentiality and compliance of client data, and meet client SLAs month over month.

What that communication looks like in action is likely different for every client and relationship, but one example is having a daily call with all stakeholders from both the client’s operations and IT teams and the contact center provider’s HR, IT and site leadership teams. The call might take a full hour or just a few minutes. But having regularly-scheduled, mandatory check-ins ensures that all stakeholders stay in the loop and any issues are addressed quickly.

Through mutual trust, collaboration, and a constant feedback loop, contact center operators – and the clients they serve – are emerging from the throes of the pandemic more prepared for the future than ever before.

Looking forward

Stepping up and making major changes to your operations during a time of crisis is challenging



and full of risk – but sometimes necessary to achieve client commitments and protect the safety of your associates. While many organizations shifted employees to WAH during the pandemic, making that shift en masse for a large contact center operation requires special considerations and a laser focus on the details.

It's estimated that, when the pandemic is over, [30% of the entire workforce](#) will work from home at least some of the time. Contact centers, due to the nature of their function and organizational requirements, may experience a higher percentage returning to brick and mortar locations than some other industries. However, the benefits of WAH for contract centers are clear: greater flexibility for associates, lower attrition rates and reduced hiring/onboarding expenses, increased options for 24/7 coverage support, and more effective business continuity planning to name a few.

No matter what the future brings, one thing is certain: contact center models have been forever changed by the crisis of 2020 and adaptation to the “new normal” – and whatever comes next – is essential to future growth. 🌟

About Conduent

Conduent delivers mission-critical services and solutions on behalf of businesses and governments – creating exceptional outcomes for its clients and the millions of people who count on them. Through people, process and technology, Conduent solutions and services automate workflows, improve efficiencies,

reduce costs and enable revenue growth. It's why most Fortune 100 companies and over 500 government entities depend on Conduent every day to manage their essential interactions and move their operations forward.

Conduent's differentiated services and solutions improve experiences for millions of people every day, including two-thirds of all insured patients in the U.S., 11 million employees who use its HR Services, and nearly nine million people who travel through toll systems daily. Conduent's solutions deliver exceptional outcomes for its clients including \$17 billion in savings from medical bill review of workers compensation claims, up to 40% efficiency increase in HR operations, and up to 40% improvement in processing costs, while driving higher end-user satisfaction. Learn more at www.conduent.com.

Meet David Moesser

David Moesser has been in consultative sales and sales leadership roles for 25+ years, with particular expertise in the areas of customer experience management; contact centers; finance, accounting & procurement; and transaction processing. He specializes in helping organizations transform through outsourcing services programs that are integrated with enabling technology. A problem solver who enjoys working with people, David's greatest satisfaction comes from building powerful, win-win client relationships with mutually beneficial outcomes. David lives in Salt Lake City, Utah where he loves spending time with his wife, children and grandchildren.



Thank you to David Moesser of Conduent for providing leadership insights.

Basing Everything Around the Customers' Experience

KIA Online Community Member Spotlight: Judi Brenstein

By Execs In The Know



GROUPON

EXECS IN THE KNOW (EITK):

Judi, you've been with Groupon for a couple years now, but your experience within the industry is truly expansive. Can you share some of the most important experiences and insights you've

gained throughout your career, and how they are shaping your work for Groupon?

JUDI BRENSTEIN: For over half of my life, I've had the good fortune to work with customer experience (CX) and sales centers throughout the world, both internal and external. Without question, the most important insight I've ever learned is that if you base everything you do around the customer's experience, whether for sales or service, you can guarantee success.

Another thing I've learned while being in this industry is that most people at an agent level want to do a good job. If you focus your hiring towards the minimum skills and traits that it takes to have a good customer experience and you make sure that those people on the frontline have what they need to succeed (including proper managerial support) you cannot go wrong. The most successful CX organizations I've worked with are flat, managerially speaking, but have plenty of support for those who deal one-on-one with customers or clients.

EITK: COVID-19 has, in many cases, forced companies to deconstruct and reconstruct their contact center operations. How has the pandemic impacted Groupon customers, and how has your

organization been altered by the pandemic? What do you envision for the future?

JUDI BRENSTEIN: I distinctly remember leaving our Chicago office in mid-February and the decision had been made that there would be no more travel until this virus we'd been hearing about was better understood. Our company is global, and our intelligence on this matter was, likewise, coming from the global scientific community. When Groupon decided on no more travel, the value of hundreds of airline tickets was lost months before airlines were offering refunds. But we did not dismantle; we didn't stop working; we just stopped traveling. What we did do was immediately have a cross-functional and global team to work on our current business continuity plan, with new discussions and decisions made about what to do if this virus turned into a pandemic. The guiding principle was: How can we ensure that our employees can continue to work safely either at home or in office? With much work and incredible collaboration from our many company groups, we were able to go 100% work from home in the matter of just a couple of weeks from when we had finalized our plan.

EXECS IN THE KNOW (EITK): Channel strategy has evolved mightily over the past few years, especially with the availability of cheaper, more capable solutions and tools. How has Groupon's channel strategy evolved in your time with the company, and what have been some of the primary drivers of this change?

