



CREATING

FRONTLINE



MAGIC

THE SEVEN DAILY HABITS OF
WORLD-CLASS FRONTLINE TEAMS

Susanne Axelsson

Creating Frontline Magic: The seven daily habits of world-class frontline teams

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First published by AskNicely and Frontline Magic 2022

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First edition

ISBN: 978-473-62237-4

Written by Susanne Axelsson, Frontline Community Evangelist for Frontline Magic and AskNicely.

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In this book, we've distilled insights, ideas and expertise from frontline leaders into seven simple habits:

1

Set your service standard

2

Do one thing better

3

Get feedback to the frontline

4

Recognize achievement

5

Coach for small improvements

6

Connect the frontline to the bottom line

7

Un-mute the frontline

INTRODUCTION



The brands with the best experiences win

Disney's custodian employees are secret artists. They can dip their broom in a bucket of water and paint Disney characters on the sidewalk. In places like Florida, the sun dries the asphalt in a couple of minutes. But the experience stays with onlooking kids forever. They've just seen someone create Mickey Mouse, Goofy or Donald Duck out of thin air. That's pure magic.

This dedication to magical experiences flows through the entire company. It makes Disney the enchanting, engaging and successful organization that it is.

The entertainment giant isn't alone.

Around the world, the brands with the best experiences win.

Experience brands delight their customers in a myriad of ways and reap the benefits: While Disney conjures magic, Starbucks brews customization and Uber delivers effortless transport. Powered by stronger rates of repeat purchase and referrals, these organizations grow faster than their rivals. Magic happens at the human level. It sparks to life during the moments of interaction between their frontline workers and customers.

But here's the thing: These companies are in the minority.

Most organizations don't value their frontline workers. Neither do they empower, develop or cherish them. That's ridiculous. Frontline roles account for 80% of the working population. This is the largest class of worker on the planet. They're the single most impactful influence on customer experience. Ultimately, your customer experience can only ever be as good as the experience of your frontline people.

The world is out of balance.

Frontline workers bear this huge responsibility, but they're discarded as unimportant. They're under-served, under-paid and underestimated, so much so that people in frontline roles don't even want to be there. In some verticals, employee turnover is up over 150%. Just imagine having to replace your entire workforce every eight months!

Our job, and the whole purpose of this book, is to change all of that.

Over the past couple of years, we've been lucky enough to partner with the brightest and best experiential brands. We've watched their successes and learned from their missteps. After completing dozens of in-depth interviews with leaders at the world's best, like Starbucks, Disney and Barry's, we discovered that each of them operates around a set of daily habits.

In this book, we've distilled their insights, ideas and expertise into seven simple habits anyone can apply to their business:

1. Set your service standards
2. Do one thing better
3. Get feedback to the frontline
4. Recognize achievement
5. Coach for small improvements
6. Connect the front to the bottom line
7. Un-mute the frontline

When applied consistently on a daily basis, these habits create a powerful connection between each frontline employee and their purpose. It's reinforced through feedback, nurtured through recognition and refined through coaching.

Achieving frontline excellence can seem overwhelming—but we've structured the book in simple, easy to follow steps.

Chapter by chapter, we'll unpack each habit, exploring how leading companies operationalize their implementation. We've designed each habit to act as a practical guide, allowing any experience-minded organization to learn from the best and up their game.

To arrive at these powerful habits, we spoke to the leaders at the best frontline teams, including Disney veteran Dan Cockerell, former Starbucks executive Christine McHugh and Barry's operational executive Devin Murphy.

There's a lot to cover. So let's get started. Success starts at the FRONTLINE.

What you will learn...

You'll learn how Disney translated its Four Keys (that's their term for cornerstone service principles) into practical day-to-day behaviors. You'll see how Ritz-Carlton deployed huddles to ritualize frontline coaching and how food service company HMSHost created a culture of continuous improvement.

You'll discover how to leverage real-time feedback collection, deploy recognition to energize frontline employees and borrow the best coaching ideas from the world of sport. You'll learn how to connect your frontline to your bottom line, drawing a line between day-to-day service and the success of the company. Finally, you'll discover what happens when you un-mute your frontline and empower team members to share ideas and suggestions. (Spoiler alert: When Starbucks did so, they created the frappuccino.)



The awesome insights and stories* within these pages were generously shared by the following contributors:



Dan Cockerell

Former Vice President, Magic Kingdom - Disney

Featured in chapters 1,3,4 and 6

Dan is a Disney veteran with 26 years of experience at this iconic global brand. He graduated from college when Disneyland Paris (Euro Disney) was just opening and was one of the first employees to walk through the gates. After five years, he returned to the U.S. and continued his meteoric rise to management. By 2015, he was Vice President, Magic Kingdom, the most popular theme park in the entire world, overseeing 12,000 ‘cast members’ (frontline workers) who welcome around 20 million guests each year.

“
At Walt Disney Florida’s Magic Kingdom, expectations are always high. But 70,000 employees don’t create moments of magic by accident. When you challenge people to create magic every day, they get creative. They need room to be creative and create moments that are memorable.

“



Christine McHugh

Former Vice President, Customer Service and Operations Services - Starbucks

Featured in chapters 1,3,6 and 7

As her memoir From Barista to Boardroom hints at, Christine started off her career at Starbucks behind the counter. Over a 27-year tenure, she rose through the ranks — from Manager to Director and finally to Vice President. In her final role, she led operations for 13,000 stores in North America and managed a 100 person team, alongside a 600 person outsourced customer contact center.

“
The ‘Starbucks Experience’ has been built from thousands of hours of research around the world and countless data metrics that prove the formula works. Their service standard is ‘Make every moment right’ and the company’s strategy has been shaped around these expectations.

“



Scott Runkel

Former Vice President, Customer Experience - H&R Block

Featured in chapters 1 and 2

Scott's world revolves around three things: behavior, design, and data. He combines each element to build experiences and revolutionize processes, teams and lives. He's done this work — relationship-building, UX design and delivery, team-building and process creation — for companies moving into new worlds of technology and human experience, from starting up HP's first user-centered design consulting practice, to launching Carter's e-commerce channel and leading the creation of Whirlpool's cross-platform Smart Grid digital platform. Today, he helps cutting-edge companies establish human-centered cultures across teams and continents to build digital experiences that matter.

“

It's so important that teams see a connection between the work that they're doing, their team goals, and the highest level company goals so they can see that while we may be facing some chaotic times, their work and what they're doing today matters.

“



Josh York

Founder and CEO - GYMGUYZ

Featured in chapter 7

Josh is at the helm of one of the world's fastest growing fitness companies which boasts more than 250 locations, 400 personal trainers and 100,000 customers. He took his idea for in-home fitness training from his parent's dining room table to world domination in a handful of years. He's also a best-selling author and founder of the *Fuel your Drive* podcast. He's living proof of what a positive mental attitude and hard work can help you accomplish.

“

Frontline feedback should be funneled directly to a company's operations department - no delays; no red tape. Once that feedback arrives, the operations team should spring into action, pouring over the details and looking for anything they can fix or implement immediately.

“



Joe Thornton

**Executive Vice President/Chief Operating Officer - HMSHost
Former Director - Blockbuster Video**

Featured in chapters 1, 2, 3, 4 and 6

Joe is an operations executive and entrepreneur with 36 years of retail, executive management and human resources experience across brands including Starbucks, Jamba Juice and Blockbuster Video. Today, he helps American highway and airport food services company HMSHost maintain its operations across 300 brands and 1,500 food and beverage locations. He's a published author (including *The Power Of Or: Choosing And Doing What Matters Most*) and revered for his leadership across diverse fields including strategy development, project management, store re-engineering and consulting.

“
Creating a culture of improvement is crucial because if employees aren't receptive or willing to change, the quality, speed and accuracy of feedback is moot. It's all about turning gotcha moments into learning moments.

“



Devin Murphy

Senior Vice President Operations - Barry's

Featured in chapters 1, 6 and 7

Devin is the executive talent behind beloved fitness brand Barry's. She joined as Director of Operations in 2014 – right around the time the company was going global. A passion for fitness saw her rise through the ranks quickly as she applied her unique blend of management skills to an industry ripe for disruption. In her current role, Devin has helped bring the brand to fitness fanatics worldwide – including Denmark, Italy, Qatar, EAE, Australia, Paris, Mexico City, Singapore, U.K., Canada, Germany, Norway and Sweden.

“
If we make decisions based solely on data from a corporate office, we might miss something pretty big. Centralized performance data tells you when something is wrong. Qualitative insights reveal why.

“



Anna Egan

**Manager, Customer Experience and Business Development
- A1 Air Conditioning and Heating**

Featured in chapters 2, 5 and 6

Anna spent years on the frontline working as a product knowledge specialist and customer service rep before stepping into management. For the past 10 years, she's harnessed her personal experience, industry insights and empathy to help frontline workers achieve their potential. She currently heads up customer experience at the 50-person heating contractor, A1 Air Conditioning and Heating.

“

Building mastery in any frontline skill—customer communication, problem-solving, complaint handling, and so on—takes time. It takes multiple coaching touches, repeated practice sessions, and consistent reinforcement. It's like climbing a ladder.

“



Cheryl DeSantis

Chief People Officer & Diversity Officer - SmileDirectClub

Featured in chapter 6

Cheryl is a purpose-driven and values-based leader who believes in the power of courage, compassion, integrity and learning. She has worked across diverse industries including telecomm, professional services, start-up e-business, insurance and manufacturing. Her passion is inspiring, developing and motivating courageous leaders. At SmileDirectClub, Cheryl and her 100-person team drive a people-first agenda that enables exceptional business performance.

“

Every team member or employee needs line of sight. How does what they're doing every day contribute to the company goals? Printing out a giant pyramid of purpose poster and throwing it on the wall won't cut it. Frontline teams have been long ignored by management. If you want frontline workers to engage with the wider organization, you have to make the first move.

“



Charles Ryan Minton

Area General Manager - TPG Hotels and Resorts

Featured in chapters 4, 5, 6, and 7

As the author of *Thanks for coming in today*, Ryan is nearly as famous in the customer service industry as the hotels he's headed up. He's built a career in leadership at many of the world's most loved hotel brands, including Hilton, Marriott and InterContinental. He currently oversees more than 700 rooms for TPG Hotels and Resorts. On any given day, employees know that they'll find Ryan taking a long walk around the hotel listening to his employees and guests. The wisdom he has gained from years of listening is nothing short of stellar.

“

Frontline employees are the people who live and breathe the customer experience. If they're empowered to share that experience with leadership and make it right for the customer, that only helps you improve the customer experience.

“



Jerry Campbell

Former Director of E&I Ops Consumer Service - UnitedHealthcare

Featured in chapter 6

Jerry understands a thing or two about leadership. As a non commissioned officer, manager and leader in the U.S. Air Force, he helped people achieve their potential in extreme circumstances. Since leaving the armed forces, Jerry has headed up customer-centric teams at 7-Eleven, ServiceNow and UnitedHealthcare.

“

How can we relate individual goals to company goals in such a way that employees feel enthused? It goes back to expectations once they meet those goals. Frontline leaders must make rewards crystal clear to their employees. When people hit their numbers, you have to deliver those rewards—fast.

“



Jeremy Hyde

Director of Customer Service - Sun Country Airlines

Featured in chapters 2 and 4

Few people know contact centers like Jeremy. He's spent the bulk of his career in customer experience management, helping companies like Medica and UCare deliver an exceptional experience to their customers. He supports an incredible 1,800 employees and 3 million passengers in his current role.

“

If you're not able to connect the work someone is doing to the goals and aspirations of the organization, they start to feel like they're not a significant part of the success. When you do connect work to purpose, it's like you light a rocket under your employees.

“

CHAPTER I

SET YOUR SERVICE STANDARD



Set your service standard

WHAT'S INSIDE?

Outstanding customer experience means matching or exceeding your customer's expectations. Your service standard states precisely what customers can expect and tells your frontline workers what an exceptional experience looks like. Learn how to research customer expectations, design an impactful service standard, and empower your employees to live it every day.

When you walk into a ZoomCare urgent care medical centers, you notice something unusual: a 10-part service standard manifesto. Across the 10 commitments, there's a mix of ideas. There are foundational promises, the messages you'd expect to see at *any* clinic:

"Labs and imaging too!"
"Get meds from us."



But then there are the elements unique to ZoomCare, the ideas that take their service beyond the baseline:

"Your health records belong to you."
"Skip the ER."
"Get instant care with chatcare."

ZoomCare hangs this poster prominently in its waiting rooms for one key reason: So that every new patient understands what they're about. From the moment someone walks in, they know precisely what to expect from every nurse, doctor and technician. But it's not just there for them.

The clinic's frontline employees see the service standard manifesto every hour of every day. It's there when they clock in. It's there when they take lunch. It's there when they clock out. It's a constant reminder of the high standards the company sets.



Why does ZoomCare devote so much attention to their service standard?

It comes from a question posed by Dave Sanders, co-founder and former CEO of the clinic: “What if the patient, not the doctor, is the star of the show?” He likened the healthcare industry to the hospitality sector before McDonald’s – inaccessible, inconsistent, and unaffordable. Inspired by disruptive brands like Lyft, Instacart, and, of course, McDonald’s, Dave (ZoomCare) built his business around his patients’ wants, needs, desires and preferences.

His company’s promises to customers formed the basis of their relationship. They determined if patients were interested in what he was offering and whether they could trust him. They influenced whether someone walked away happy or headed to social media to leave a scathing review.

It’s the same everywhere—whether you’re in healthcare or hospitality; arts or entertainment.

With frontline employees, that same service promise is the key to defining what an awesome experience looks like.

If your employees are clear on what you’re promising, it’s easier to understand how to carry out that promise in a way that meets—or hopefully exceeds—expectations.

What you will learn...

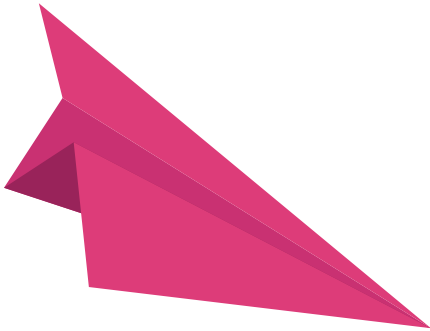
In this chapter, we’ll explore how great service standards start with a deep understanding of customer expectations.

We’ll then discuss how to best build a powerful service standard and empower your employees to live it every day.

Finally, we’ll touch on the risks of defaulting on the promises you make to your customers.



Research your customers' expectations



Before the pandemic, airplane travelers wanted one thing: speed. Get them into the airport as quickly as possible. Whisk them through security with minimal delay. Board them smoothly and deplane them swiftly. They even expected quick service at peripheral businesses—restaurants, bars and shops.

“If there was a restaurant on the left and a restaurant on the right, typically passengers choose the one with the shorter line,” says Joe Thornton, Executive Vice President/ Chief Operating Officer for HMSHost, a major airport food service company. “That may not necessarily be the brand or the food type that they were looking for. Speed plays an incredibly important role.”



All of that changed with the COVID-19 pandemic.

When the crisis shut down the travel industry, Joe (HMSHost) began searching for changes in his customers' expectations. He surveyed travelers, devoured industry reports and pored over internal insights. He learned that airplane travelers had a new demand: safety.

By analyzing the current needs of passengers, rather than relying on what worked in the past, Joe (HMSHost) and his team updated their customer service approach to address the new expectations of customers. They introduced socially distanced food lines even though they increased wait times. They added sanitization stations even though they increased congestion.

This sort of research underpins all great service standards. You need to be crystal clear on what, exactly, your customers expect from your brand. Being able to break those expectations down and explain them to your frontline workers will help to create the story of what excellent customer service looks like.





Top tips to understand customer expectations



- ✓ Before you write your service standard, talk to your customers. Learn what they expect and want from your brand and use that as the core for your promise.
- ✓ Use empathy interviews and open-ended questions to surface specific examples of good, bad and great interactions.
- ✓ Customer expectations change over time, especially during major disruptions like the COVID-19 pandemic. Re-run research regularly to track changes.



Make your promise simple and clear

A couple of years ago, Dan Cockerell, former Vice President, Magic Kingdom for Disney, spotted a confused-looking couple walking through Disney's Magic Kingdom. They had a map out and were squinting at the details, trying to figure out where they were.

All Disney employees are trained to look out for maps. If someone has a map out, that's an opportunity to offer assistance and help someone out. So Dan (Disney) walked over with a big smile on his face and asked if they were looking for something in particular.

It was then that he noticed someone weird: the map was blue. Disney doesn't have blue maps. When he looked closer, Dan (Disney) realized it was a map for Universal Studios, a different theme park located about 20 miles down the road.

Looking embarrassed, the guest asked if they were in the wrong theme park.

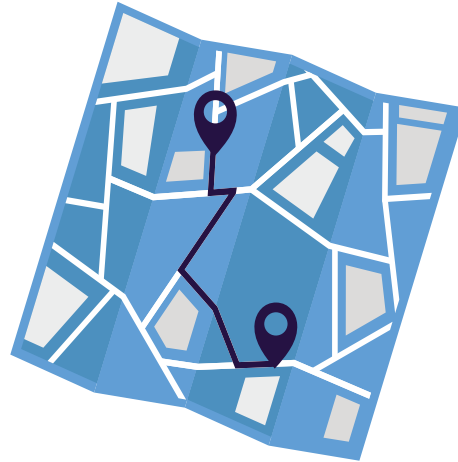
"Sir, you're not in the wrong park, you just have the wrong map," Dan (Disney) told the couple. "Let me get you the right map."

He disappeared for a couple of seconds and returned with a map and a bunch of tickets to get past the lines.

"I took a potentially negative moment and turned it into a positive moment," he says, reflecting on the experience. "I had to find a way to make it positive for them."

At Walt Disney Florida's Magic Kingdom, expectations are always high. People save and plan for years to go on dream vacations with their families, and part of the reason so many keep coming back is the magic they experience while they're there.

But 70,000 employees don't create moments of magic by accident. Disney's customer experience rests on The Four Keys—its foundational service standards— Safety, Courtesy, Show and Efficiency.



Disney's best practices

Your service standard won't look exactly like Disney's—but you can borrow their best practices:

Length

People can only remember between five and nine pieces of information in their short-term memory. Limit your service standard to no more than nine bullet points to keep it punchy and memorable.

Promises

Use each bullet point to describe a promise or commitment to your customers.

Expectations

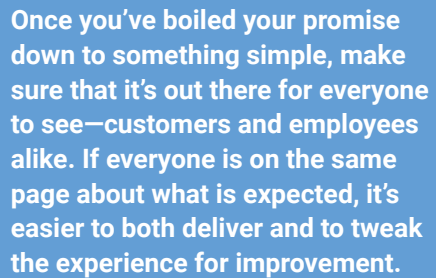
Don't leave promises vague or unexplained. Set tangible customer expectations for each bullet.