JUDI BRENSTEIN: I've been with Groupon for a little over two years and our channel strategy has been much the same in that two-year period, with the exception of during this COVID period. In

the current work-at-home (WAH) environment, we've had to eliminate our phone channel, but have countered this by beefing up our ability to allow for self-resolution, while also focusing more resources on chat and email.

EXECS IN THE KNOW (EITK): Company policies and processes play a major role in shaping the customer experience. How has Groupon evolved these aspects of its business, and what impact has this had on things like resolution rate, customer satisfaction, and customer effort?

JUDI BRENSTEIN: We spend time weekly reviewing data related to the impact of our policies and devote a monthly session to what our quality assurance process tells us about our policies and processes as it relates to our ability to solve both customer and merchant transactions. I'd say we take it very seriously and have dedicated customer experience and merchant experience groups, each focused on the needs of both our customers and our merchants.

EXECS IN THE KNOW (EITK): The past six months has many companies rethinking their priorities. What is Groupon most focused on today and tomorrow, and what is the expected impact of these priorities on the business and the experience of Groupon customers?

JUDI BRENSTEIN: From a CX perspective, our priorities remain the same as they were pre-COVID. We recognize that not every transaction goes as planned. So, when something doesn't go as planned, our sole focus is to ensure we do everything we can to show our customers and merchants that we are there to help them solve issues within the parameters of their purchase (for customers) or offer (for merchants).

EXECS IN THE KNOW (EITK): You've been a big part of the Execs In The Know community for many years, doing everything from panel moderation to game show hosting. You even sit on EITK's Corporate Advisory board. Can you share how your involvement in the EITK community translates into

value for yourself, your organization, and the community at large?

JUDI BRENSTEIN: EITK made a believer out of me that there are some conferences actually worth going to. What I did not realize when I first got involved was that it was an entire community of like-minded industry professionals who want to do nothing more than share what works with one another so we can all get better together. It has translated into everything from great ideas to take back to my clients or colleagues, a great opportunity to show others our best practices, and to close and personable friendships with a lot of people at a lot of great brands. To say I think highly of EITK would be an understatement. As I tell everybody, even when hosting game shows, this is the only conference I go to every year. I get offers to be flown into all kinds of places for free and put up in hotels for free - offers which I always politely decline. Not because I don't appreciate it, but because I know I am better off investing my time at an EITK event.

Thank you to Judi Brenstein, vice president, Global Support Groups & Vendor Management at Groupon, for her leadership, participation, and insights. To connect with Judi, or participate in the wider conversation, consider joining the Execs In The Know "Know It All" (KIA) Community. The KIA Community is a private, online community designed exclusively for CX Leaders at consumer-facing brands. Come learn, share, network, and engage to innovate.

[LEARN MORE.](#) 





Execs In The Know



SAVE THE DATE

FOR OUR VIRTUAL OUTSOURCING BRIEFING

JOIN US

DECEMBER 10, 2020

FEATURED KEYNOTE FROM: TARGET CORPORATION

FOR MORE INFORMATION ON UPCOMING EXECS IN THE KNOW EVENTS

VISIT <https://execsintheknow.com/events>

By Execs In The Know

Solving the Virtual Training, Coaching, and Management Puzzle



In March of 2020, companies all over the world were forced to shift almost 100% of their contact center staff to a work-at-home (WAH) model. As an industry, when we collectively look back on this time, it is somewhat mind boggling to grasp the scope of that effort. From a business continuity perspective, companies were focused on the immediate task at hand, which was to ensure employees had the necessary equipment and internet access at home, while addressing security and compliance concerns. That was Day 1. As time has passed without a major return to the workplace, companies have been focusing on developing processes and implementing technologies to ensure remote workers can be onboarded, trained, coached, and effectively managed in a remote environment. Companies that already operated a WAH model had an advantage, but ensuring best practices are consistently deployed in a virtual world is a constant focus.

Organizations have had to take the “center” out of “contact centers” in the first half of

2020. Historically, physical centers were the backdrop for new agent learning, existing agent collaboration and upskilling, face-to-face coaching, and real-time assistance. How do you replicate this, and perhaps even improve upon it, in a virtual world? As organizations start to bring some staff back to physical contact centers, organizations must ensure employees receive comparable training, coaching, and management whether they are in a physical site or at home. After all, customers do not care where agents are located – they just want their issues consistently resolved with minimal effort. So, it is up to all of us to put the puzzle together to make that happen. Technology, of course, plays an important role, but even the best technology cannot support an ineffective process or structure. So, while we will touch on technology, the focus of this discussion will be the key process and organizational components required to effectively train, coach, and manage staff. We also asked Mark Killick, Vice President of Care with Instacart, to provide some insights and examples of what is working for them.

VIRTUAL TRAINING: ONE SIZE DOES NOT FIT ALL

When we think about training we often focus primarily on new hire agent training, which is critical. However, we also need to consider ongoing/upskill training, so most of the principles we will address apply to both.

With remote staff, a common mistake that companies make is simply trying to replicate their in-person training. This course of action was necessary in the early days of the pandemic, but as time goes on organizations need to be more thoughtful and develop a cohesive, hybrid model. One size does not fit all – to ensure your in-center and at-home staff receive comparable training often means varied approaches and considerations.

MINIMUM SKILLS REQUIRED FOR

REMOTE STAFF You cannot talk about new hire training without first considering the skills required for a remote worker. While the technical skills and knowledge required may not change substantially, (with the exception of tools) the required intangibles and soft skills are likely different. You cannot simply “copy and paste” your job descriptions for WAH agents. For example, workers must be more self-motivated, and you may even need to consider if traits such as being extroverted are a good fit for a remote role. Some companies have reported that extroverts are struggling in a WAH environment as the feeling of isolation and lack of comradery found in a physical site are difficult for them. You also need to ensure new hires are comfortable and capable of being trained and coached remotely. Additionally, some organizations are hiring part time workers for remote staff, which also has hiring implications. With a WAH model, the ability to offer part-time work provides more flexibility for scheduling and broadens the hiring pool. So, evaluate and adjust the minimum skills required for any new remote staff and ensure you are hiring the right profile for this environment.

NEW HIRE TRAINING MODALITY In the early days of COVID-19, companies had to pivot quickly and many had no choice but to simply shift all new hire, in-person classroom training to a web-based platform using the same materials, with a trainer presenting the material. There was little time to modify content or create new curriculums. As time goes on, consider mixed modalities, meaning a combination of live, instructor-led, remote training with online self-paced training. In Instacart’s case, they leverage Zoom as part of a blended learning approach that incorporates self-discovery (like knowledge search and scavenger hunts) with eLearning to demonstrate and assess. They have also found success leveraging Slack with subject matter experts (SME) supporting the facilitator. This solution has proven valuable for them, allowing the class to keep moving without being distracted by chat. Whatever you choose to do, put yourself in the learner’s shoes – it is difficult to sit in front of a computer for eight hours listening to someone review training materials meant for an in-person audience. Break the training up so learners stay engaged and focused. Again, one size will not fit all for remote and in-center employees. As you move to hybrid staffing models, you may very well need two approaches with varied modalities.

PRACTICAL APPLICATION With classroom training, it is important to give learners frequent “real life” practice. It is perhaps even more important to incorporate “real life” practice in a remote world so they can apply what they are learning throughout training with relevant scenarios. Training cannot be theoretical whether conducted remotely or in-person – it must be experiential throughout with even more practice provided for remote learners. This will improve the chances of their eventual confidence, effectiveness, and efficiency post-training.

VERIFICATION OF SKILLS AND KNOWLEDGE

Verifying skills is always important regardless of learner location, but in a remote environment,



consistent knowledge checks and verification of skills is critical. It is more challenging to know with confidence that remote learners understand the material, so you cannot wait until the “final exam” to conduct knowledge checks.

NESTING Some brands report that more nesting support is required for remote learners versus in-person learners. In an in-person environment, there may be one or two trainers available for support depending on class size. In a remote environment, trainers need to provide more support from the very beginning to teach agents the basics such as logging in (sometimes one-on-one troubleshooting), observe what trainees are doing during class, provide feedback, and coach in real time. Many organizations, including Instacart, are using technologies such as Zoom to conduct side-by-sides during nesting (and for existing agents).

TRAINING LENGTH AND CLASS SIZE Some organizations have reported that the length of new hire training is longer for remote workers when compared to in-person. That may be counter-intuitive, but many are not able to go as fast in a remote environment due to technical challenges, time needed to observe remotely,

conducting frequent knowledge checks, and increased time for practical application. Secondly, consider class size. What may have worked in an in-person class may not work in a remote environment. Instacart explains that class size is one of the most important factors in remote training. They have found that over 20 in a remote class creates engagement issues.

TECHNOLOGY Obviously, technology plays a role with any training program, especially with remote staff. However, we have talked to organizations who have not implemented advanced technology yet, but they are still having success training virtually. There are some “must haves” to ensure success with remote learning long term and some “nice to haves” which may become part of your longer-term strategy if they haven’t already:

- **Firewalls and connections** – This may seem obvious, but this is one of most important areas in a remote training environment. Firewall issues must be addressed when onboarding learners, and the risk of learners being blocked or losing connection during eLearning must be minimized.
- **Screen sharing or screen observation** - The ability to view what your agents are doing during nesting and any practice scenarios is critical. However, if you do not have screen sharing technology yet, there are creative ways to replicate side-by-side observation through applications such as Zoom, Microsoft Teams, or GoToMeeting.
- **Sandbox environment** – New hires, whether remote or in-person, need the ability to practice during training. Creating a sandbox environment where the new hires can practice handling customer transactions while utilizing resources and knowledge bases is important. Some companies have technology to create this sandbox environment. There is also instructional design software that can replicate a production environment so seamlessly that



learners feel they are in the system handling actual transactions.