Table stakes

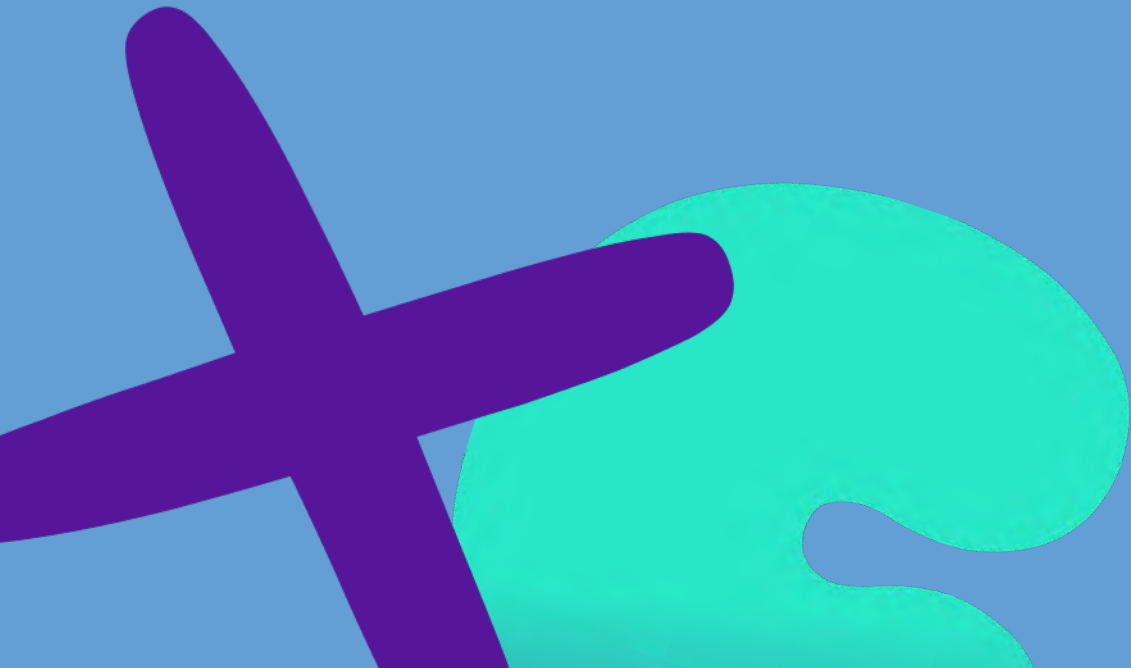
The basics matter—a lot. Include the basics expected in your industry. Think safety in air travel; hygiene in hospitality and so on.

Differentiation

Your service standard should define the customer experience at your organization. Double down on the elements and ideas that make you different and unique.



Once you've boiled your promise down to something simple, make sure that it's out there for everyone to see—customers and employees alike. If everyone is on the same page about what is expected, it's easier to both deliver and to tweak the experience for improvement.



At Disney, each Key comes with a handful of behaviors, showing what efficient or courteous service looks like day-to-day.



Safety

- I practice safe behaviors in everything I do
- I take action to always put safety first
- I speak up to ensure the safety of Others



Show

- I stay in character and perform my role in the show
- I ensure my area is show-ready at all times



Courtesy

- I project a positive image and energy
- I am courteous and respectful to Guests of all ages
- I go above and beyond to exceed Guest expectations



Efficiency

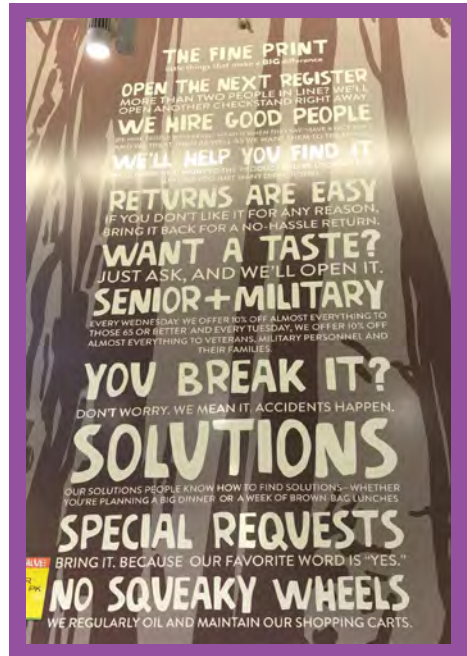
- I perform my role efficiently so Guests get the most out of their visit
- I use my time and resources wisely

Disney weaves both its Four Keys and their behaviors through its employee training. When employees eventually make it to the frontlines, managers audit their behaviors and reinforce performance daily.

Other organizations like New Seasons Market physically display their promise up on the wall for everyone to see.

The fine print hangs behind every checkout at the Portland-based grocery chain. Every time a customer comes in to shop or a frontline worker clocks into their shift, they see it.


When this distinct message becomes part of an employee's daily routine, the ability to live up to the promise becomes second nature. With the right training, along with modeling from leaders, excellent customer service can become what your brand is known for.





Top tips for setting your service standard



- 
- ✓ Condense customer expectations down into a small set of service standards. Make sure they're simple and easily understood.
 - ✓ Translate values or principles into behaviors. Without examples, it's tough for people to visualize what service standards really mean.
 - ✓ Publish your service standard—both internally and externally. Ensure everyone involved in an interaction knows exactly what to expect.



Empower employees to solve customer problems

It was getting late in the day when a husband and wife sat down for dinner at a restaurant in the Magic Kingdom. The park was emptying out, the sun was going down and employees were leaving for the day. The server began talking to the couple, asking about where they were from and how they were enjoying their trip.

During the conversation, he learned something heartbreaking. The wife had Alzheimer's and her memory was slipping. She admitted that this would be her last trip to the theme park.

The server talked to his manager and arranged special access for the couple into the park. It was after-hours and the place was deserted. They fired up the sound system and the couple danced in front of the castle, completely alone with each other.

Letting guests into the park after hours isn't in Disney's standard operating guidelines, but the server recognized that was an opportunity to create a moment of magic.



“When you challenge people to create magic every day, they get creative,” says Dan (Disney). “They need room to be creative and create moments that are memorable.”

Being able to act on common sense—to deliver on the brand promise with immediacy and authenticity—requires a level of trust between management and employees. When work is too much about rules and rote learning, the truly human part of connecting with people gets lost in bureaucracy.

According to research by Gallup, only 27% of U.S. employees feel their organization consistently delivers on the promises they make to customers. This could be because they don't feel empowered to take their interactions to the next level for fear of going 'off book'.

“Empowerment is a business strategy,” says Dan (Disney). “And it pays back a hundredfold in the future.” Giving frontline workers space to be creative in how they interpret your service promise—along with measures in place to provide consistency—makes for a more engaging customer experience.

He adds: “When you come back to your room, maybe all your stuffed animals are sitting on the bed, watching the Disney channels. Or maybe housekeeping has folded towels into swans.”

The spirit, not the letter, of the law

Of course, it's only easy to feel empowered once you've been properly trained. **A solid knowledge base can make all the difference in creating a frontline workforce that's so sure of what they're delivering, they can focus on how they deliver it best.**

Starbucks sees itself as a 'third place' for its customers. Their stores offer "Somewhere to relax and feel comfortable after their first (home) and second (work) places," says Christine McHugh, Former Vice President, Customer Service and Operations Services for Starbucks. Crafting the third place experience wasn't easy. It took thousands of hours of research, countless data metrics and endless experiments. But eventually, they landed on a formula that worked.

“

The Starbucks service standard is 'Make every moment right'. That same service standard is a direct reflection of what really matters to Starbucks customers and the company's strategy has been shaped around these expectations.

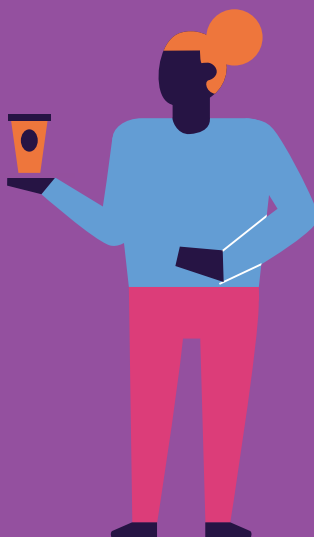
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Christine (Starbucks)

“We put the structure where it needs to be, but that standard allows freedom for human connection,” says Christine (Starbucks). At the company stores, interactions weren't scripted, they happened organically, doubling down on the feeling of community and connection Starbucks aimed to achieve. Because their promise was easy to memorize, knowing what to do became second nature for employees. Was a coffee order wrong? Replace it, no questions asked, no need to follow a series of bureaucratic steps while the customer continued to wait.

“Don't overscript your employees, but have guidelines,” suggests Christine (Starbucks).

There are already so many steps to learn in a new job that require specific regulations—exact drink recipes, how to clean equipment, safety procedures—that when it comes to customer service, **consider writing more of a playbook and less of a rule book.**





Top tips for empowering employees



- ✓ Set ambitious standards for frontline employees, but don't overly script their interactions. Trust in their creativity and ingenuity and they'll find a way to make magic happen.
- ✓ Communicate trust and empowerment. Many employees are used to operating in rigid workplaces and need encouragement to act autonomously.
- ✓ Create guardrails and checks to ensure people don't veer too far from standards.



The risks of defaulting on a promise

At 4:30 in the morning, Devin Murphy, Senior Vice President Operations for Barry's, received a call on her cell. It wasn't good news. A burst pipe had caused a leak in one of Barry's New York studios and all the power was out. She knew it couldn't have happened at a worse time. Early morning clients were already on their way and it was too late to cancel their class. In half an hour, people would turn up, expecting a lung-busting workout.

Devin (Barry's) knew they had to act fast.

The fitness brand promises that their workouts will be the highlight of their customers' day. What's more, they pledge to be "tenacious in our pursuits to create value." Being beaten by a burst pipe simply wasn't an option.

"We did the 5:00AM class by candlelight," she says. "It was a unique experience all of its own."

It turned a potential default into a memorable moment. But Devin (Barry's) and her team knew they'd only bought themselves a little time. They had classes booked every hour on the hour throughout the day. She put the call out to neighboring studios, asking who had space. She found a spare slot here and a spare slot there. Eventually, she had enough capacity for all the out-of-action studio's clients.

The next challenge: how to get people from one studio to the other.



Devin (Barry's) began calling every studio in New York, asking them to order an Uber SUV to the closed location. When clients arrived, she could shepherd them into a waiting taxi and whisk them off to Barry's Chelsea, Barry's NoHo or Barry's TriBeCa.

"Everyone who showed up got a spot," says Devin (Barry's). "They got a nice ride to another studio. They got to meet a couple of people on the way. They got to experience a new studio. It left people feeling that Barry's went above and beyond for them."

"

Once you set your service standard, living up to it is paramount. There are more competitors than ever, across industries. The digitization of commerce also means you're competing with companies the world over, and customers know when something feels too good to be true.

"

Devin (Barry's)



What are the risks of not delivering on a promise to a customer?

"Lost revenue, lost loyalty, brand reputation, word of mouth," says Christine (Starbucks). Customers go somewhere else and employees too, which results in the loss of money, time and institutional knowledge.

"The [Starbucks] crew loves their regular customers, they're part of their community," she says. "If managers lose employees at the fault of the store, there's a loss in the community. It impacts team spirit." And when employee experience is so closely tied to customer experience, that kind of impact can be felt on the other side of the register or phone line.

For some businesses, the service they provide leaves an impression that has to last a lot longer than grabbing a daily cup of coffee to go. Tax preparation company H&R Block sometimes has just one shot a year at making a good impression.

"The seasonality of our business is really interesting," says Scott Runkel, former Vice President, Customer Experience for H&R Block. Their customers expect to learn about the tax filing process with transparency and authenticity and to be guided through what can be a very stressful process.

“Some people rely on their tax return to put food on the table,” says Scott (H&R Block).

“

If we don't deliver on our promises, it's possible we'll retain customers but our credibility and their trust in us decreases over time.

“

Scott (H&R Block)

A decrease of trust, especially when dealing with sensitive or personal materials, erodes the brand and takes you further away from the human side of your business.

That's what makes customer service so important: it places the people who buy or sell your product at the center. “That's a timeless principle,” says Scott (H&R Block). “It will always be relevant no matter how advanced technology becomes.”

Setting your service standard is foundational to providing excellent customer service. Knowing what customers expect of your brand, teaching your employees how to deliver on your promise, and empowering your frontline to do it authentically ensures that the customer is at the center of everything you do.



Making sure your actions align with your standards also comes down to role modeling from the top down. “At Magic Kingdom, it's the employees that deliver the experience every day. It's not the executive that does that,” says Dan (Disney). “It's important that executives understand firsthand that's where the magic happens. That's how you build culture.”

Ask yourself and your team, at every level: “How does everything we do in leadership and management lead to that?”





Top tips for avoiding letdowns

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- ✓ Connect performance and results. Communicate the risks of defaulting on promises—whether that’s reflected in performance reviews, compensation, availability of hours or something else. When frontline workers understand the consequences, they’ll work harder to maintain excellent standards.
 - ✓ Mistakes and errors *will* happen. When things go wrong, what’s important is how you react. Empower frontline employees to make customer interactions right—whatever that takes.
- 









Make it happen

Customer experience is *everything*. “It’s the entire experience,” says Customer Service and Experience Expert Shep Hyken. “It’s every interaction, human or otherwise, that you have with the brand.” That’s why your service standard is so important. It’s the foundation for *everything*. It’s the North Star frontline workers use to guide their attitude and the manual they use to guide day-to-day behaviors.

The process of setting your service standard need not be daunting.

Here is a quick checklist to get you started:

Let's get started	Notes
 Find a tool to collect frontline feedback. <input data-bbox="510 725 563 782" type="checkbox"/>	
 Ask your customers a simple question to understand what they care about. <input data-bbox="510 878 563 935" type="checkbox"/>	
 Analyze your responses, searching for themes. <input data-bbox="510 1029 563 1086" type="checkbox"/>	
 Use your themes to create an impactful and personalized service standard. <input data-bbox="510 1180 563 1237" type="checkbox"/>	
 Communicate your promise loud and proud. Tell your customers and your team. Repeat your promise—again and again and again. <input data-bbox="510 1348 563 1406" type="checkbox"/>	
 Create a set of guardrails that describe what it means to <i>live</i> your service standards. Train your team on what's acceptable and what's not. <input data-bbox="510 1520 563 1578" type="checkbox"/>	

CHAPTER II

DO ONE THING BETTER



Do one thing better

WHAT'S INSIDE?

Great service standards are ambitious and aspirational. Turning them from theory into action can seem daunting. But small improvements achieved daily can drive monumental compounding effects over time. Learn how to ritualize improvement to your service standard, set impactful goals and partner with frontline workers along the way.

Every morning at every Ritz-Carlton hotel, resort and residence starts the same way: a huddle.

The entire staff meets for the Daily Line-Up. It's a quick-fire 10-minute meeting designed to 'warm up' frontline workers and reinforce the hotel chain's service standard.

From *The Upside of Daily Line-Up* by Ritz-Carlton: "Employees benefit from an activity that will provide a transition from the mindset they 'brought in the door' to the mindset your organization would like them to bring to customers. The Daily Line-Up gives employees the opportunity to shift gears to a work mentality before they ever meet a customer."



During the Daily Line-Up, local teams discuss one of the company's 12 service values:

1.

I build strong relationships and create Ritz-Carlton guests for life.

4.

I create a work environment of teamwork and lateral service so that the needs of our guests and each other are met.

7.

I understand my role in achieving the Key Success Factors, embracing Community Footprints and creating The Ritz-Carlton Mystique.

10.

I continuously seek opportunities to innovate and improve The Ritz-Carlton experience.

2.

I have the opportunity to continuously learn and grow.

5.

I am always responsive to the expressed and unexpressed wishes and needs of our guests.

8.

I protect the privacy and security of our guests, my fellow employees and the company's confidential information and assets.

11.

I own and immediately resolve guest problems.

3.

I am involved in the planning of the work that affects me.

6.

I am empowered to create unique, memorable and personal experiences for our guests.

9.

I am responsible for uncompromising levels of cleanliness and creating a safe and accident-free environment.

12.

I am proud of my professional appearance, language and behavior.

They talk about how they've seen the value lived, sharing 'wow' stories like the time the hotel manager at Ritz-Carlton Bali flew in special ingredients from Singapore to account for a guest's allergies. They discuss how they can operationalize each value. They also set small goals related to the day's specific value.

“The daily lineup is the most important vehicle we have at Ritz-Carlton to keep the culture alive. Every single day, 365 days a year, three times a day (because there are three different shifts) we have our lineup and we cover the 12 principles in rotation. One thing I want to stress is to always keep the lineup short. It shouldn't be longer than fifteen minutes because if it is, it's a meeting and nobody needs another meeting in their day!” says Diana Oreck, former Vice President of Ritz-Carlton Leadership Center.

This push for continuous improvement is a cornerstone of world-class service. In fact, it's an open secret for all success. **If you achieve small wins every day, you drive outsize gains over weeks, months and years.**

“Every day you may make progress,” said Sir Winston Churchill. “Every step may be fruitful. Yet there will stretch out before you an ever-lengthening, ever-ascending, ever-improving path. You know you will never get to the end of the journey. But this, so far from discouraging, only adds to the joy and glory of the climb.”



What you will learn...

In this chapter, we'll reveal how to reinforce your service standard every day so people don't forget your expectations and become better frontline workers.

We'll explore how to ritualize improvement to drive daily improvement. We'll connect continuous improvements to day-to-day operations and reveal how to translate customer service standards into impactful goals.

Finally, we'll show how you can harness your employees to drive execution.

Ritualize improvement

Want to know the secret behind Michael Jordan's six NBA titles, six Finals MVP awards and five regular season MVP awards? He wore two pairs of shorts. Okay, perhaps his natural talent and unparalleled dedication to the game were the main factors in his success—but his shorts helped, too. It was his pre-game ritual. He'd pull on his blue UNC college shorts and then his red Chicago bulls shorts. Then, he'd put in one world-class performance after another.

This isn't just sporting superstition. Science shows that rituals work.

“Rituals performed before high-pressure tasks—like singing in public—do in fact reduce anxiety and increase people's confidence,” wrote Harvard Business School professors Francesca Gino and Michael Norton. Lucky ties help people in interviews and humming favorite songs soothe pre-date jitters. They soothe anxiety and focus the mind. They help people get their ‘game face’ on.

In the workplace, rituals can move the needle on continuous improvement, transforming a middling tactic into an operational superpower.

Ritz-Carlton's Daily Line-Up is one of the best examples, but it's far from the only one.

Every Starbucks store opens with a partner meeting. The whole team comes together to read messages from the coffee chain's head office, hear from the shift supervisor and share their personal focus for the day.