- **Collaboration tools** - There are many collaboration tools which offer nesting agents the ability to ask questions and collaborate with fellow learners or trainers. In lieu of these, even free tools such as Google hangouts or Skype work as well. Instacart believes that employing greater usage of editable PDF learning workbooks for learners and stronger breakout capabilities will be a necessity.
- **Learning Management Systems (LMS)** - Prior to COVID-19, some organizations were not yet providing online, self-paced training. With a remote staff, this becomes more important not only from a learning perspective, but from an efficiency perspective. So, an LMS will become a necessity to effectively offer and track training remotely.
- **Remote learning technologies** - There are new technologies coming to market daily which bring in-person, classroom training to life remotely in sophisticated ways. While not necessarily required to provide effective virtual training, they can be good additions to a remote training toolkit.

VIRTUAL COACHING: MORE IS BETTER

Training in a virtual world is not the only challenge - managers must provide ongoing, effective coaching to existing employees to maintain performance and employee morale. How do you ensure remote employees receive the same level of attention as those in a physical site? Even if your staff is not sitting beside you, you must be more cognizant than ever about maintaining that connection. A front-line manager's number one job is helping their agents get better. This is no different with a remote staff but requires more focus and attention in a virtual world.

DATA, DATA, DATA In addition to monitoring and observing agents, front-line management must review and understand the performance data for each of their agents. Do not simply rely on one metric (like quality assurance data) to tell the story. Understand what the metrics mean and connect the dots to know what to coach. Avoid the pitfall of coaching only to metrics that are easy to measure like Average Handle Time (AHT).

A balanced set of metrics is critical with an understanding of what performance story they tell. Key Performance Indicators (KPIs) such as resolution rate, escalation and transfer rates, drop rates, productivity (occupancy and utilization), schedule adherence, and quality are all important to review holistically.

INCREASED FREQUENCY In a remote environment and with a global pandemic raging, you need to coach and check-in even more often than in a face-to-face environment. This will likely have an implication to your management structure which we will discuss below, but with more coaching required, the need for more supervisors and coaches is often needed when coaching remote workers.

FACE-TO-FACE It probably goes without saying at this point, but coaching must be face-to-face. Most companies are now quite accustomed to using Zoom or other video applications, but all coaching should be conducted face-to-face so body language can be read and to minimize the risk of misinterpretation. So, turn those video cameras on and ensure your staff do the same. Companies we have talked to tell us that requiring this of all managers and employees has resulted in happier employees with reduced feelings of isolation, and a side benefit of increased engagement during meetings. Let's face it, it is also easy to be distracted when you are not face-to-face.

LEVERAGE YOUR ORGANIZATION'S VIDEO CONFERENCE TOOL AND SCREEN SHARING To understand what your staff are doing, again, use your video technology and watch how they work, just as you would if sitting side-by-side. Know what tools they are using, how they are using them, and what they are doing with their time.

QUALITY MONITORING Supervisors should be monitoring agents consistently regardless of staff location. One could argue that agents should be monitored even more often in a remote environment. This is not for the purpose

of catching agents doing something wrong, but to provide support and coaching since they do not have the benefit of being close to teammates or managers when they need help. This should be done both silently (without the agent knowing) and side-by-side, using some of the tools discussed previously.

TECHNOLOGY There is no shortage of technology enabling closed-loop coaching and feedback through quality assurance tools in our industry. Many tools also provide the ability to push training material or job aids based on the situation observed. As discussed, the ability to screen share (and capture), record transactions, and live monitor is a necessity to effectively coach agents. Artificial Intelligence (AI) is also playing a role, offering up answers/resources which can possibly shorten training time. Those certainly help, but again, most important are the fundamentals mentioned above.

The bottom line is your front-line supervisors must spend time with their staff, just as they would in a physical site. Employees are happier and feel more connected when managers simply spend time with them, take an interest in their future, and help them succeed.

VIRTUAL MANAGEMENT: REMOTE DOES NOT MEAN INVISIBLE

Managing a remote staff also has some nuances. Whether you have a 100% remote workforce, or a hybrid model, how you manage each requires some thoughtful planning and consideration. Managers with remote staff must be even more present and engaged.

REAL-TIME MANAGEMENT Real-time management of agents and their work is always important but is amplified with any amount of remote staff. It is easy to lose productivity and visibility in a remote environment. So, you must have a strong real-time management process, understand where agents are, what they are working on, and how they are spending their time. It is common to lose productive hours in a



remote environment, so this is a critical element from a customer experience and efficiency perspective.

ORGANIZATIONAL STRUCTURE AND MANAGEMENT SKILLS

In most cases, a remote staff requires flatter organizations, but with more direct agent support. This may be good news for the budget as fewer layers of more expensive management may be required depending on how you are structured.

PERFORMANCE DATA AND ANALYTICS You must have useful and accurate data that provides managers with a holistic view of performance. As mentioned above, a balanced set of metrics

is critical. Resolution rate, escalation and transfer rates, drop rates, productivity (occupancy and utilization), schedule adherence, and quality are all important to review holistically. But more important than the metrics is understanding what they are telling you, and how they come together to give the complete picture. For example, if your AHT is coming down, but your escalation rates increase, you could have agents escalating inappropriately to keep AHT down. In a remote environment, the importance of reviewing tools latency and outages is also important, as this can have a negative domino effect in any scenario, but especially with remote staff. So, you need resources skilled in analyzing, interpreting, and operationalizing the data to

drive improvements. In other words, know what the data is telling you versus relying on opinions - this is a must, regardless of where your agents are located.

MANAGEMENT SKILLS As with agent skills, you may find the skills required to manage differ with a remote or hybrid workforce. You need managers who understand data and can connect the dots. Your front-line supervisors must be engaging and effective coaches, and all leaders must lead from a place of empathy and trust with the ability to connect with and engage with people even more effectively.

TECHNOLOGY Again, technology has an important role with effectively managing and supporting any operation. This is not an all-inclusive list, but addresses the most important:

- **Reporting and analytics tools** - Again, data is king, so the ability to quickly assess performance with a single view provides a complete picture and enables quick action.
- **Security tools** - Security is always a concern and a priority with remote staff. You need to minimize the risks associated with customers and private information. There are many tools currently available which prevent security breaches with WAH staff.
- **Real-time management tools** - Again, real-time management is important in any environment, but especially with remote workers. You need visibility into what agents are or are not doing to ensure service levels are met and to avoid lost hours. These tools allow your workforce management staff the visibility they need to effectively manage service levels and productivity.
- **Contact recording and screen sharing / observations** - As discussed previously,

the ability to observe recorded and live transactions is a must in any environment. It is important for coaching purposes as well as managing staff performance.

Remote Staff is Not Going Anywhere, So We Must Adjust for This New Reality

As stated in [this article](#), "Companies will have to learn that remote work is different work. Managers will have to get better at judging productivity by setting and monitoring specific goals rather than using the proxy of office attendance. Workers will have to adopt extraordinary conscientiousness when it comes to dividing their day into work, office communications, personal time, and civic or family life. Employees will have to develop new habits, such as keeping copious documentation of every meaningful work interaction, so that teams across space and time are always up to speed on what is happening "down the hall." And bosses will have to normalize more video conferencing and virtual get-togethers and when possible, actual get-togethers, because their employees will continue to crave face-to-face interaction."

So, even as companies start to bring some staff back to centers, the reality is that for the foreseeable future, most companies will have a significant percentage of staff working from home. Now that we are all past the initial fire drill of moving workers home, it is time to take a step back, evaluate what has worked and not worked, and create a plan for the future that addresses the training, coaching, and management needs of a hybrid workforce that includes both remote and in-center staff. 📌

2020 Consumer Experiences and Opinions:

A Year Like No Other



Executive Summary

The 2020 Consumer Edition of the Customer Experience Management Benchmark (CXMB) Series marks the ninth year of publication and the 16th volume in the series. The CXMB Series continues to be a joint research effort between Execs In The Know and COPC Inc. The intent of the series is to investigate consumer and corporate experiences and perspectives related to customer care, providing valuable insights to customer experience (CX) leaders.

2020 has been a year like no other. The COVID-19 pandemic and the associated social and economic restrictions forced organizations to transition contact center staff to home virtually overnight, while also impacting how consumers interact with brands.

The focus of this year's consumer research is to investigate how consumer behaviors and opinions have been shaped or changed by the unusual circumstances organizations have faced globally.

We surveyed more than 4,000 consumers in the United States to ask them about their experiences and perceptions of dealing with brands' customer care departments or self-service options.

As in previous years, we have examined the data to spot any emerging trends and uncovered four key themes:

1. COVID-19's effect on consumers' interactions with brands
2. Chat's emergence as a widely used, mainstream channel
3. Improvements in self-service technology
4. The service journey's impact on CX metrics

This Executive Summary previews these key findings from our latest research. The full report of the 2020 Consumer Edition will be released in October 2020 in conjunction with the Execs In the Know's Customer Response Summit. We hope the information in the report will once again provide valuable insights for our Execs In The Know community, and for professionals in the wider customer contact industry.