It gives them a moment to reset their mindset, audit their performance and home in on what's most important for the day.



Australian airline Jetstar follows a similar routine. Before each flight, cabin crew meet in the crew room or aircraft for a short huddle. They discuss basic information like flight times, crew, aircraft type and passenger loads.

On top of that, they share important information about the day ahead—communication processes, emergency procedures and service standards. Like at Starbucks, the briefing is an opportunity to mentally reflect, reassess and get ready for the day's work.





Top tips for running an awesome huddle

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- ✓ Keep it short, sweet and snappy. Ten minutes is great. Fifteen is okay. But when huddles take longer than 20 minutes, minds begin to wander.
 - ✓ Focus on one thing and one thing only. When you talk about everything, people hear nothing. Keep each huddle laser-focused on a theme, value or goal.
 - ✓ Give employees something tangible to do. Information and idea-sharing is great, but employees should leave a huddle with a clear idea of what to do next. Set goals and discuss simple ways to achieve them.
 - ✓ Don't dictate. Huddles aren't another leader-led training session. They're supposed to be team activities. Encourage individual employees to lead the daily huddle. Make it engaging and fun.
- 



Connect service standard and goals

The ancient Greeks have a story about a king called Sisyphus. After tricking the Gods, he was punished by being forced to roll an enormous boulder up a hill. When he reached the top, the rock would roll back down and he'd start again. Up and down. Up and down. It was endless work without any purpose or payoff.

So why are we talking about an ancient Greek king?

Because people need meaning in their work. When you tell someone to do something without explaining why, you're locking them into a life like Sisyphus'.

"If you're not able to connect the work someone is doing to the goals and aspirations of the organization, they start to kind of feel like they're not a significant part of the success," says Jeremy Hyde, Director Of Customer Service for Sun Country Airlines. "This is the starting point. Every organization needs to start here."

However, when you do connect work to purpose, it's like you light a rocket under your employees. At organizations with an effectively communicated mission, financial performance spikes 42% above the industry average. That's like adding an extra two workdays.

To create that connection, you have to build out the service standard you identified in chapter one.

SUCCESS - ONE ACTION AT A TIME

Imagine a home improvement retail chain. Let's call it Jarvis Depot. Now, lets say their customer service org set their service standard, one section of which reads: "We address 100% of the customer's questions." That's an ambitious objective. Frontline workers can't magically make it happen overnight.

As management experts Gary Keller and Jay Papasan wrote in their book, *The One Thing*: "Success is built sequentially. It's one thing at a time."

So what's one thing you can give employees to focus on today? What's a single, achievable goal that contributes to the service standard? Here are some ideas:



Record each question as the customer says it.



Ask the customer if they have any remaining questions at the end of the call.



Send a followup email asking if the customer felt their query was answered.

Remember to tie each daily goal back to the service standard. Make it clear why you're asking frontline employees to ask a new terminal question or manually record customer queries.

"It's so important that teams see a connection between the work that they're doing, their team goals and the highest level company goals so they can see that their work matters," says Scott Runkel, former Vice President, Customer Experience for H&R Block. "They can see that while we may be facing some chaotic times, what they're doing today matters."

But connection is only half the story.


Crafting powerful goals is a skill. It's easy to go too abstract, overly specific or too ambitious. There's a sweet spot in the middle—and you have to find it. The good news is that we have a framework to get you there.





Top tips for transforming your service standard into goals



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- ✓ Start with your service standard and ask, “What is one thing I could do to improve our performance?” Say Jarvis Depot wants to deliver a personable service. Their single, achievable objective for the next day could be: Practice the 20-10 Rule with every customer in the store. (A wave when a customer comes within 20 feet and a verbal interaction if they pass within 10.)
 - ✓ Relentlessly communicate how each goal impacts your service standard. At Jarvis Depot, store managers could reinforce daily goals during morning huddles and weekly one-to-ones. They could feature it in the weekly employee newsletter and fix a poster in the break room. Overcommunicate until it sticks.
 - ✓ Always include the why. For the Store Manager at Jarvis Depot, that means telling frontline workers why personable service is important. It drives a better customer experience, increases loyalty and helps the store perform better. Never expect frontline workers to do something just for the sake of doing it.



Use goal-setting frameworks

The difference between a good goal and a bad one is immense. Unattainable objectives demotivate people. Vague targets distract them. Give people a brief without a deadline and they'll forever kick the can down the road. But just as poor goals derail teams, good goals can inspire them to greatness.

When psychologists tested the impact of different motivational techniques, goal setting blew the alternatives out of the water. If a manager gave their team a handful of specific, ambitious goals, their team's performance leaped into the 80th percentile.

When they combined the goal with a means of measuring progress, performance jumped again—up to the 88th percentile.

So how do you create these wonder goals?

For years, people used the SMART framework: Specific, Measurable, Achievable, Relevant, and Time-bound. But that method has its problems. It doesn't encourage long-term ambitious endeavors, and it lacks a necessary connection to purpose.

Recently, we've seen a new breed of improved frameworks gaining traction.

PACT is one. It's four components are:



P

Purposeful

Your goal is connected to long-term objectives or missions.

A

Actionable

You can take action today to drive results in the future.

C

Continuous

Good goals are repeatable, creating reliable routines and habits.

T

Trackable

Not measurable, but trackable. You don't necessarily need to be able to quantify progress, but you do need to know if you're moving forward.



Another option is **FAST**:

Frequently discussed

Don't wait until the day before your deadline to assess performance. Embed goals into ongoing discussions to stay nimble.

Ambitious

Great goals make you stretch your abilities and push yourself out of your comfort zone.

Specific

Translate expected results into concrete metrics that create clarity on achievement.

Transparent

Make goals and progress public to create accountability.

"FAST goals help organizations improve along multiple dimensions at the same time," wrote Donald Sull, Senior Lecturer at MIT Sloan School of Management, and Charles Sull, Partner at Charles Thames Strategy Partners.



"By making goals transparent, for example, companies enable employees to align their activities with corporate strategy and to coordinate more effectively across silos."

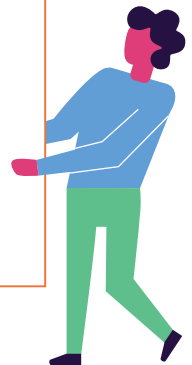
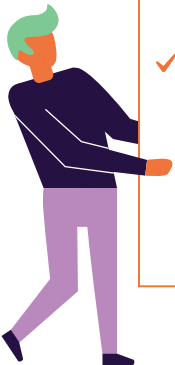
Impactful goals focus your attention, energy, and resources on small, achievable tasks. They encourage employees to drive immediate impact, rather than betting on frivolous moonshots. As well as driving improved performance, they help people personally, too.

According to business journalist Tony Schwartz, around half of people experience burnout, not because of the volume of their workload, but because of task-switching and multitasking. These tightly-targeted goals cut out distractions and noise.



Top tips for designing impactful goals

- 
- ✓ Test out goal-setting frameworks like PACT and FAST and select the one that works best for your organization. Use it to craft goals that actually inspire frontline workers.
 - ✓ When you've set your goals and what you are trying to accomplish, make sure it is easy for people to act on every day. Break big objectives into daily, weekly, quarterly, or yearly goals. Don't let your attention wander or your ambition take over. When people focus on *everything*, they focus on *nothing*.
 - ✓ Tailor goals to each frontline worker. Use customer feedback to identify individual improvement opportunities. Use goals to address weaknesses and reinforce strengths.
- 



Partner with employees to set actions

Joe Thornton, Executive Vice President/Chief Operating Officer for HMSHost, isn't afraid of a challenge. Not only did he join HMSHost, the company behind nearly all North American airport hospitality locations, but he did so in 2020, right at the start of a global pandemic that mothballed the travel industry for months.

"I started this job on March 9, 2020," he says. "On day two, we shut down the airports. It's been a grow back process ever since."

And grow back he has done. Joe (HMSHost) successfully guided the company's 1,500 food and beverage locations through crisis and back to stability. He did it not with a dictatorial iron fist, but through cooperation, collaboration and partnership.

Early on in his tenure, he realized he wasn't dealing with a homogenous workforce. HMSHost works with brand partners like Starbucks, Shake Shack and Pret. There are also local chains like Blanco, Columbia Cafe and Tortas Frontera. They even operate a handful of proprietary brands, developed especially for the airports. And they're everywhere, from Alaska and Alberta to Austin and Orlando.

Every restaurant is unique, he says. That includes physical characteristics, like square footage and operational considerations, including atmosphere. Joe (HMSHost) knew he couldn't create a generic countrywide goal and leave each location to work out the execution details. So he went deeper, working with local teams to sketch out a plan for how they would achieve each goal.



“

You have to partner with employees, setting actions that will help them deliver goals,” he says. “Otherwise, many times companies have ended up with unintended consequences. People will work on the target, but they may do things that they shouldn’t to deliver the number.

“

Joe (HMSHost)

He recommends customer service and experience leaders meet with local teams and ask, “What actions or behaviors will help us achieve that goal?” Sketching out action plans helps double check whether goals are attainable and they bias teams towards action. But there’s another benefit, too. By discussing possible execution plans, leaders can warn frontline teams off potentially harmful or detrimental behaviors.



Say local managers want to run a marketing campaign that’s misaligned with the company’s service standard, corporate leaders can warn them off the idea. Or if a restaurant manager wants to add extra tables that would take them over capacity, they can refer them back to health and safety guidelines.

Creating those behavioral guardrails is key for all organizations, not just companies with hundreds or thousands of autonomous teams.





Top tips for creating plans of action

- 
- ✓ Don't assume you know better than frontline workers. They're in the trenches every day and have unparalleled insight into what ideas will work and what tactics will fall flat.
 - ✓ Set ambitious goals and work with employees to plan how you'll achieve them. Break down goals into manageable projects and tasks. Then assign responsibility.
 - ✓ Remember to construct guardrails. Ambitious targets without behavioral safety checks can lead to unethical tactics.
- 



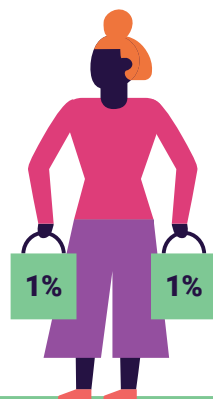
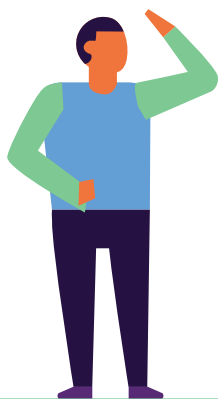
Small wins compound into big improvement

One percent doesn't sound like very much. On the frontline, a 1% improvement means an extra smile here and warm welcome there. It's pocket change. Such small changes don't stay small for long, however.

If you commit to continuous improvement, even small actions compound over time.

Start on New Year's Day and a 1% daily improvement will make you three times better by Easter. By Halloween, you're up to 11 times your baseline performance. Come New Year's Eve and you've hit 37X improvement.

"In the beginning, there is basically no difference between making a choice that is 1 percent better or 1% worse. But as time goes on, these small improvements or declines compound and you suddenly find a very big gap between people who make slightly better decisions on a daily basis and those who don't," writes James Clear, author of *Atomic Habits*.



Make it happen

Translating your service standard into daily action can seem like a huge task. **Here's a 90-day roadmap to get you started:**

	Time	Task	Progress
	Today	Select a goal-setting framework like FAST or PACT for your organization.	Complete <input type="checkbox"/>
	Next week	Design improvement rituals (huddles, morning meetings, one-to-ones) for your teams.	Complete <input type="checkbox"/>
	In 2 weeks	Translate your service standard into single, achievable goals for teams or individual frontline workers.	Complete <input type="checkbox"/>
	This month	Work with managers to implement your daily improvement rituals.	Complete <input type="checkbox"/>
	In one month	Work with frontline employees to identify new improvement strategies.	Complete <input type="checkbox"/>
	In 3 months	Trial different goal-setting frameworks to discover what works best for your organization.	Complete <input type="checkbox"/>

CHAPTER III

GET FEEDBACK TO THE FRONTLINE



Get feedback to the frontline

WHAT'S INSIDE?

It's impossible for frontline workers to improve their performance without feedback. It's how they identify their strengths, weaknesses and opportunities for development. Learn how to collect customer feedback, analyze their responses and give your frontline workers the best chance at success.

Think back to the last time you took an Uber.

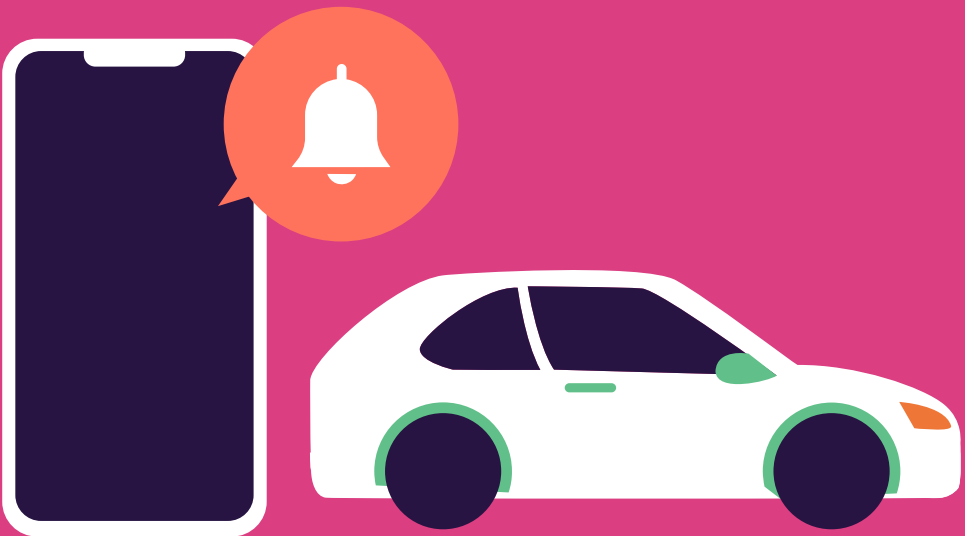
What happened the moment you stepped out of the cab and swung the door closed?

Your phone dinged, right?

It was Uber asking for a rating out of five stars on your driver and trip. That process is incredibly important to the company's frontline operations. It's how they maintain quality standards across their pool of drivers. When a driver falls below a certain rating threshold, Uber highlights the account for a warning or ban.

But the company's feedback system isn't just about correcting mistakes and poor service.

From *'Sometimes, 5 stars just isn't enough'* by Uber: "Sometimes the little things make all the difference, and 5 stars doesn't quite cut it. We get that and, while we know there's always more we can do to keep improving the driving experience, making it easier to thank the men and women who keep Uber moving seemed like a good place to start."



After you submit your feedback, the details ping straight to your driver's phone. It's real-time feedback and because it happens 'in the moment', it reinforces positive driver behavior or poor service to fix.

Uber set the standard for instant frontline feedback. Other businesses can learn a lot from their example.

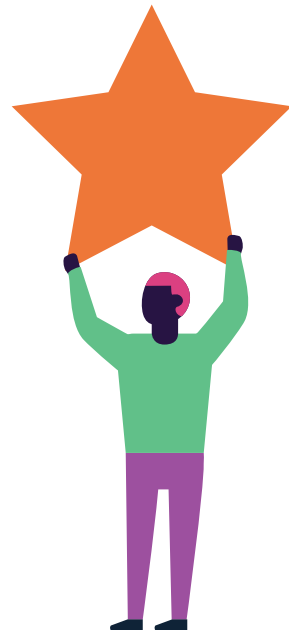
Frontline staff deserve (yes, deserve—it's a basic human right) feedback from the customers they serve. Not only that, but they should receive it fresh (same day is best), in a format that's easy to digest and act upon immediately.

However, making that right a reality is harder than it seems.

What you will learn...

In this chapter, we'll reveal how frontline leaders collect customer feedback directly after each moment of truth.

We'll also explore how to triage, analyze and systematize feedback, turning discordant noise into actionable insights.



Collect and analyze feedback as quickly as possible

Years ago, when a guest left Disney's Magic Kingdom, an employee would intercept them. They'd ask a couple of questions about the guest's experience in the park and request permission to send them a guest satisfaction survey. Because folks love Disney, uptake on these surveys was huge—25% compared to an industry average of 2 or 3%.

THE DANGER OF FEEDBACK AS HISTORIC DATA

The survey was detailed and the data it generated was great. There was just one problem: insights lagged behind reality. Disney collected data monthly, processed it in bulk and generated reports later. Survey data from September would only reach Executives at the end of October.

The first question forms the core of an NPS model. Guests answered on a scale of 0 (not likely at all) to 10 (extremely likely). A customer's answer dictated how the model categorized them:

Detractors (0–6)

Unhappy customers who will bad mouth the brand.

Passives (7–8)

Satisfied but unenthusiastic customers.

Promoters (9–10)

Loyal enthusiasts who will return to the theme park and bring others with them.

"It was lagging," says Dan Cockerell, former VP Magic Kingdom at Walt Disney World. "There was no action I could have taken, except using it for historical purposes. If food and beverage went down in September, we could go back and do some research."

FAST AND FRESH INSIGHTS

The 26-year Disney veteran knew the Magic Kingdom needed something better. So he introduced an additional feedback mechanism: Net Promoter Score (NPS).

NPS is a service industry standard for customer experience and business growth. Although a traditional NPS survey asks just one question, Cockerell expanded his to operate with two:

1. How likely is it that you would recommend Disney to a friend or colleague?
2. Why?

You find your Net Promoter Score by subtracting the percentage of Detractors from the percentage of Promoters, resulting in a score between positive and negative 100.

How to calculate NPS

To get your overall NPS score, subtract the percentage of detractors from the percentage of promoters.