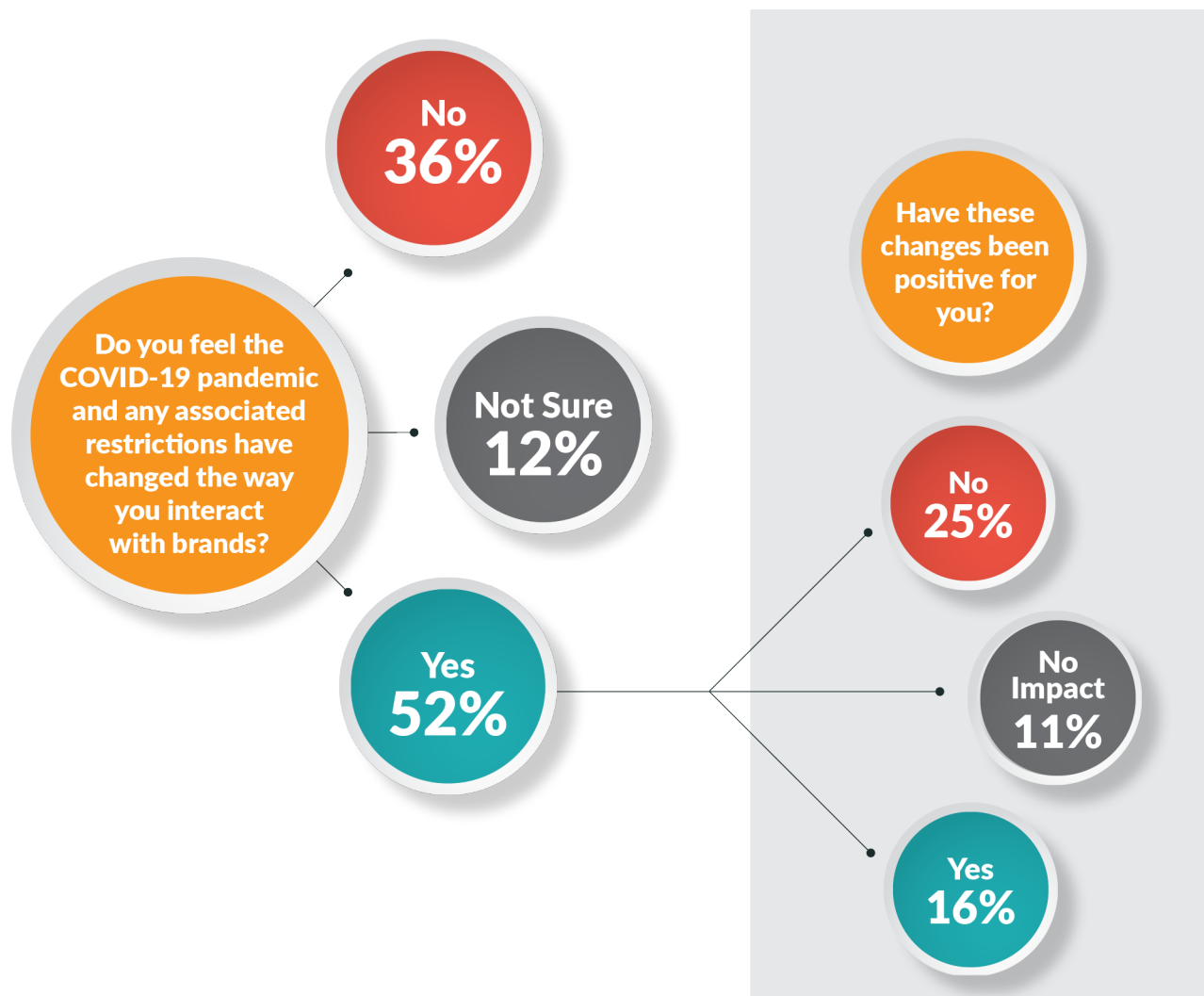
Yours sincerely,



COVID-19'S EFFECT ON CONSUMERS' INTERACTIONS WITH BRANDS

The COVID-19 pandemic and the associated restrictions have clearly had an impact on how we live, work, and interact in our communities.

While just more than half of the respondents reported that they changed how they interact with brands due to COVID-19, **only a quarter of them thought the changes were negative, and 16% perceived these changes as positive.**



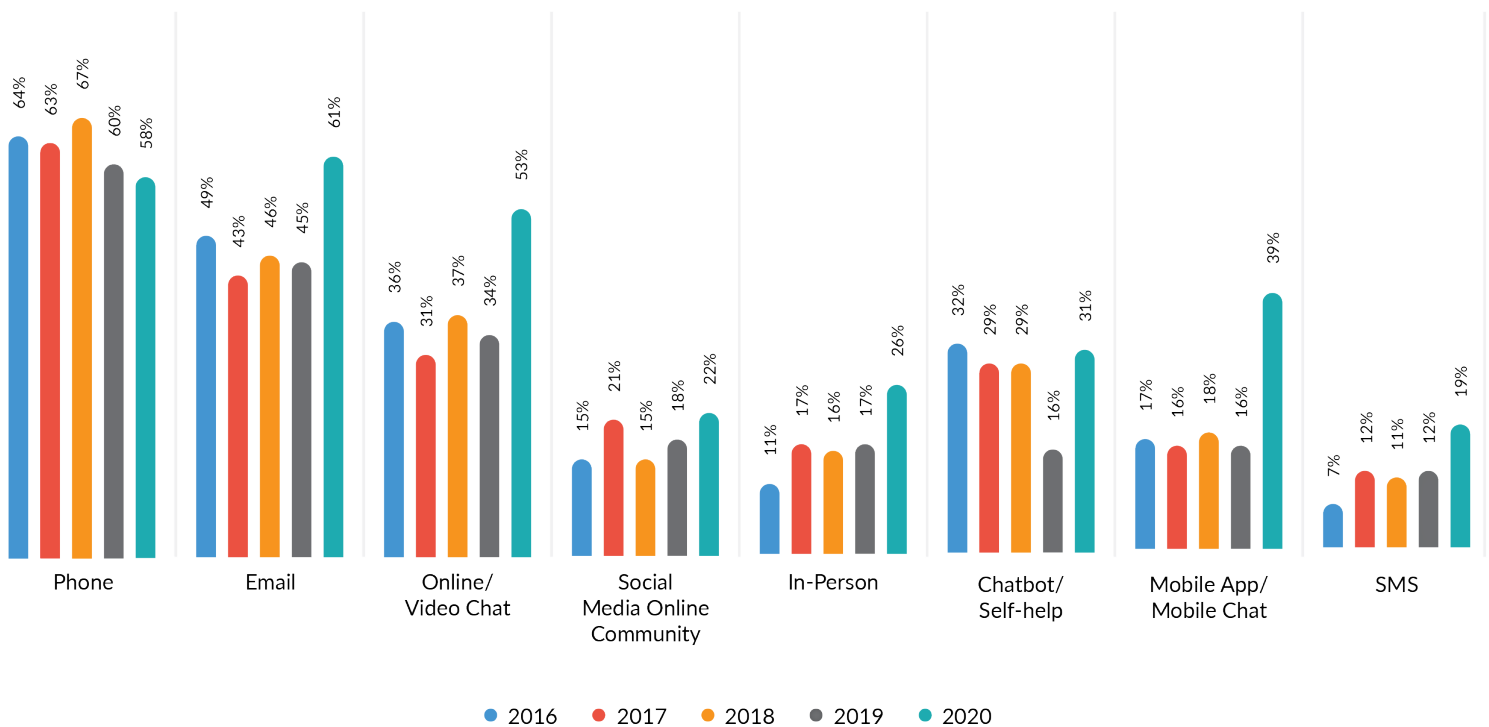
Our broader research findings also indicate that **2020 has not seen a significant drop in consumer satisfaction**. Specifically, issue resolution has remained reasonably stable, between 75% and 80% every year for the last five years, and satisfaction with self-service technology has slightly increased.