Promoter % – Detractor % = NPS

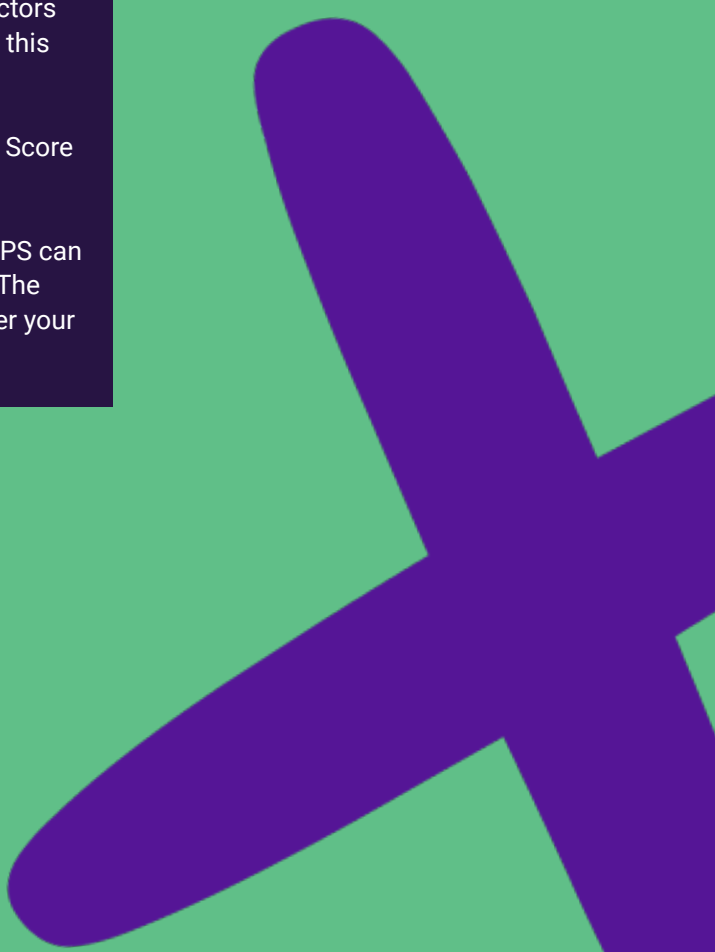
If you had 100 responses with 60 Promoters (Promoters = 60 per cent) and 20 Detractors (Detractors = 20 per cent) this formula would become:

$60 - 20 =$ A Net Promoter Score of +40

This means a business' NPS can range from -100 to +100. The higher the score, the higher your customers' loyalty.

It was a short, sharp survey that generated results near instantaneously. Gone were the month-long waits for data. Dan (Disney) could instantly see whether guests were enjoying the park.

“Feedback came in fast,” he explains. “From week to week, you could see where the Net Promoter Score was moving. It created a sense of urgency because it was in real-time.”



But the score was only half of Magic Kingdom's new survey. Spikes and troughs in score would tell them there was a problem, but not what the problem was. That's why Dan (Disney) added a second question: Why?

The qualitative followup revealed fantastic insights into Magic Kingdom's strengths and weaknesses. Dan (Disney) would save all the comments he received for particular attractions—Main Street Bakery, Jungle Cruise, Haunted Mansion and so on—and send them to managers, who would double down on the positive remarks and fix the negative ones.

"It was a process of continuous improvement," he says. "Last week your net promoter score was 40 and now it's 50. Here are all the positive nines and tens. Here are all the negative comments. Now, you can work on improving your guest's experience."

Magic Kingdom introduced NPS as a means to source immediate feedback—but there are other options available. Many organizations use Customer Satisfaction (CSAT) surveys, which operate on a single question: How would you rate your overall satisfaction with the service you received? (Answered on a scale of one to 5.) Others use Customer Effort Score (CES) or other in-house metrics.

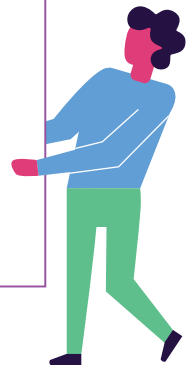
The takeaway isn't to use a specific customer experience model. It's to implement one that delivers results and insights quickly.



Top tips for collecting feedback



- ✓ Prioritize instantaneous feedback collection—or as close to real-time as possible.
- ✓ Use quantitative metrics to find problems or challenges. Use qualitative insights to learn how to fix them.
- ✓ Be prepared to act quickly. If you surface an immediate problem, challenge or opportunity, act on it immediately. Given time, complaints will fester and opportunities will fade.



Turn discordant feedback into actionable insights

Every single Starbucks store manager can pull up their register receipt tape at any moment. It gives them a real-time snapshot of revenue, transactions and daily forecasts. The report reveals whether the store is having a blockbuster day, a slump, or is somewhere in between.

“That enables the team to have a huddle and decide what, if anything, they need to do differently,” says Christine McHugh, former Vice President, Customer Service and Operations Services for Starbucks.

But choosing *what* to do isn't always easy. If total footfall is down, store managers can't force more people to come in the door. They can, however, influence how much people spend once they come in the door.

The art of frontline management isn't just collecting feedback. It's knowing how to evaluate and act on it. That all starts with categorization.



Most frontline feedback falls into one of three buckets:

#1

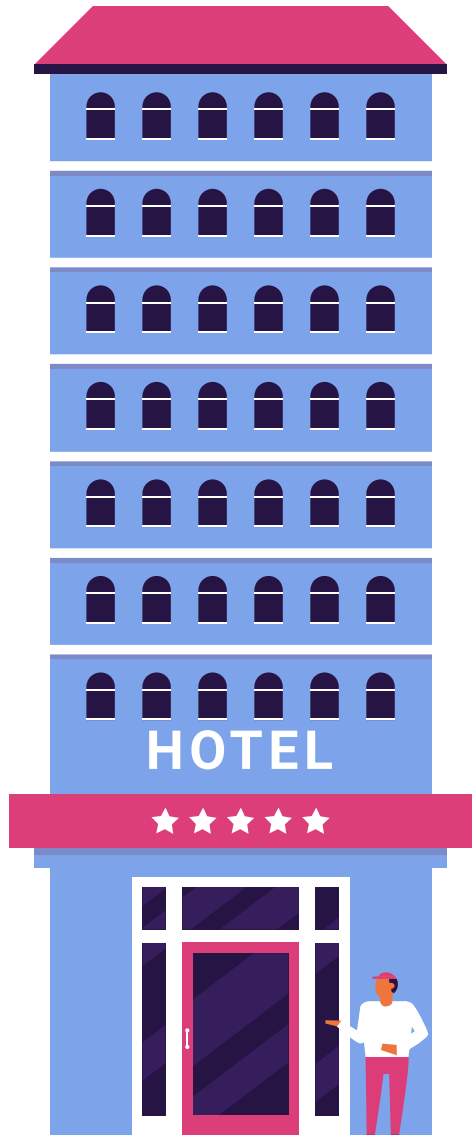
PRODUCT OR SERVICE

The first bucket covers any feedback on the *thing* (product or service) you're selling.

Say a hotel guest complains their room is too cold, that's a piece of product feedback, specifically a complaint. Here, frontline teams need to act quickly and confidently to rectify the problem and win back their customer.

At the Ritz-Carlton, this responsibility is decentralized to every single employee. After all, one of their service values reads: "I am empowered to create unique, memorable and personal experiences for our guests."

Every employee, from the hotel manager to the housekeeper, is empowered to spend up to \$2,000 per guest per day to resolve problems. Success stories from the hotel litter the internet, ranging from the small but thoughtful, to the wildly over the top.



Customer Service and Experience Expert Shep Hyken recalls finding dirty towels in his bathroom at a hotel he was staying at. He let the housekeeper know. They apologized profusely and left a short note with a candy bar to make up for the inconvenience.

“No, it wasn’t anything close to \$2,000, but it was absolutely appropriate,” he wrote on Customer Think. “The note would have been enough, but the chocolate sweetened the experience.”

On another occasion, a restaurant chef was preparing sample meals for a Russian woman’s upcoming wedding. He could tell the bride-to-be wasn’t entirely happy, despite his attempts at culinary authenticity. To up his game, he flew out to Russia to learn from the bride’s mother.

Smaller organizations likely can’t—in fact, shouldn’t—drop that sort of cash on each customer. Ritz-Carlton arrived at the \$2,000 figure by analyzing customer lifetime value—\$250,000—and worked out how much they could spend to improve guest experience and retain customers.

When equipping your frontline employees with the resources to rectify customer problems, do the same: work out how much a customer is worth to your business and how much it’s worthwhile spending to retain them.

Product feedback isn’t always exclusively negative. When Starbucks’ customers requested iced coffees back in 1993, that was product feedback, too (more about that later). While businesses can’t feasibly bend and bow to every customer’s whim, they should be watching for trends. When a sizable customer segment is asking for something—a product tweak, a new feature, personalization options, whatever—you need to report that data to your product, marketing or sales team.



#2

CUSTOMER SERVICE

The second bucket of feedback covers how your employees deliver your product or service. Think: How a waiter serves their diners or how a sales rep interacts with a buyer on the showroom floor. When it comes to customer service feedback, speed is key.

If a call center agent is being particularly abrupt, their manager needs to pull them aside at the next possible opportunity.

“

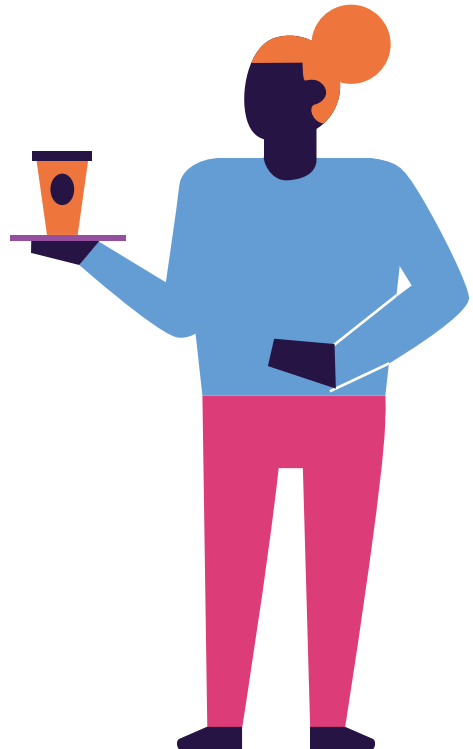
If you wait two weeks to tell an employee, it's a moot point. They're not even going to remember what happened. Tell me now, so that I can do it better next time. You can really improve your customer experience by giving employee feedback in the moment.

“

Christine (Starbucks)

But customer service feedback should come from managers and peers, too.

Recently, Christine (Starbucks) experienced great service at her local coffee shop: The barista, Sarah, delivered her coffee directly to her, rather than waiting for the former Starbucks exec to come over to the counter. It was a prime opportunity for feedback from a manager or supervisor. Importantly, it had to happen in the moment.



“

Giving employees frequent positive feedback in the moment is so motivating. If the manager said, *'Gosh, Sarah. I saw you anticipated Christine's needs. That's so nice of you,'* guess what? Sarah is going to do that again. But if you never told her, Sarah would never know she was doing the right thing to do.

Christine (Starbucks)

”

#3

SALES AND MARKETING



The final category of feedback covers sales and marketing. Although frontline staff rarely have much input into an organization's go-to-market strategy, they bear the brunt of the public's reaction to it.

Unreliable marketing promises, deals with lots of fine print, aggressive sales strategies—the fallout of everything lands squarely on your frontline employees. Aside from diffusing tense situations, resolving any immediate issues and making good on experiences, frontline teams have an obligation to collect this data and report it upward—to sales marketing, and product leaders.

Without that feedback loop, go-to-market teams are operating in the dark. They don't know what's working and what's falling flat.



Top tips for analyzing feedback

- 
- ✓ Create buckets of feedback for easy analysis. Product/service, customer service and sales/marketing are popular options but you may need to tweak categorization to fit your operations.
 - ✓ Create reporting processes for each bucket to get each piece of feedback to the most suitable person. Frontline workers need to hear about their own service performance. Product managers need access to the voice of the customer for future development and refinement. And so on.
 - ✓ Make feedback transparent and accessible. Everyone can learn from your customers—but only if they have access to their conversations.
- 



Give your employees the best chance to succeed

It's impossible to improve your performance without instant feedback. Think about an American football team. During the game, coaches will give players hundreds of pieces of feedback: You're a bit slow here. Your pass defense could be better there. You need to put more pressure on their star receiver. Each piece of feedback provides an opportunity for adaptation or improvement.

For frontline staff, it's exactly the same.





At the end of each day, frontline workers should be able to answer the question, "Was I awesome today?" When companies have a systematic approach to collecting, analyzing and delivering feedback, employees can answer this question confidently. When they clock out, they can know for sure that they're making a difference.

Des Traynor, Co-Founder of Intercom puts it like this: "Customer feedback is like business oxygen."



Make it happen

Give your frontline employees the best chance to win by providing them with clear and instant feedback from customers. Building great feedback structures and processes takes time. **Here is a quick checklist to get you started:**

STEP	PROGRESS
 Find a customer feedback, experience, or satisfaction survey that works for your organization.	Complete <input data-bbox="831 539 885 595" type="checkbox"/>
 Ask for feedback as soon as possible after every moment of truth.	Complete <input data-bbox="831 690 885 746" type="checkbox"/>
 Collect, segment, and analyze your frontline feedback.	Complete <input data-bbox="831 841 885 897" type="checkbox"/>
 Deliver feedback to its intended recipient – frontline worker, marketing, sales, and so on – as quickly as possible.	Complete <input data-bbox="831 999 885 1055" type="checkbox"/>

CHAPTER IV

RECOGNIZE ACHIEVEMENT



Recognize achievements

WHAT'S INSIDE?

Once your frontline teams understand your service promise, you need to reward the people exemplifying it. The core principle here is catching people doing things right. Learn how to ritualize recognition, implement spontaneous reinforcement and pair recognition with appreciation.

No one was expecting Joe Thornton, former Director for Blockbuster Video, when he burst through the doors of a local retail store, clutching balloons and a boombox. He was there for Prize Patrol—the company’s monthly celebration of great frontline service.

But let’s rewind and talk about how he got there.

This was earlier in his career, long before he joined HMSHost, when he was working for a national retail chain. Every time a store recorded a perfect score on their mystery shopper questionnaire, Joe (Blockbuster Video) would drop their name into a bowl. Every month, he’d pull out three names for Prize Patrol. Joe would jump on a plane, along with his fellow execs, and fly to each store for a surprise celebration.

“We would walk in with music and balloons and just celebrate with the store for their accomplishment,” says Joe (Blockbuster Video). “We weren’t visiting for any financial reasons. We prioritized service above all else.”

Even now, years later, he can recall the looks of shock and surprise on their faces. The smiles and laughter, too. With every Prize Patrol party, people grew more engaged and energetic. They worked harder and delivered better service.

The reason is simple: **Recognition is one of the most powerful motivators out there.**



Mike Byam, Author of the book *The WOW! Workplace*: “Recognize and affirm people when they contribute to the mission you share. Do this, and you will ignite their purpose and potential.”

The science backs up Blockbuster Video’s experience. **People are motivated far more by positive reinforcement than negative punishment. After all, why do you think kindergarten teachers hand out gold stars and stickers?**

In the workplace, employees who feel recognized are more engaged. When managers recognize their employees, absenteeism drops and retention spikes. Ultimately, organizations that recognize their employees perform better. According to Gallup, top performers report 23% higher profitability and 18% higher productivity than recognition laggards.

Admittedly, recognizing achievement is harder than it seems. **All businesses practice recognition to some degree, but it’s the organizations that prioritize daily recognition that truly excel.**

What you will learn...

In this chapter, we’ll explore how one frontline leader ritualized his company’s recognition processes.

We’ll reveal why making recognition public delivers outsized impact and how to weave spontaneous recognition into your culture.

Finally, we’ll meet recognition’s lesser-known but equally important partner—appreciation.



Ritualize recognition and customer feedback

Half-baked birthday celebrations and half-hearted work anniversaries. Generic thanks for a “job well done” and team-wide emails for completed projects. Most people have experienced poor employee recognition. Instead of leaving them feeling appreciated and valued, ineffectual recognition elicits little more than a roll of the eyes.

But as we saw earlier, good feedback is powerful. So how do you go from cringe-worthy congratulations to heartfelt recognition?

IT ALL STARTS WITH RITUALS.

At Sun Country Airlines, employees receive recognition on several different schedules. It starts with the day-to-day. The customer service org has an internal tool for recognition—a sort of social network for workplace accomplishments. It automatically collects customer compliments, allowing managers to tag the relevant frontline agent.

“Everybody can see their achievement via the app,” explains Jeremy Hyde, Director Of Customer Service at the airline. “Leaders and coworkers will comment, ‘Wow, that’s so amazing’ or ‘You’re awesome.’ In a virtual environment, you can still create social recognition.”



Here, speed of recognition is key. Memories fade over time. People inevitably forget interactions. Is a frontline worker going to remember how they interacted with one customer two weeks ago? Probably not. Creating a fast feedback loop allowed Jeremy (Sun Country Airlines) to recognize achievements in the moment, while they were still fresh in his employees' minds.

This layer of day-to-day feedback was just the start.

He also writes a weekly review email, covering industry trends, team performance and company updates. He includes shout-outs for top-performers, the folks with 'perfect fives' on their customer surveys.

To cultivate more buy-in, he also adds rewards. Every couple of months, he'll run an incentive or giveaway for employees. Sometimes it's cash. Other times, it's an Amazon gift card, a smart speaker or even a trip away.

The processes and structures Jeremy (Sun Country Airlines) put in place sound like a lot of work. Although they do require time, effort and care, he's confident that it's worth the investment. The moments of recognition he uncovers are authentic and genuine. They're about as far away from a generic birthday celebration as it's possible to be. When you get that right, the pay-off is huge.



“

Recognition helps people feel more connected to the organization. It makes them feel like they matter. They're coming in each day and doing a tough job that oftentimes feels thankless. We're showing that it's not thankless. We do see them. We do see their accomplishments.

“

Jeremy (Sun Country Airlines)

PERFORM A RECOGNITION AUDIT

Before you follow his lead and deploy multiple levels of recognition, it's worth auditing where your processes and policies are at today. Trawl through your performance management policies—your one-on-one templates, yearly review guides, and management training—looking for instances of recognition. Pull everything together in a standalone document to create your new recognition foundation.

Once you know what you're already doing, you can start to carefully add in more recognition rituals.

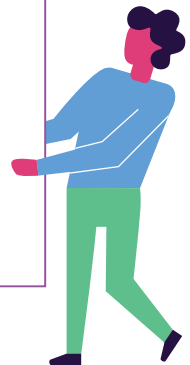
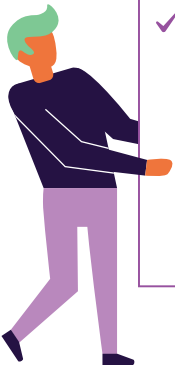




Top tips for repeatable recognition



- ✓ Audit your existing performance management processes for recognition elements.
- ✓ Don't wait for annual performance reviews to give recognition. Design feedback mechanisms on a mix of different schedules: daily, weekly, monthly, quarterly and yearly.
- ✓ Prioritize positive recognition and feedback, reinforcing frontline workers' strengths.
- ✓ Pick the low-hanging fruit like employee compliments but look higher, too. Encourage colleagues to praise their peers and managers to highlight potentially overlooked achievements.



Praise high achievers—publicly

When most people think of employee recognition, their mind goes to something like an ‘Employee of the Month’ award. A small plaque with their person’s name. Maybe a certificate. Perhaps a gift card or prize.

Dan Cockerell, former Vice President, Magic Kingdom for Disney, found the tried and tested ritual lacking.

“We had the program for three months. People forgot about it or didn’t have time to go through the process. We don’t do it anymore,” he says.