CHAT'S EMERGENCE AS A WIDELY USED, MAINSTREAM CHANNEL

Phone remains one of the main channels consumers use when contacting brands, but as a relative proportion of all channels being used, phone usage continued its long-term trend downward in 2020.

However, there was a significant increase in the proportion of consumers who stated they had used online chat, video chat, and mobile chat. In fact, the data shows that **almost twice as many consumers used chat in 2020 compared to previous years.**

Within the past 12 months, which contact channel(s) have you used to engage with a brand's customer care department? (Select all that apply.)

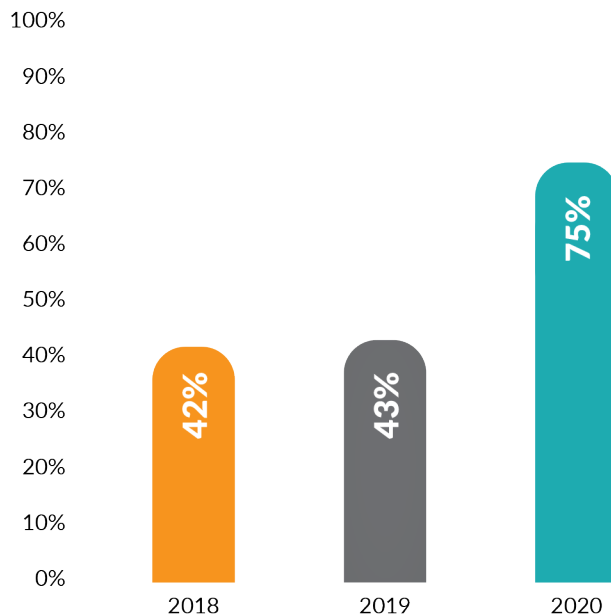


Why is chat usage increasing so much? Below are some of the hypotheses:

- Chat became a “go-to” channel for businesses during the initial stages of the COVID-19 pandemic when staff were working from home because the “at-home” work environment was more suited to staff handling chat transactions versus voice.
- More organizations have taken a strategic decision to migrate consumer interactions from voice to chat.
- Consumers have become more comfortable with chat, and as they find their issues are being resolved more frequently using the channel, they are more willing to use it for all their interactions.
- The technology has improved to a point where chat is now easily embedded into more websites and mobile apps, making chat more accessible to more consumers.

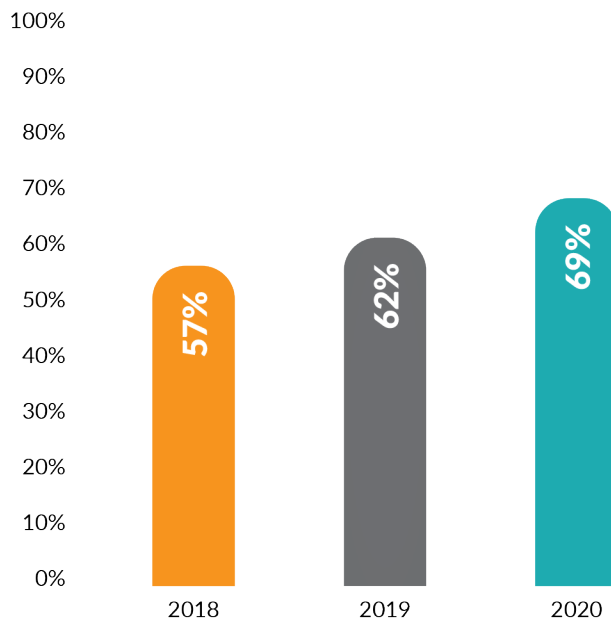
IMPROVEMENTS IN SELF-SERVICE TECHNOLOGY

Used Self-Service Technology in Last Three Months



The research indicates that consumers are using self-service technology much more than in previous years with a **32-point increase**.