Instead, Magic Kingdom invests in grander, more ambitious public recognition programs like its yearly Legacy Award. The prize “recognizes Cast Members who go above and beyond to dream, create and inspire others.” It’s exclusive, too. Just one percent of Disney’s cast population wins it every year.

Applicants are nominated by their peers. There’s a detailed application form, covering how employees excelled across Disney’s three values: Dream, Create and Inspire. Nominations roll up from teams to departments to theme parks. Eventually, General Managers whittle down the pool to the cream of the crop.

Disney invites the winners to a big banquet. It’s a star-studded party with fantastic food, music and laughter. To permanently mark their achievement, Legacy Award winners receive a special blue name tag complete with “...a dose of pixie dust with EArIdescent accents and holographic gold foil.”



It’s the highest honor a cast member can receive. It’s the ultimate achievement, something to constantly strive towards. It’s also not the only recognition Magic Kingdom gives its members—far from it.

Magic Kingdom is packed full of structured recognition rituals. Alongside the Legacy Award, there are hundreds of different honors, such as The Disney Heroes Award, which is given to employees who literally save a life.

Structured recognition is only half the story, however. Sometimes, recognition can’t wait.

That’s where *spontaneous* recognition comes in.





Top tips for praising high-achievers



- ✓ Create aspirational recognition awards so frontline employees always have a goal to strive toward.
- ✓ Make the criteria, selection, and celebration transparent to multiply the impact across your organization.
- ✓ Design multiple recognition programs to cover your entire organization.



Spontaneous reinforcement

What's the point of recognizing an employee's performance? Perhaps to make the employee feel better. Maybe to demonstrate how valued they are. Possibly to motivate them to work harder.

Those three reasons are all true, but they miss the foundational point.

"They're side effects," says Dan (Disney). "The reason we recognize employees is to reinforce behavior. That's what recognition does."

The power of recognition

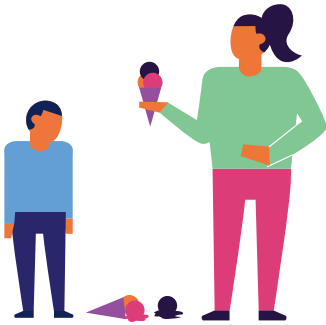
Cindy Ventrice, Employee loyalty specialist, and author of many books: "In behavioral economic terms, when we offer recognition we are acknowledging that the recipients have met a social ideal. They are behaving in a certain manner because they believe it is the right thing to do.

If we then recognize that behavior with praise or appreciation, we offer a confirmation that their behavior is desirable, and do so in a manner that recipients find meaningful."

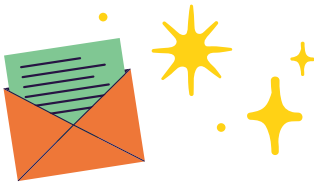


NO STRINGS ATTACHED

Magic Kingdom has a program called No Strings Attached. It gives employees free rein to spend up to \$50 on guests to create moments of delight. A couple of years ago, a kid dropped their ice cream. A cast member stepped in, offering to buy the distraught child a brand new one.



Their mom later wrote a letter to the theme park, calling the interaction the “highlight of their vacation.”



Dan (Disney) saw that as a prime opportunity for spontaneous recognition. He added a personal note to the letter and sent it directly to the employee. It was a small gesture—but an impactful one. It was like saying, “This is a behavior we value. You did an amazing job.”

This sort of recognition is prized at Disney, so much so that Dan (Disney) even set managers quotas for recognition. He kept to those standards himself, setting daily recognition reminders on his calendar: “Who helped me today? Who did I recognize today?”

To make it easy, he created collateral like personal thank you cards and kept them on his desk. When he saw a cast member doing something great, he could grab a card, write a note and recognize them in the moment. It reduced the friction and biased him toward action. This way, no small action escaped his attention.

On one occasion, he saw an ice cream seller standing out in front of their cart. They were in the crowd and approachable. Whenever someone asked to buy a cone or a tub, they’d hop back and serve them. As soon as the transaction was done, they’d jump out front again.

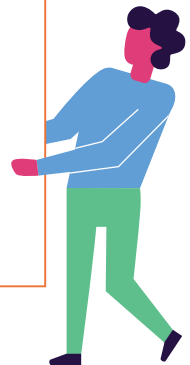
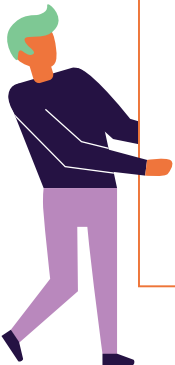
“I valued that behavior,” he says. “I looked for very particular behaviors and how people were doing things. Like someone greeting every guest as they walked by. That’s fantastic. I know how tiring it is to do that, but it makes all the difference in the world. I’m recognizing them, in the moment, by sending them a card.”



Top tips for in-the-moment recognition



- ✓ Set recognition goals for managers and report on their performance.
- ✓ Deliver recognition as soon as possible after an employee exhibits a positive behavior.
- ✓ Get granular and make your recognition as specific to the person and their accomplishment as possible.



Compliment recognition with appreciation

“Thanks for coming in today, Ryan.”

The first time Ryan Minton, Area General Manager for TPG Hotels and Resorts, heard that sentence, it was from a front desk employee, one of Ryan’s direct reports.

“I was a front desk manager and Jason was a hospitality student,” says Ryan (TPG Hotels and Resorts). “It was funny because I was his manager. I should have been the one thanking him for coming in.”

But the power dynamic didn’t phase the young employee. He was a ball of energy who loved his job. Every morning, he’d search for Ryan, shake his hand, and thank him for coming in today. He’d do it day after day, month after month. When Jason graduated from college, Ryan (TPG Hotels and Resorts) hired him full-time.

Not long after his recruitment, Jason was tragically killed in a car accident. It was devastating to Ryan, his colleagues, and the hotel. It felt like there was a huge absence in their lives. Ryan recalls thinking about how much he missed Jason’s energy, his morning handshakes, and his daily thanks.

Why did it resonate so much?

The answer is simple: Jason’s comments made him feel like he mattered. They made him feel that he was important. “I wanted other people to feel that way,” he said. “I started this tradition of carrying on the tradition for Jason: Thanking people for coming in every day.”

Recognition of someone’s work is undeniably important, but Jason and Ryan (TPG Hotels and Resorts) discovered something else: appreciation.

“Recognition is about giving credit for something good,” explains Dr. Orin Davis, self-actualization engineer and positive psychology expert. “Appreciation is about expressing gratitude for something good.”



APPRECIATION VS RECOGNITION

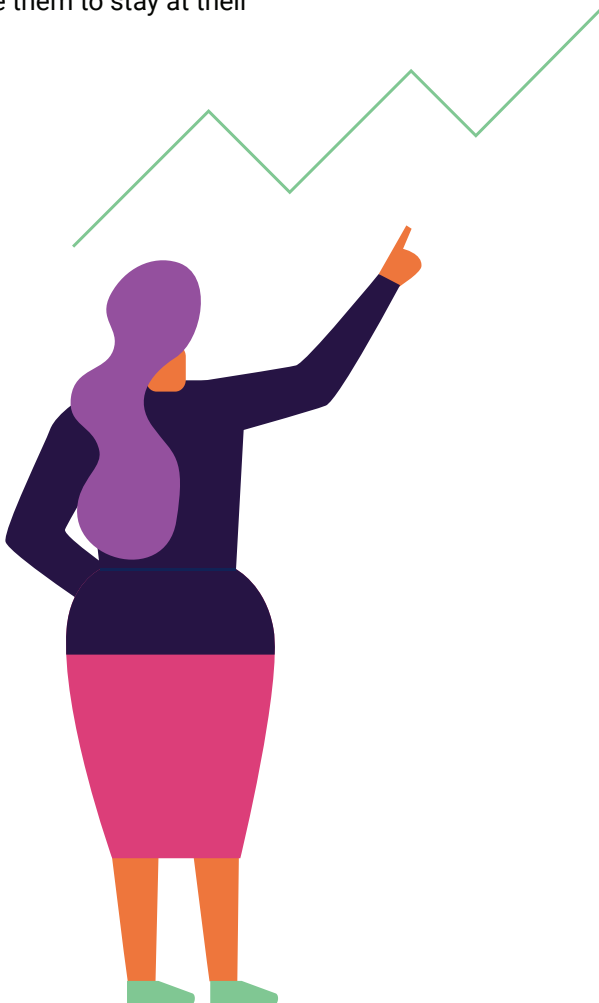
Winning an employee of the month award or five-year service award is recognition. Thanking someone for their contributions and personal qualities is appreciation. Unlike recognition, which has to be tied to achievement, appreciation can be unlimited.

Again, cultures of appreciation are strongly tied to improved employee experience and performance. Workers reported that more appreciation would encourage them to stay at their company longer.

Research from Harvard Medical School links appreciation to improvements in employee health, stress and absenteeism.

Find someone doing something positive and say, "Thank you for your work. You're awesome. We couldn't possibly do this without you."


The impact will blow you away.





Top tips for showing appreciation



- 
- ✓ Tailor your appreciation to the individual. Do they prefer public or private praise? Are you focused on developing a strength or repairing a weakness?
 - ✓ Build rituals like peer-to-peer shoutouts and dedicated appreciation blocks in employee reviews.
 - ✓ Be generous with your praise. Even if a frontline interaction results in a negative outcome, you can still thank an employee for their dedication, care and effort.



Gold stars are for everyone

Think back to your days in preschool or kindergarten. Specifically, think about a time when your teacher left a gold star or sticker on your work.

How did you feel?

Pretty good, right?

Recognition tickles your hypothalamus, increasing dopamine production in your brain. That's the happiness hormone. With such a strong biological link, it's no wonder that recognition is such a strong motivator.

Despite this, many companies have relegated recognition to a 'nice to have'. It's something they break out for big occasions—retirement parties, end-of-year celebrations, big contract wins. These are good, but they aren't enough on their own.





Regular, ritualized recognition is an organizational superpower. Raising up your top performers gives everyone something to aspire to. Spontaneous recognition turns moments of praise into an underlying culture of recognition. And introducing appreciation empowers managers to show gratitude even when times are tough.



Make it happen

Recognition is not just a tool for kindergarten teachers. It's a potent motivational tool for all frontline managers. What's more, you can get started today—for free.

Here's a quick checklist to start building your culture of recognition today.

STEP	PROGRESS
 Implement some small, daily recognition rituals like shout outs and huddle wins.	Complete <input data-bbox="831 604 882 661" type="checkbox"/>
 Celebrate larger achievements during weekly meetings or communications.	Complete <input data-bbox="831 756 882 814" type="checkbox"/>
 Inspire frontline workers with long-term quarterly or yearly celebrations.	Complete <input data-bbox="831 909 882 966" type="checkbox"/>
 Train your managers to deliver spontaneous reinforcement when they catch frontliner works performing well.	Complete <input data-bbox="831 1065 882 1123" type="checkbox"/>

CHAPTER V

COACH FOR SMALL IMPROVEMENTS



Coach for small improvements

WHAT'S INSIDE?

Don't underestimate the power of small improvements. If someone ups their game one percent a day, they'll end the year 37 times better than they started. Learn how to build impactful coaching routines, tailor your teaching to individual preferences and cultivate a culture of continuous improvement.

The 1969 New York "Miracle" Mets shocked the world by beating, not just the Atlanta Braves, but also the highly-favored Baltimore Orioles.

Leicester City overcame 5000-1 odds to win the coveted Premier League trophy in 2016. Average Joe's Gymnasium conquered the 2004 Las Vegas International Dodgeball Open Championships. History is full of sporting miracles. They all have one thing in common: coaching.

All great sporting teams have a strong coaching culture. They focus on one thing every day, driving small, iterative improvements. Luckily, small gains don't stay small for long. They compound into significant strengths and monumental wins.

But coaching isn't just for muddy sports fields and sweaty gyms.

Bill Gates, *Co-founder of Microsoft*, believes "Everyone needs a coach. It doesn't matter whether you're a basketball player, a tennis player, a gymnast, or a bridge player."

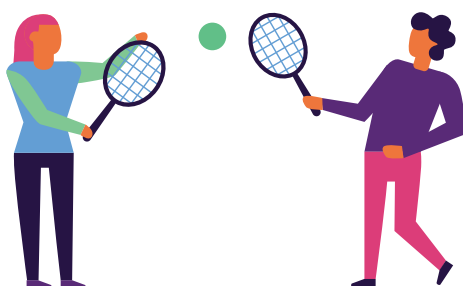
THE CASE FOR COACHING

Four in five employees who receive coaching report increased self-confidence. Over 70% benefit from improved work performance, relationships, and communication skills.

But how many frontline workers actually receive regular coaching? Just 40% of workers say they receive training once a year. What about daily coaching? The proportion is vanishingly small.

Just think about that.

The largest class of workers on the planet receive little or no regular coaching.



WHAT IS WORKPLACE COACHING?

According to the Chartered Institute of Personnel and Development, “Coaching aims to produce optimal performance and improvement at work. It focuses on specific skills and goals, although it may also have an impact on an individual’s personal attributes such as social interaction or confidence. The process typically lasts for a defined period of time or forms the basis of an on-going management style.”

While winning a World Series title is pretty tricky, implementing coaching in your frontline teams isn’t.

What you will learn...

In this chapter, we’ll investigate how to lay a solid coaching foundation by translating ambitious service standards into bite-sized coaching chunks.

We’ll learn how to weave coaching into a long-term learning and development framework. We’ll unpack learning styles and discuss how to check whether frontline workers are taking coaching onboard.

Finally, we’ll touch on culture, specifically how to cultivate a culture where people *want* to learn and grow.



Set your coaching foundations

Marcus Buckingham, business researcher and author of *Nine Lies About Work*, once described the difference between good and bad management as the difference between checkers and chess. Mediocre managers treat their direct reports as checkers with uniform strengths, weaknesses, and skill sets. Meanwhile, great managers play chess.

“In chess, each type of piece moves in a different way, and you can’t play if you don’t know how each piece moves,” wrote Buckingham in *Harvard Business Review*.

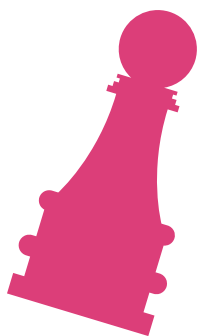
That’s the essence of great personalized coaching. You’re not trying to help a team or business unit improve. It’s all about the individual.

BUT HOW DOES IT WORK IN PRACTICE?

It starts with your service standard. Think back to the fine print from New Seasons Market (chapter 1).

To deliver impactful coaching, you want something that contributes to your service standard and is specific and relevant to the individual worker. A great way to lock in those two elements is via customer feedback.

In other words, what topics do a frontline worker’s customers most commonly reference when providing constructive feedback?



Perhaps a worker only ever gives shoppers directions to products, rather than personally guiding them to the aisle. That's a perfect opportunity to deliver personalized coaching linked to the service standard.

To improve the team member's performance, there are a number of great coaching options available:



Roleplays

Play the customer and ask your frontline worker to act out leading you to the requested product. Encourage them to engage you in conversation and make the experience more personal. Roleplays are effective because they push past theory into real behavior, rendering improvement tangible.



Shadowing

Most frontline teams have a bunch of superstars. Treat these folks like the golden asset they are. Have junior or underperforming workers shadow them for first-hand experience of what great service looks like.



Tape reviews

Recorded roles like customer support agents have a huge advantage in that most of their customer interactions are documented. Normalize reviewing tape and looking for ways to improve.

In simple examples like this, it's easy to pick a focus for coaching. But the real world is messy and complicated. Faced with competing priorities, it can be tricky to know what to select.

James Clear, continuous improvement expert and author of *Atomic Habits*, has some great advice.

FIRST, DO MORE OF WHAT ALREADY WORKS.

New initiatives feel exciting, but that doesn't make them better than existing ones. If you're running a coaching program that's already delivering results, double down on it. Increase your coaching frequency. Make it a daily routine, if that's possible. Deliver coaching to all your employees, not just new starts and underperformers.

"Progress often hides behind boring solutions and underused insights," James wrote on his blog. "You don't need more information. You don't need a better strategy. You just need to do more of what already works."

SECOND, AVOID TINY LOSSES.

Helping frontline workers isn't just about adding new skills and competencies. If you fix mistakes and errors, that's hugely impactful, too. It's a concept called improvement by subtraction: cutting mistakes, simplifying complexity, and reducing inefficiencies.

THIRD, MEASURE BACKWARD.

Continuous improvement typically works by setting a forward-looking goal and working toward it. Clear recommends the opposite: "Make decisions based on what has already happened, not on what you want to happen."


If you follow this advice, you'll have a solid foundation for your coaching.

But driving your coaching to the next level means complementing day-to-day coaching with a higher level view of learning and development.





Top tips for firm coaching foundations

- 
- ✓ Commit to daily personalized coaching conversations with frontline workers.
 - ✓ Use your service standard and customer feedback to home in on areas for individual improvement.
 - ✓ Leverage technology to scale your coaching delivery. If you have hundreds or thousands of frontline workers, it's going to be impossible to deliver personalized conversations to them all. Tap coaching software to do a lot of the heavy lifting.
 - ✓ Follow best practice: double down on what's already working; drive improvement by subtraction; and measure backward.



Create development tracks for frontline workers

Coaching isn't a 'one and done' sort of thing.

Building mastery in any frontline skill—customer communication, problem-solving, complaint handling, and so on—takes time. After all, very few people are born as a problem-solving savant or complaint handling wonderkid. Honestly, it's unreasonable to expect employees to be superstars from day one.

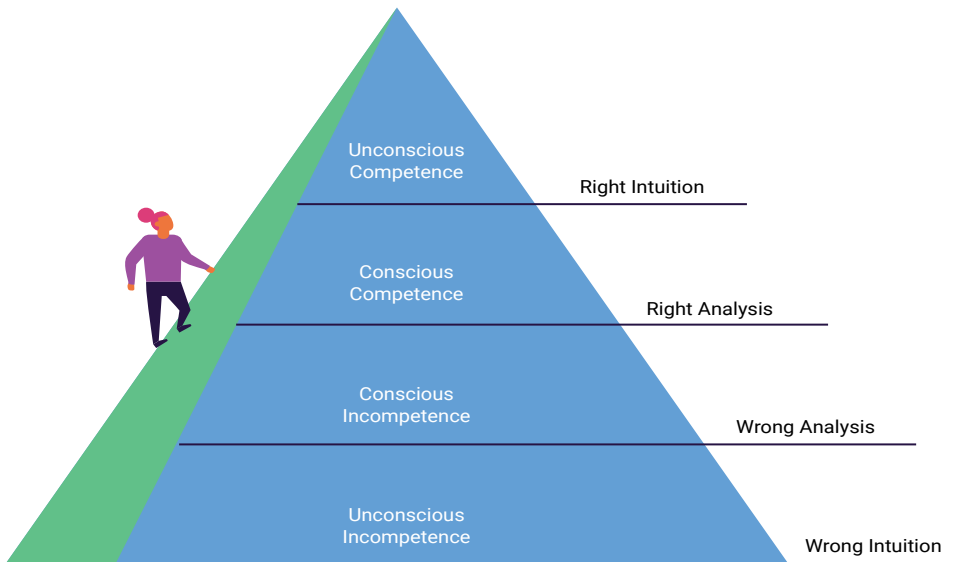
In practice, mastery takes multiple coaching touches, repeated practice sessions, and consistent reinforcement.