Percentage of Customers Able to Resolve Issue via Self-Service Technology



The findings also indicate a higher percentage of consumers can resolve their issues via self-service technology this year, with a **7-point improvement**.

However, issue resolution remains much lower for consumers using self-service technology (69%) than it does for consumers who interact with live agents via phone, webchat, email, etc. (86%). This lower resolution rate has an impact on customer satisfaction and the likelihood of returning to self-service technologies for future issues.

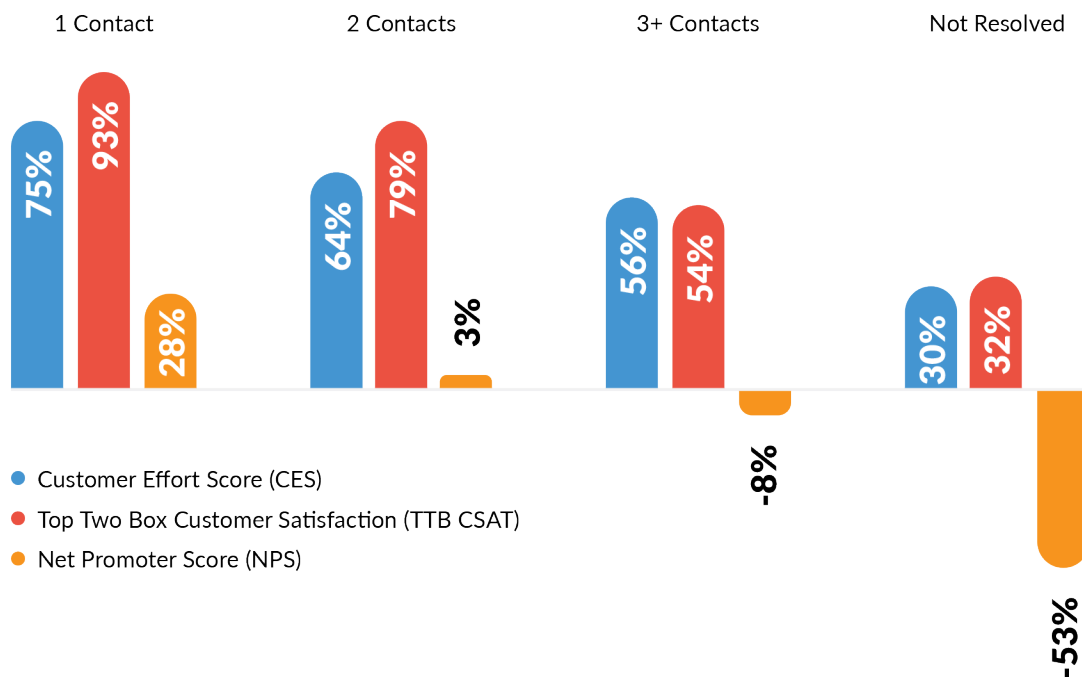
THE SERVICE JOURNEY'S IMPACT ON CX METRICS

This year's research reveals some interesting data related to how the length of the service journey (or the number of contacts involved in a service journey) can impact the consumer's perception of their experience.

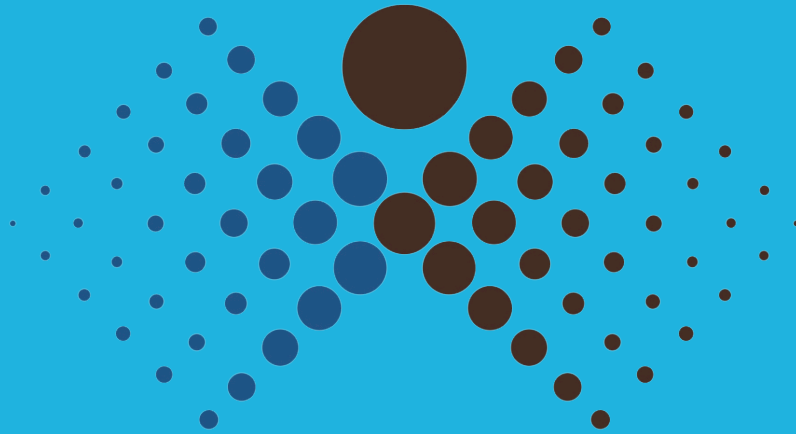
More than 50% of interactions take place within the context of a longer, multi-contact journey (also known as the service journey). To succeed in this environment, companies have started to focus their efforts on improving the horizontal service journey, rather than focusing solely on vertical service interactions.

The research indicates that for every contact a customer has to make to resolve their issue, there is an associated reduction in the results of the three most commonly used CX metrics – customer satisfaction, customer effort score, and net promoter score.

Impact of Issue Resolution on CX Metrics



Fundamentally, the data shows that to drive higher levels of satisfaction and to create more “promoters,” brands must design their services to make it easier to resolve customers’ issues at the first point of contact.



VISIT US ONLINE AT

WWW.EXECSINTHEKNOW.COM