"It's like climbing up a pyramid," says Anna Egan, Manager, Customer Experience and Business Development for A1 Air Conditioning and Heating.

That pyramid is otherwise known as the four stages of competence, a learning model invented by management trainer Martin Broadwell back in the 1960s.

It breaks down learning into four stages, each a subtle improvement on the one that came before it. A good coaching plan doesn't try to leap from stage one to stage four in one session. Instead, it asks, "How can we take a frontline worker from stage one to stage two?"

To see how a frontline worker climbs the ladder, consider complaint handling. It's a valuable skill for any frontline worker, but one all people have to learn from scratch.



Stage 1

UNCONSCIOUS INCOMPETENCE

- They're not aware of the skill.
- They're not aware they have a skill deficit.

"When you're a beginner, you don't know what you don't know," explains Anna (A1 Air Conditioning and Heating). A brand new contact center worker probably won't be able to handle a complaint because they don't know about the skill. They're not even aware of their skill deficit. Worse, sometimes they might even disregard the skill as irrelevant.

The goal of stage one coaching isn't to develop skills or refine techniques. Your sole objective is to cultivate buy-in and engagement around complaint handling. To break out of stage one, frontline workers must understand the value of the skill you're trying to teach.

Pull everything back to their role, experience and progression. How will learning to handle complaints make their life easier? Will it lead to more promotion opportunities? Can it help them work more efficiently?

Don't just rely on abstract stories, either. Bring in senior colleagues and peers who have attained mastery of the skill. Have them prove how it's valuable and helpful.



Stage 2

CONSCIOUS INCOMPETENCE

- They're aware of the skill.
- They're aware they have a skill deficit.

The first stage of learning shines a spotlight on skill deficits. Suddenly frontline workers realize where their weaknesses lie and—perhaps more importantly—how they can address them. In the second stage, coaching turns to doing.

“When you’ve been training, you know what you know,” says Anna (A1 Air Conditioning and Heating).

In the second stage, leaders demonstrate complaint handling techniques and frameworks, providing opportunities for workers to practice them in safe environments. That last bit is important. Think about the high-stakes nature of complaint handling. You don’t want to throw people into calls with unhappy customers and hope they fumble their way through.

Roleplaying is particularly effective. It puts frontline workers into a close recreation of real life *without* the negative consequences of getting it wrong. They can practice on real humans and receive real feedback.

Combine roleplays with other tactics like shadowing sessions and micro-skill practices. These let you hone in on specific skills or strategies, rather than engaging in an end-to-end conversation.

Through the second stage, have your employees set short-term goals. Next week, they want to know the complaint handling process inside out. Next month, they want to have mastered several strategies for defusing angry customers. Next quarter, they aim to tackle live calls. You get the idea.

As a leader, acknowledge that progress may be slow, especially if they’re tackling a new skill. Take time to celebrate wins and successes to maintain momentum and engagement.



Stage 3

CONSCIOUS COMPETENCE

- **They're aware of the skill.**
- **They can perform the skill without assistance.**

During the third stage, workers develop a conscious competence of a skill. They may be able to competently handle a complaint—but they have to think about the process. Are they defusing the situation? Are they recording the complaint? Are they analyzing it? Are they devising resolutions? Are they communicating and following up? Are they escalating the call to a manager if they can't solve the problem?

Most frontline workers live in the third stage. The most effective way to move from stage three to four is practice, review and feedback.

If you're dealing with recorded roles, run group reviews and one-on-one analyses. If you're focusing on complaint handling, queue up a couple of calls, listen to the conversation, and discuss the agent's strengths and weaknesses. Did they ask the best questions to understand the customer's position? Did they make the customer feel heard and understood? Were there unexplored solutions? Was the call properly documented?

Drill down on the specifics. Your goal is for frontline workers to be able to perform without thinking. They need to be able to handle objections as easily as walking down the street.



Stage 4

UNCONSCIOUS COMPETENCE

- They're aware of the skill.
- They can perform the skill without thinking.

To understand the difference between the third and fourth stages, think about learning to drive a car. When you're starting out, you can drive—but you have to think about the process. Select drive, check your mirrors, release the handbrake and go. You have to concentrate and think about each step in the process.

With unconscious competence, you're doing the same thing without thinking about it. You're on autopilot. You get in your car and drive.

It's the same thing for frontline skills. A good contact center agent will handle a complaint with care, empathy, and diligence, moving through the process step by step. On the other hand, a great agent will address the customer complaint without thinking. It'll feel like a natural conversation.

Imagine a customer calling into a cable company to complain about an outage.

As soon as an unconsciously competent agent picks up the call, they're listening and taking notes: It's a caller from Brooklyn, their TV went out, then their broadband failed, and it's been that way for 12 hours.

Immediately, the agent apologizes and promises to help. While they're asking followup questions, they message a technical colleague to check uptime.

Waiting on the response, they fill the dead air with a couple of empathetic questions: Is the outage affecting your work? Were you waiting long to get through?

As soon as the response comes back—"routine maintenance ending in 45 minutes"—they report back to the customer, assuring them their service will return within the hour. The agent apologizes again for the outage and promises to follow up to ensure the service has returned.

The whole process is automatic. They're not thinking about each step. It's flowing like a natural conversation. They've achieved unconscious competence.

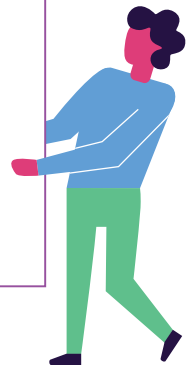
Once someone hits this level, it's important not to let them stagnate, says Anna (A1 Air Conditioning and Heating). Find new ways for them to hone their craft like mentoring or peer-to-peer coaching. Also, remember that few skills remain static over time. Schedule regular reviews to ensure they're staying at the top of their game.



Top tips for creating impactful coaching



- ✓ Make coaching plans clear and transparent. People thrive when they have a goal or objective to aim for.
- ✓ Vary your coaching sessions, rather than focusing on individual skills or themes for extended periods of time. It's easy to burn out so keep sessions varied.
- ✓ Punctuate regular coaching sessions with daily feedback sessions. Course correct early to keep people on track.



Learn about everyone's individual learning style

Early in her career, Anna (A1 Air Conditioning and Heating), received a task that she dreaded: termination. There was a worker with a mixed performance review. She was great on the phones—friendly, confident, and outgoing. While most customers loved her, she also made a lot of mistakes. Ultimately, it reached a point where the company couldn't keep her on.

During a conversation with the worker however, Anna (A1 Air Conditioning and Heating) realized something her colleagues had previously missed.

“She had a learning disability,” she explains. “She needed different tools than the rest of the team members. Instead of *telling* her what she needs to do, you had to write it down or create a drawing for her.”

Switching from verbal to written instructions was a tiny change—but it had a huge impact. Suddenly, the worker began responding to coaching and feedback. Her performance improved and her mistakes disappeared. Eventually, she became one of the top performers in the company, winning the President's Award for excellent staff members.

It reinforced an idea that Anna (A1 Air Conditioning and Heating) had long held: **people require personalized coaching. While a one-size-fits-all approach is simpler to set up, it's not impactful.**

Understanding learning styles is actually pretty easy. There's a lot of research into different archetypes and quizzes to help identify preferences. Two of the most popular frameworks are Kolb's Learning Style Inventory (converger, diverger, assimilator, accommodator) and Fleming's VARK (visual, auditory, reading/written, and kinesthetic).

Once you know someone's learning style, you can tailor your coaching toward it.



Learning style is only one piece of A1 Air Conditioning and Heating's person-centric coaching process. "I focus on three different things: career, education, and personal lives," says Anna (A1 Air Conditioning and Heating).

For example, the call center agent she saved from termination also harbored ambitious goals. She wanted to start her own catering business. Anna (A1 Air Conditioning and Heating) built her development plan around that goal, targeting skills that could help in her current frontline role and as a small business owner.



Another employee, a 65-year-old man revealed that he wasn't interested in progression opportunities. He liked his current role as it afforded him flexibility, security and purpose. Instead of pushing him toward a promotion, she encouraged him to tackle other responsibilities like peer mentoring and training.

Tailoring your coaching to individual learning preferences will increase knowledge retention, but aligning your coaching with individual ambitions will secure engagement and buy-in.





Top tips for personalized plans

- 
- ✓ Use quizzes and questionnaires to discover how people like to learn. (Or simply ask them!) Tailor your coaching to their preferred learning style and check in regularly to find out if it's landing.
 - ✓ Broaden your coaching to include wider career and life goals. You'll get the most buy-in and engagement when frontline workers believe you're helping them grow as people, not just employees.
 - ✓ Remember that progress isn't linear. Everyone has different circumstances, objectives, and ambitions. Tailor your coaching plan to each individual's goals.
- 



Inspect what you expect to reinforce coaching

Ryan Minton, Area General Manager for TPG Hotels and Resorts, spends the first hour of every workday walking the corridors of the 300-room Renaissance Boca Raton. From the front office, to housekeeping and maintenance, to security, the Area General Manager puts in face time with every department.

His morning ritual has a very simple explanation: “I inspect what I expect.” In other words, when Ryan sets a service standard or delivers a coaching session, you can be sure that he’ll be checking in on its implementation later.

A couple of months ago, he got an opportunity to do just that.

During a night shift, a guest had come to the front desk with a complaint. They were in the elevator and felt it unexpectedly drop a few feet. They believed the elevator was unsafe. Faced with this complaint, the front desk worker went to the extreme. He locked down the elevator, wrapped the door in caution tape and called the repair company to come out immediately.

Although his dedication to safety was admirable, this wasn’t quite the right approach, says Ryan (TPG Hotels and Resorts).

The correct response was to simply turn the elevator off. At the Renaissance Boca Raton, that’s no big deal. They have three elevators and, due to the pandemic, reduced occupancy. There was plenty of room for everyone. As it was, the caution tape made the elevator look like a crime scene and the middle-of-the-night repair call cost a fortune.

Ryan (TPG Hotels and Resorts) isn’t the kind of leader to manage with an iron fist. Instead, he used the mistake as an opportunity to re-coach the front desk worker and provide feedback in the moment.

He explained about the elevator operations (they’re state of the art and won’t operate if they’re unsafe) and provided some alternative responses to the problem (lock the elevator and call the repair company in the morning).

He credits the coaching opportunity to his feet. By physically walking the hotel and visiting his colleagues, he forms strong personal relationships and sees the day-to-day implementation of the hotel’s service standards—the ultimate proof of whether it’s being lived.



You have to inspect what you expect. Whenever I take over a hotel, we have a big party and we blow up the service standard on a huge poster. We have music and food and everybody takes the pledge. But if that's all you do, it'll die very quickly. You have to live it.

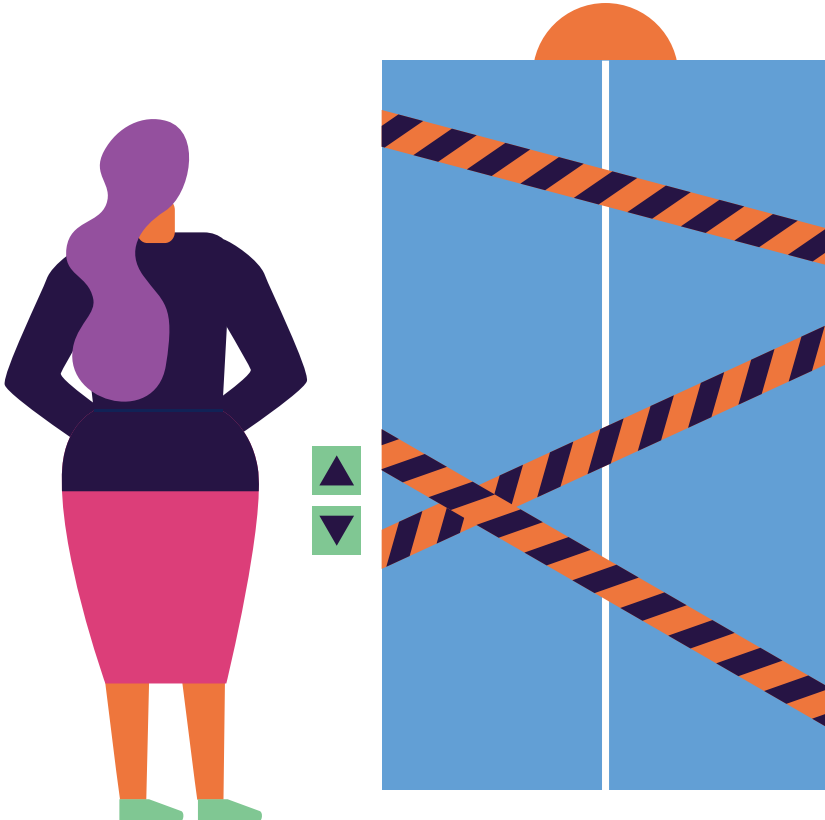
Ryan Minton

General Manager, TPG Hotels and Resorts



The elevator example is a large one, but Ryan (TPG Hotels and Resorts), says his walks are full of smaller corrections, too. For example, his hotel staff practice the 20-10 rule. If a guest is within 20 feet of an employee, they get a smile or a wave. If they come within 10 feet, they get a verbal interaction—a *hello* or *how are you doing?*

When you're deep in your work, it's easy to let these things slip. But with Ryan (TPG Hotels and Resorts) walking the hotel and experiencing the venue as a guest, he's able to surface little mistakes and run in-the-moment coaching sessions, keeping the hotel's service standards incredibly high.





Top tips for reinforcing coaching



- ✓ Inspect what you expect. Wherever possible, be present in your business. Walk your corridors and shop floors. Experience your service standard first-hand.
- ✓ Don't wait for weekly one-to-ones to praise great work. Praise high-achievers whenever you see someone truly living your service standard.
- ✓ If you see a frontline worker struggling, step in with advice and guidance. Deliver ad hoc coaching, let them practice their service delivery on you, and make a note to check back in later.



Cultivate a culture of learning and improvement

In the spring of 2020, Joe Thornton, Executive Vice President/Chief Operating Officer for HMSHost, had to get creative.

He'd was shouldering responsibility for more than 1,500 food and beverage locations in North America. Literally two days into his tenure, the pandemic forced most airports to close and put a hold on all of Thornton's planned travel.

"We went months without having field visits," he says. "That's extraordinarily long in any type of business—certainly in a *service* business."

To fill the gap left by non-existent site visits, Joe (HMSHost) began requesting short videos of each location. From his home office, he would review the tape, evaluating each location's standards and performance.

It could have felt like an executive micromanaging from on high, but at HMSHost it didn't.

"It wasn't a gotcha moment," he explains. "It was actually a *learning* moment. It worked both ways. Here in the headquarters, we didn't have visibility into what was happening in the airports. They weren't sure if they're working on the right thing. It allowed for us to have that dialogue back and forth."

Creating a culture of improvement is crucial on the frontlines. Because if employees aren't receptive or willing to change, the quality, speed, and accuracy of feedback is moot. However, cultivating a culture of coaching doesn't start with frontline employees. Change must start at the top.

"It's really easy to fall into a trap where feedback is one-directional," says Jeremy Hyde, Director Of Customer Service for Sun Country Airlines. "I'm going to tell you all the things you're doing wrong so you can be better."

This creates a dictatorial environment, rather than one where *everyone* is trying to improve. Jeremy (Sun Country Airlines) advises leaders to make the first move and solicit feedback on their own performance: What's going well? What's not going well? What should you keep doing? What should you stop doing? Ideally, two-way feedback takes place in a formalized process like a 360 Degree Feedback review. Where you don't have systems in place, informal conversations between leader and employee can work well, too.

"By doing those things, we're showing that we're going to have open communication," says Jeremy (Sun Country Airlines). "It's transparent and everybody's voice matters."

AVOIDING GOING A MILE WIDE AND AN INCH DEEP

With a foundation of good faith in place, it's tempting to launch into a period of hyperactive feedback, attempting to solve every issue at once. This is a mistake. As Joe (HMSHost) explains: "If you're trying to watch everything, you're watching nothing."

When he started visiting locations and giving feedback, Joe (HMSHost) obsessed about the details. For example, he had one member of his team spend a day documenting how many people left a restaurant's line before being served. Out of 93 passengers, 11 left before being served.

"That led us to a problem solving activity," he says. "How do we capture people at the end of the line? Is it a queuing line adjustment or someone taking orders out in the line? Or someone offering coupons to those who are walking off the end of the line?"

But he could only drive that improvement because he was laser-focused on the specifics. If he'd set his team a broader goal—improve customer experience or speed up service—it's likely that they wouldn't have discovered the particular customer drop-off issue.

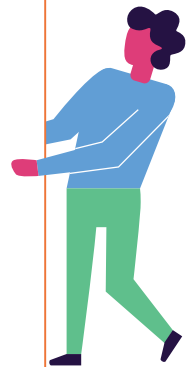




Top tips for creating a coachable culture



- ✓ Start at the top. Frontline employees want to see management practicing what they preach. Before managers start doling out criticism and advice, encourage them to ask their teams for feedback.
- ✓ Focus on specifics. No one can become a superstar frontline worker overnight, but they can improve *something*. They can make sure they greet every customer by their name or have a verbal interaction with everyone who comes within 10 feet. Each small improvement is a step towards becoming a superstar frontline worker.
- ✓ Design coaching rituals like one-on-one and peer review sessions. Although in-the-moment coaching is priceless, it can be tough to find the time unless you make coaching rituals part of your routine.



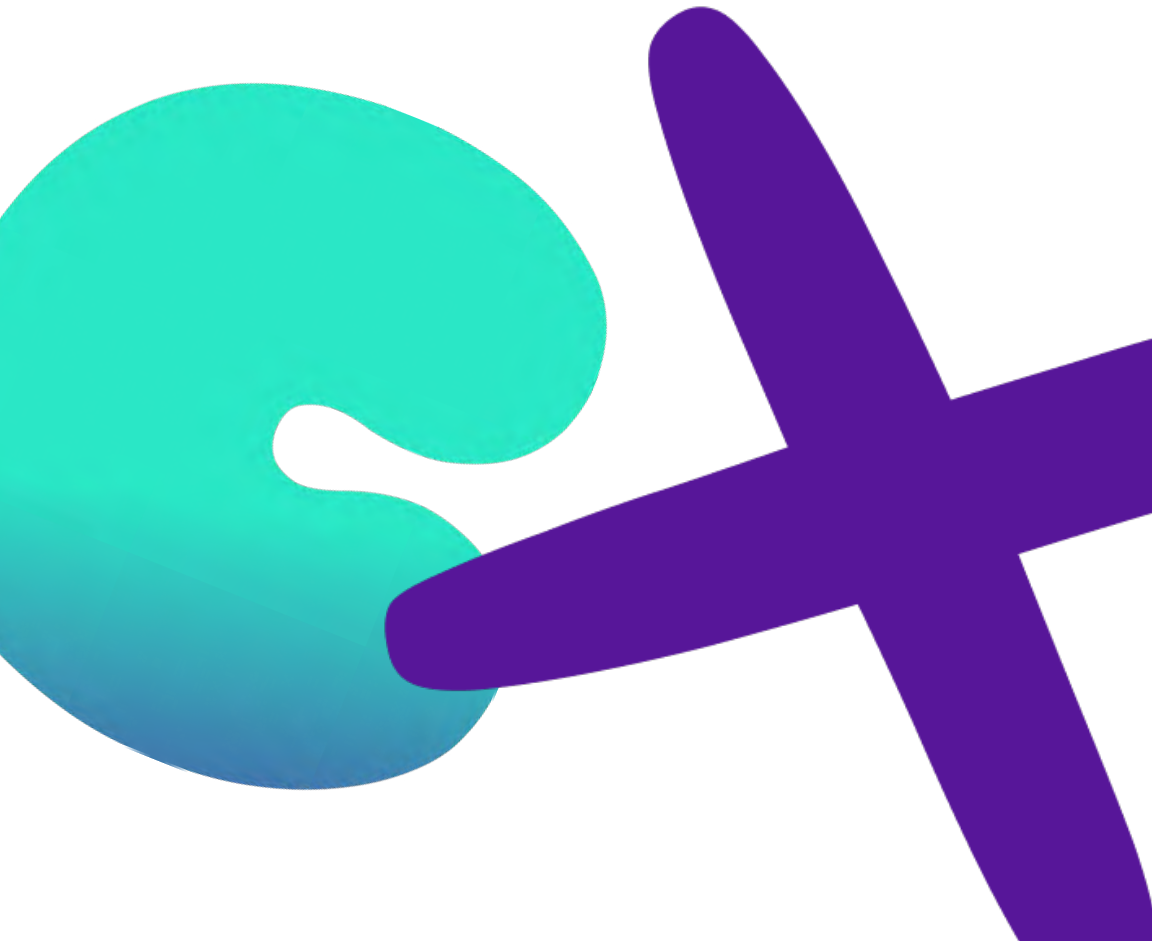
Play better than you think you can

We like to focus on sudden success: the business that burst onto the world stage; the sports star who emerged from nowhere; the employee who became a superstar overnight. Success however, is rarely instantaneous.

But as Richard Branson once said: "There are no quick wins in business. It takes years to become an overnight success."






Whether nailing a play on the football field or perfecting how you handle a customer complaint, great achievements are built on long-term dedication, learning and improvement. Companies that breed a culture of continuous improvement help their employees grow every day. When you focus on improving one thing every day, you will develop mastery.

Tom Landry, who was head coach for the Dallas Cowboys for 29 seasons, had a simple definition of coaching: "It's getting players to play better than they think they can." That holds just as true on the business frontlines as it does on the gridiron.



Make it happen

To get started on the way to coaching greatness. **Here's a quick checklist.**

STEP	PROGRESS
 Create a daily coaching ritual and personalize your sessions to individual frontline workers	Complete <input data-bbox="831 614 885 670" type="checkbox"/>
 Use customer feedback to highlight impactful coaching opportunities for each individual.	Complete <input data-bbox="831 732 885 788" type="checkbox"/>
 Use the Hierarchy of Competence to design step-by-step coaching plans to take people from novice to master.	Complete <input data-bbox="831 868 885 923" type="checkbox"/>
 Use quizzes, questionnaires, and conversations to uncover everyone's individual learning style.	Complete <input data-bbox="831 999 885 1055" type="checkbox"/>
 Implement checks to "inspect what you expect."	Complete <input data-bbox="831 1117 885 1173" type="checkbox"/>

CHAPTER VI

CONNECT THE FRONTLINE TO THE BOTTOM LINE



Connect the frontline to the bottom line

WHAT'S INSIDE?

If your frontline workers are putting in outstanding performances, your key metrics are certain to improve. Your frontline staff deserve to feel pretty chuffed about these results. Learn how to demystify corporate objectives, identify relatable goals and course correct as a team.

The COVID-19 pandemic wreaked havoc on the hospitality industry. Tourists disappeared, business travelers evaporated, and employees vanished.

“It’s been tough,” says Ryan Minton, Area General Manager for TPG Hotels and Resorts, the hotel management company behind more than 33,000 rooms across 200 prestige locations, including Hilton, Marriott and InterContinental. “Every room that we sell is literally another hour for an employee.”

It’s a huge burden to bear and it’s one Ryan (TPG Hotels and Resorts) doesn’t shoulder alone. He ensures all his employees know the stakes, connecting the dots between their service, corporate performance and their jobs. Take occupancy rates. At some hotels, it’s an abstract metric. At his hotel, however, everyone understands that full rooms mean hours, jobs and paychecks.

“If I sell 300 rooms, I can employ 20 housekeepers,” he explains. “I make sure everyone in the organization understands how the revenue impacts things like hours. When you’re transparent, you get more buy-in. People feel like they can impact the bottom line.”

When frontline workers feel connected to the success of the company, it’s like lighting a fire under them. Ryan’s sales reps, for example, are busting their tails to book rooms. They’re not working that hard just to earn a commission check. They’re chasing leads and sniffing out new business to protect their colleagues’ jobs and buoy the success of the hotel as a whole.



Unfortunately, his team is in the minority.

Only 26% of people say they understand how their individual work contributes to larger company goals.

Where TPG Hotels and Resorts' team members feel energized, empowered and motivated, it's a different story elsewhere. A lack of connection between the frontline and bottom line leaves other workers feeling unappreciated and powerless.

This lack of connection isn't merely because companies don't care. Most leaders would love frontline workers to feel ownership over bottom line metrics like revenue growth and profit margin. The problem is, it's tough to connect high-level corporate performance to day-to-day work. Most high-level objectives simply aren't relatable.

What you will learn...

In this chapter, we'll discuss practical ways to demystify corporate purpose and performance, creating strong links between frontline work and bottom line numbers.

We'll investigate the most impactful metrics to share with workers and the ideal relationship between performance and rewards.

Finally, we'll touch on how organizations can harness their whole team to course correct when things go wrong.

Demystify corporate purpose and performance

Most companies have ambitious missions.

Tesla

“To accelerate the advent of sustainable transport by bringing compelling mass market electric cars to market as soon as possible.”

Starbucks

“To inspire and nurture the human spirit – one person, one cup, and one neighborhood at a time.”

Walmart

“We save people money so they can live better.”

When you're on the frontlines, it's tricky to see how your work contributes to such lofty objectives. How does a customer service manager at Tesla accelerate sustainable transport? How does a Starbucks barista pulling an espresso shot nurture the human spirit? How does a Walmart cashier help people live better?

The best leaders recognize that jumping from the frontline to a company-wide mission is impossible. Instead, organizations use *cascading* goals and objectives.



Mission			
Strategy			
Business Unit Objectives		Business Unit Objectives	
Individual Projects/ Campaigns/ Initiatives	Individual Projects/ Campaigns/ Initiatives	Individual Projects/ Campaigns/ Initiatives	Individual Projects/ Campaigns/ Initiatives

With cascading objectives, you don't show the overarching objective to frontline workers and hope they fill in the gaps. You break the mission down into strategy and the strategy into business unit objectives and individual work. The pyramid of objectives and goals illustrates how everything slots together, each step influencing the step above and being influenced by the step below.

This strategy works best when you communicate the whole pyramid to all levels. **When frontline workers see the bigger picture, it's like puzzle pieces falling into place.**

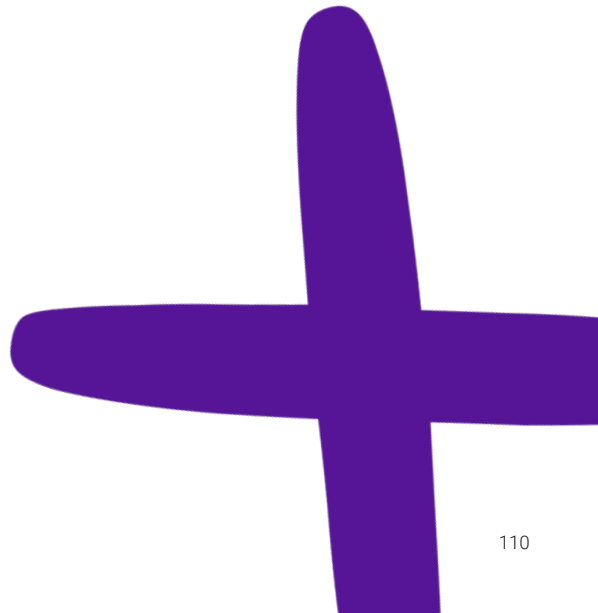
And it works for performance objectives as well as mission.



<p>Company Objective Increase Profit by 20%</p>	
<p>Sales Objective Increase Sales by 8%</p>	
<p>Retail Sales Managerial Objective Increase Retail Sales by 10%</p>	
<p>Frontline Objective Upsell 1 Customer Out of Every 5</p>	<p>Frontline Objective Achieve a 9/10 Average for Customer Satisfaction</p>

When you give a retail sales associate line of sight, their work suddenly takes on more meaning. They're not handing out referral cards for the sake of it. They're encouraging customers to refer friends and family to increase retail sales and boost profits.

"Every team member or employee needs line of sight," says Cheryl DeSantis, Chief People Officer & Diversity Officer for SmileDirectClub, a 6,000 team member next generation oral care company with the first medtech platform for teeth straightening. "How does what they're doing every day contribute to the company goals?"



BEYOND JUST TEXT ON A WALL

But printing out a giant pyramid of purpose poster and throwing it on the wall won't cut it on its own. Frontline teams have been long ignored by management. A lot of workers aren't used to engaging at a corporate or even business unit level. If you want frontline workers to engage with the wider organization, you have to make the first move.

"I was working with this Director called Rachel and she held a town hall, which has never happened before," says Anna Egan, Manager, Customer Experience and Business Development - A1 Air Conditioning and Heating. "It was a new concept. You had these people who had been working there for years, coming in and clocking in and clocking out. No one talked to them about the business or how the business was doing."

Anna (A1 Air Conditioning and Heating) explains that it took her Director some time to generate buy-in and engagement. At the start, folks weren't sure why someone was explaining the inner workings of the company. Gradually, things fell into place. Everything clicked in their minds. They began to realize how their work fitted into a larger mechanism. Perhaps most importantly, they recognized how their work directly impacted the success of the company.

Other leaders take a more personal approach. Ryan Minton, Area General Manager - TPG Hotels and Resorts, sits down with employees and spells out the importance of customer service and how it equates to more repeat books, more referrals and higher occupancy rates. When times are tough and he's cutting hours, these conversations are all the more important.


"We have tough conversations," says Ryan (TPG Hotels and Resorts). "Say we post the schedule on the wall and the front desk agent comes into the manager's office upset about their lack of shifts. We'll explain that occupancy is down and that impacts hours. I think that's bringing it all together."

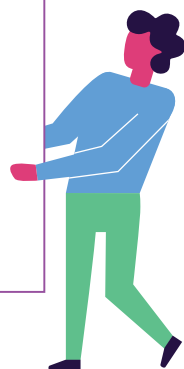




Top tips for creating clarity



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- ✓ Use cascading objectives to break ambitious missions and goals into relatable targets. Share your whole strategy, not just a section of it, to help frontline workers understand where they fit into the wider company.
 - ✓ Communicate, communicate, communicate. Bring frontline workers into the conversation. Share how the company is performing and highlight their part in its successes.
 - ✓ Don't be afraid to tackle corporate purpose and performance in personal conversations. It's one of the most effective ways to demystify company operations and results.



Set key metrics and share performance results daily

Joe Thornton, Executive Vice President/Chief Operating Officer for HMSHost, has a harder time than most connecting his frontline to the bottom line.

HMSHost is the airport food service company behind thousands of locations in North America. They run some locations on behalf of partner brands like Starbucks, Pret and Shake Shack. Others are local flavors like Flying Dog and Blanco. Also, a few are exclusive brands like Barcuterie and La Familia, which are owned and operated by HMSHost.

With such a complex web of organizations and ownership, Joe (HMSHost) faces an eternal engagement challenge: How can he get a Starbucks' baristas to care about HMSHost's revenue targets? How does he get a local bar manager at Flying Dog to buy into his growth goals?

His answer is simple: "You've got to explain what's in it for them."

He uses the same cascading objective idea as Cheryl (SmileDirectClub), translating company-wide goals into business unit objectives and those into targets for individual locations. Instead of seeing HMSHost's trio of strategic objectives—"grow our guest experience, grow our people, and grow our restaurants"—frontline workers see just one goal and one metric.

"You have to streamline the message," explains Joe (HMSHost). "If it isn't quickly memorable at the store or the restaurant level, there's really no chance of being successful."

But selecting a metric is difficult. Retaining a financial connection to the organization is essential, says Joe (HMSHost), otherwise it becomes esoteric and meaningless.





FIGHTING AGAINST RIGIDITY

But don't go too rigid, either.

"You need to cut through the red tape of using only financial gains metrics to prioritise customer experience," he continues. "That builds loyalty and that's where you're going to build profitability."

He uses service metrics like a daily sales goal or quarterly staff retention goal. They're tangible and simple. It's easy for frontline workers to know whether or not they're on the right track.


Once set, it's down to frontline managers to relentlessly record and report on performance. Different organizations operationalize this differently. Take Starbucks. Each store automatically measures sales revenue. At the end of every day, the store manager exports the sales report and shares it with their team members. It creates real-time line of sight between their role delivering customer service and the business outcome it contributes to.

Famed fitness chain Barry's does similarly. After the last class of the day, studio managers write their Daily Manager Summary, which covers both quantitative performance (attendance, retail sales, and so on) as well as qualitative insights (client feedback, employee insights, and so on).

Setting goals and connecting them to day-to-day work is incredibly impactful. A handful of specific, ambitious, but achievable goals can push employee performance into the 80th percentile. Adding a metric to track performance toward that goal improves their work even more.



Top tips for setting and sharing metrics

- 
- ✓ Streamline company objectives into a single frontline goal. Make it clear how individual employees can impact the goal. If you can't join up the dots, your goal is too abstract.
 - ✓ Ensure your frontline goal stays connected to corporate performance. If you let it become esoteric or vague, it'll lose its impact.
 - ✓ Track and report on performance daily. Share results with your whole frontline team. Cultivate buy-in and encourage workers to take ownership of the results.

There's still something missing however: reward and recognition.



Reward outstanding frontline performance

It's an incontrovertible fact that better frontline operations drive improved corporate performance. Increased revenue, higher earnings per share, greater market cap, you get the idea. Those achievements can mean next to nothing for most frontline workers. That's tremendously unfair, because corporate success is their success, too.

After Chapter 4: Recognize Achievement, you should have lots of great ideas for rewarding your frontline workers. But what changes when you're rewarding folks for driving corporate wins and improvements?

It starts with small wins. When a frontline team achieves their goal, that's grounds for celebration. It doesn't have to be a huge gesture, either. At Magic Kingdom, Dan Cockerell, former Vice President, Magic Kingdom for Disney, kept a stack of thank you cards on his desk. When he saw someone exemplifying their frontline goal—deliver magic for guests—he'd write a quick note and send it off.

Other frontline leaders implement more rigid reward structures.


Jerry Campbell, former Director of E&I Ops Consumer Service for UnitedHealthcare, sets out his promises early.

"How can we relate individual goals to company goals in such a way that they feel enthused?" he says. "It goes back to the expectations once they meet those goals."


Does consistently hitting your key metrics a quarter secure a bonus? Does exceeding a certain performance threshold put you up for promotion? The specifics are important, but it's *communication* that's the keystone.

Frontline leaders must make rewards crystal clear to their employees. When people hit their numbers, you have to deliver those rewards—fast. Because as Jerry (UnitedHealthcare) puts it, "At the end of the day, customer experience begins and ends with employee experience."





Top tips for linking performance and rewards



- ✓ Explain how each frontline worker's performance impacted the company's performance. Continually reinforce the relationship between the frontline and the company objectives.
- ✓ Celebrate performance and achievements as a team. Your frontline team helped drive corporate success, so don't leave them out in the cold.
- ✓ Create transparent reward structures. Clearly communicate to frontline workers what happens once they achieve their goal or objective. Is it a financial reward? A promotion opportunity? A team party?



Course correct as a team

Every Barry's fitness studio has financial goals, including revenue and profit. When a studio falls behind, Senior Vice President Operations for Barry's, Devin Murphy, is quick to step in and offer support. But she doesn't just rely on centralized data or managerial reports. She takes a '360-degree approach' which includes tapping frontline workers for insights.

Centralized performance data tells her when something is wrong. Qualitative insights reveal *why*.

"If we make decisions based solely on data from a corporate office, we might miss something pretty big," explains Devin (Barry's). "We take a lot of time to actually talk to managers and instructors."

When she discovers a root cause, she starts digging. Say customers are only trying Barry's once before churning. Why is that? Did they switch to a more convenient location? Is there a marketing campaign targeting the wrong audience? Is there a problem with the experience they received? That last explanation is a red flag.





There are a lot of different reasons why someone might choose not to come back, but we never want it to be because they didn't have a great experience in the studio," says Devin. "We look at the entire studio, talking to our managers and our frontline workers. Whatever the issue, we try to discover what's not working.

Devin Murphy
Senior Vice President of Operations, Barry's

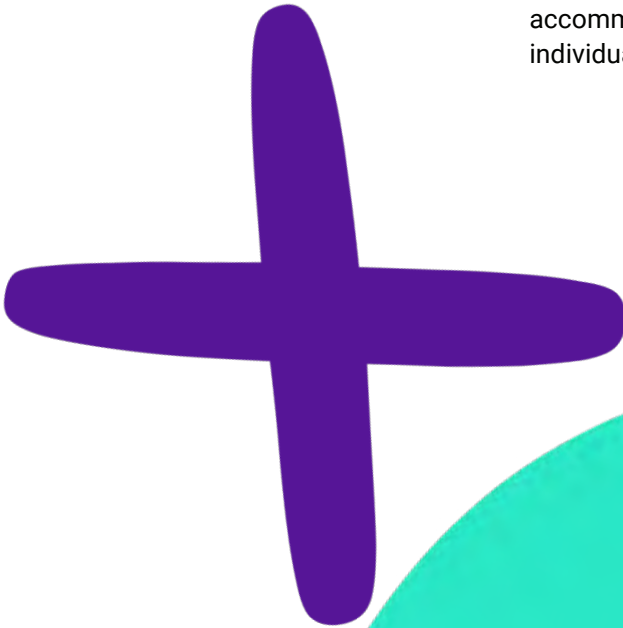


Devin's decentralized discovery and decision-making process is lauded by management experts.

They recognize that even the best leaders have blind spots. As organizations grow or market conditions turn tumultuous (think recessions, pandemics, and other crises), those blind spots grow.

Leaders who shoulder the entire decision-making process end up selecting strategies and tactics based on piecemeal information. Decentralization allows leaders to patch over their knowledge gaps and harness others' skills and expertise.

Thomas Malone, professor at MIT Sloan School of Management, writes: "Decentralization has three general benefits: (1) It encourages motivation and creativity; (2) it allows many minds to work simultaneously on the same problem; and (3) it accommodates flexibility and individualization."





Top tips for team-wide course correction



- ✓ Take ownership for your knowledge gaps as a little humility goes a super long way. As a leader, recognize that you can't know everything about everything.
- ✓ Talk to frontline workers to work out why performance is faltering. Use tactics like skip-level meetings (having an employee talk directly to their boss's boss) to encourage openness and honesty.
- ✓ Share the praise. When frontline workers help surface root causes of problems and suggest potential solutions, give them the credit they deserve.



Drive better investment decisions

Customer experience is never perfectly consistent across a company. Some stores will deliver an outstanding experience as measured by NPS. Other locations will manage only a mediocre performance.

Those differences matter.

Locations, teams and employees with the highest NPS scores consistently achieve better business outcomes: higher repeat business, increased referrals, reduced rework, lower staff turnover, the list goes on.

Overall company NPS grows by closing the gap, by turning your low- and average-performers into frontline superstars. When you improve your overall NPS, you drive improvements in your overall business outcomes.



It's easy to appreciate the opportunity of improved frontline performance. What's more difficult is quantifying the potential gains.

Until now.

We developed a free Return on CX model to help organizations attach dollars and cents to customer experience improvement.



Specifically, it quantifies return-on-investment in projected opex savings over the next three years—lower customer acquisition costs, enhanced productivity, diminished recruitment costs, and so on.

Drop some basic numbers into our model and we'll crunch the numbers for you. Once you understand the relationship between CX and financial performance (and you have the numbers to back it up), you can go on the offensive.

You can pitch a quantified business case to improve customer experience, through frontline success, throughout your organization. By demonstrating real business value, you can prove it's not a vanity project. It's a tangible lever for growth—and you have to pull it.



Top tips for building a CX business case

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- ✓ Implement change and track performance relentlessly. Investigate how your performance improved—higher average order value, increased repeat business, and so on.
 - ✓ Use our Return on CX model to calculate potential opex savings of new projects and initiatives. Use your early data as proof and justification for change.
 - ✓ Don't take your foot off the gas. Change initiatives inevitably lose momentum. Unless you're continually pushing for progress, organizations can stagnate—or worse, go backward.
- 



We're all on one team

In his book *Services Marketing*, long-term business executive turned industry commentator John Bateson described frontline work as a “three-cornered fight.” The customer (demanding attention and service quality) and the company (demanding efficiency and productivity) sit at two ends of the spectrum, he explained, with frontline workers caught in between.

Bateson’s ideas held up for years. Business leaders generally agreed that there was a tension between the efficiency-mad organization and experience-focused consumers. Recently, people began pushing back.

Quality customer experience isn't at odds with commercial success. In fact, it's a key driver of it. Bateson's “three-cornered fight” evolved into a circle, where quality service improves customer experience, which drives better commercial outcomes, which support frontline workers. Although it doesn't always feel like it, we're all on one team—customer, company, and frontline worker.













Make it happen

How we think about frontline work has changed, but how we treat frontline workers hasn't. Business leaders are quick to leave them out in the cold, under-communicating their value and impact.

But you're ready to change that.

Here is a quick checklist to get you started.

STEP	PROGRESS
 Show how everything cascades into the level above. Break down your corporate mission and objectives into business unit, team, and individual components.	Complete 
 Select one or two memorably key metrics for your frontline teams. Think: daily sales goals, customer satisfaction score, or similar.	Complete 
 Report on your key metric daily. Make it a core part of your daily routine.	Complete 
 When things go wrong, use your team as a resource. Ask how frontline workers and managers would solve problems.	Complete 
 Use our Return on CX model to calculate the potential business impact for customer experience improvement. Use it as justification for new projects and initiatives.	Complete 

CHAPTER VII

UN-MUTE THE FRONTLINE



Un-mute the frontline

WHAT'S INSIDE?

Frontline workers are some of the most informed, passionate, and smart folks in any company. So why don't you give them a way to contribute their ideas and insights? Learn how to design frontline feedback systems, turn ideas into action and cultivate a psychological safety net.

Let's go back to the summer of 1993.

Michael Jordan just retired from basketball (for the first time, at least). A rogue T-rex is rampaging across Isla Nublar. And in California, a couple of Starbucks stores are about to make history.

It was a sweltering summer and customers were flooding into Starbucks stores, but they weren't asking for hot drinks. They wanted iced coffee. That seems straightforward *now*—after all, Starbucks sells all sorts of cold coffees. But back then, it was a different story.



In 1993, Starbucks wasn't the worldwide phenomenon it is now. It was a fledgling coffee chain with fewer than 300 locations and a small product range. Iced coffee was niche and unheard of. That didn't stop frontline employees from listening to their customers.

"The local store manager went out, bought a blender, and created a blended iced beverage," says Christine McHugh, former Vice President, Customer Service and Operations Services - Starbucks. "It was against protocol at the time, but customers were demanding cold beverages."

Listening to their customers and reacting quickly proved to be a masterstroke by the frontline team. The blended drinks took off in California, and then the whole of North America. The first week of company-wide sales, Starbucks sold 200,000 blended drinks. The next week, it was 400,000. Then 800,000.

Today, cold beverages account for more than half of Starbucks' sales—and they owe it to frontline innovation.

Starbucks' cold coffee success proves something we've known for a long time. **When employees share information and ideas, companies enjoy greater creativity, enhanced innovation, and improved performance. It makes sense, right?**



Frontline employees are the people who live and breathe the customer experience. If they're empowered to share that experience with leadership and make it right for the customer, that only helps you improve the customer experience.

Ryan Minton
Area General Manager, TPG Hotels and Resorts



Frontline workers are the people in the trenches. They hear feedback every day about any frustrating issue or product request.

Despite everything we know about the benefits of knowledge sharing, it's still not common. Employees sit on criticisms, ideas, and experiments. Some are scared to rock the boat and upset their line manager. Others simply don't know *how* to suggest something.

Millions of frontline workers all around the world are being silenced. Companies, business units, and leaders are voluntarily choosing *not* to listen to their most valuable resource—their employees.

That's crazy.

It doesn't have to be this way.

What you will learn...

In this chapter, we'll reveal how leaders can design and implement feedback channels for their frontline workers.

We'll discuss what it takes to create and nurture a culture of sharing.

And we'll learn what it takes to turn discordant ideas into impactful tactics and strategies.



Encourage people to share, but never force them

Imagine you're a frontline worker at a retail chain. You have lots of good ideas about process improvements—creating a dedicated returns line, running peer coaching sessions, and more—but you aren't sure who to take your ideas to.

One morning, your line manager says one of two things:

- *“Morning! Headquarters needs our help. Times are tough and they want our advice on potential improvements, tweaks and changes we could make to the store. If you have any ideas, just grab me for a chat.”*

- *“Morning! I just got word from headquarters that your performance review has changed. Now you're being appraised on process suggestions and improvements. Can you bring two ideas to your next one-on-one?”*

Which of the two do you think would motivate you more? The first option, right? The two interactions are *similar*. They're both soliciting feedback, but the language and psychology couldn't be more different.

The first is what's called autonomous motivation. That's encouraging someone to do something “because it is meaningful or enjoyable,” according to workplace productivity researchers.

The second is *controlled* motivation, which is “doing something to get a reward or avoid a punishment.” Although they have the same desired outcome, their impact in the real world differs greatly.

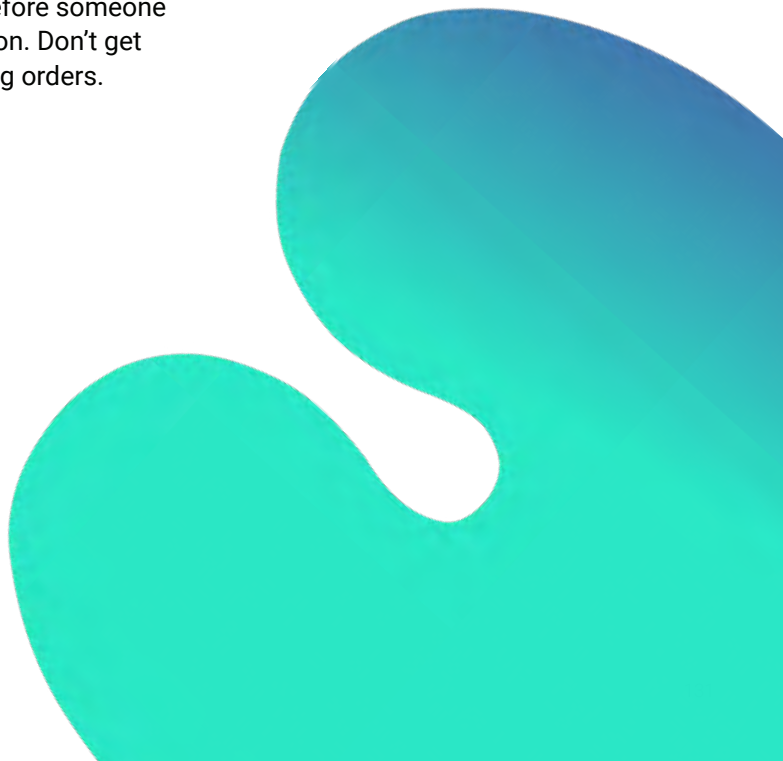
When autonomously motivated, people open up. They bring new ideas to the table. They offer criticisms of broken ways of working. They suggest strategies to improve and adapt. On the other hand, when you force people to contribute through controlled motivation, they throw up their defenses. They *hide* their knowledge.



Practically, this means investing in employee education. Discuss *why* frontline workers are best placed to offer ideas, insights, and improvements. HBR puts it like this: “If workers do not understand the importance of sharing knowledge to reach unit or organizational goals, they will be less likely to share that knowledge. And if workers are pressured into sharing what they know, it could backfire.”

Connect the dots between their suggestions and success. There’s nothing more demotivating than shouting in the void, so make the next steps clear. If a frontline worker offers a suggestion, what happens? Where does it go? Who evaluates it? If it’s implemented, what’s in it for the person who came up with the idea?


Finally, hold your nerve. New initiatives take a while to pick up pace. It might be weeks or months before someone offers a good suggestion. Don’t get scared and start barking orders.

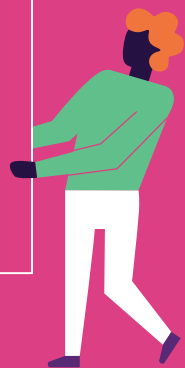




Top tips for encouraging employees to speak up



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- ✓ Controlled motivation makes employees hold onto knowledge. Autonomous motivation encourages them to open up. Understand the difference between the two tactics and lean heavily on the latter.
 - ✓ Invest in employee education. Autonomous motivation relies on workers understanding the value of their contribution. Connect the dots between their idea, impact, and reward.
 - ✓ Bring everything back to real examples and feedback. If Bob from Arkansas complained that a process was confusing, report that to your frontline workers. Make it clear that you're listening to customers and taking action.



Design feedback channels and rituals

Starbucks was lucky to stumble on the frappuccino. Back in the 1990s, there were no feedback channels or corporate idea boxes. If the innovative manager chose to overlook his employees' feedback, it would have been a completely different story.

(Somewhat concerningly, many managers do overlook good ideas. Worse, they often actively disregard suggestions and discourage their employees from speaking up.)

Fortunately for Starbucks, the store manager did take initiative. He picked up the iced coffee trend and ran with it. But companies can't rely on individual moments of brilliance. To harness frontline suggestions and ideas, organizations need formal feedback channels—mailboxes, meetings, sessions, and so on. If an employee has a great idea, they should know precisely what to do with it.

Devin Murphy, Senior Vice President Operations for Barry's, relies on daily reports from the fitness company's 70 or so studio managers. The report, completed at the end of each day, tracks performance metrics like attendance and retail sales, but it also includes a large section for qualitative observations where studio managers can summarize customer feedback. They can also include their own ideas for marketing campaigns, studio tweaks, process improvements, and more.

The reports create a direct line between the frontline and C-suite. If a studio manager has a great idea, they can include it in their daily report, and ensure it's not only read by Devin (Barry's) and her colleagues, but also considered for future endeavors.



For other organizations, innovation happens in big bursts, rather than daily sparks.

“The best way to make an impact is to work together in mastermind sessions,” says Josh York, Founder and CEO for GYMGUYZ, an in-home personal training company. which boasts more than 250 locations, 400 personal trainers, and 100,000 customers around the world.

Throughout the year, Josh (GYMGUYZ) runs several retreats for his teammates. They fly in from all across the country for a weekend of intense brainstorming. The sessions dial in on a specific theme or topic. People let loose, bounce ideas off each other and drive the company forward.

“Everybody’s on the same page,” says Josh (GYMGUYZ). “That alone has created so much impact within the business because people are more productive and aware.”

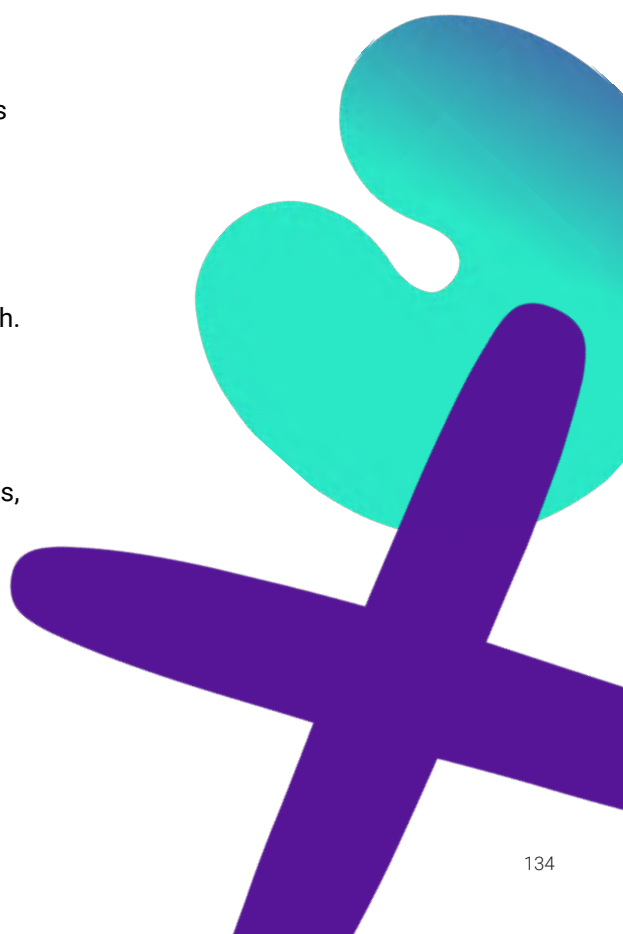
Others take a more intimate approach.

Anna Egan, Manager, Customer Experience and Business Development for A1 Air Conditioning and Heating, tries to have “continuous, ad hoc side-by-sides” with all of her employees. She pulls them aside for a quiet conversation and lets them know she isn’t there to judge, appraise, or critique them. These are informal conversations where any idea is a good idea.

Whatever the feedback she receives, Anna (A1 Air Conditioning and Heating) always makes a game plan: How can she take that feedback and implement it? So often, this step is missing for feedback mechanisms.

Another must-have is an always-on channel. A Slack channel, anonymised email address, or phone number. If inspiration strikes in the middle of the night, you can’t rely on people remembering until their next one-on-one or company off-site.


Whatever channel you select, give frontline workers the ability to check-in as soon as they have a great idea—or you risk losing it.





Top tips for soliciting frontline feedback



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- ✓ Recognize that employees rarely speak up on their own. If you want to collect ideas, criticism, and feedback from your frontline workers, you have to take the first step.
 - ✓ Design a range of feedback channels. Include some on a daily cadence (managerial reports, huddles, and so on) and other larger but less frequent options (companywide mastermind sessions, off-sites, roundtables, and so on).
 - ✓ If you build it, people (probably) won't come. Tell your frontline workers about your feedback channels. Invite them to contribute and share success stories for a bit of social proof. When someone does contribute an idea, make a big deal of it.



Turns ideas into implementation

“Ideas don’t make you rich. The correct execution of ideas does.”

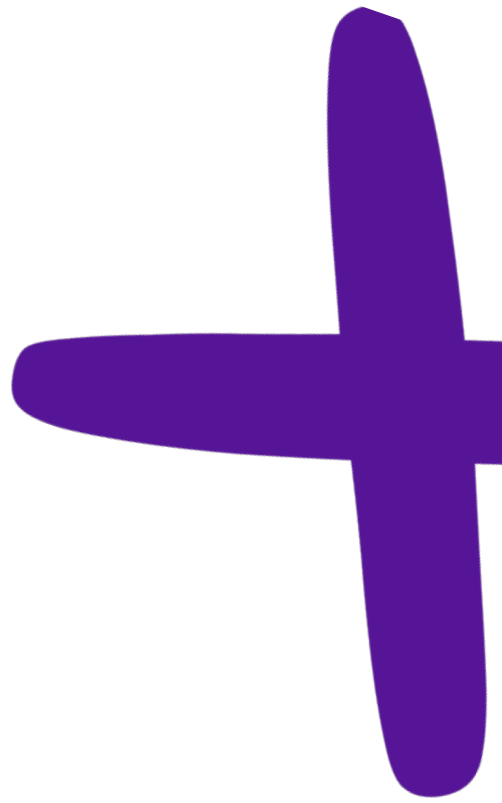
“No excuses. No explanation. You don’t win on emotion. You win on execution.”

“Execution is everything.”

If you haven’t noticed, the business world is kind of obsessed with execution. For good reason, too. The best idea in the world is worthless unless you can turn it into reality. Not only that, but a lack of implementation will leave your frontline workers demotivated and disinterested. Think about it. Why would they bother contributing ideas knowing that they’ll never see the light of day?

Before you start asking for feedback, you need a solid plan for what comes next.

Here’s how you do it.



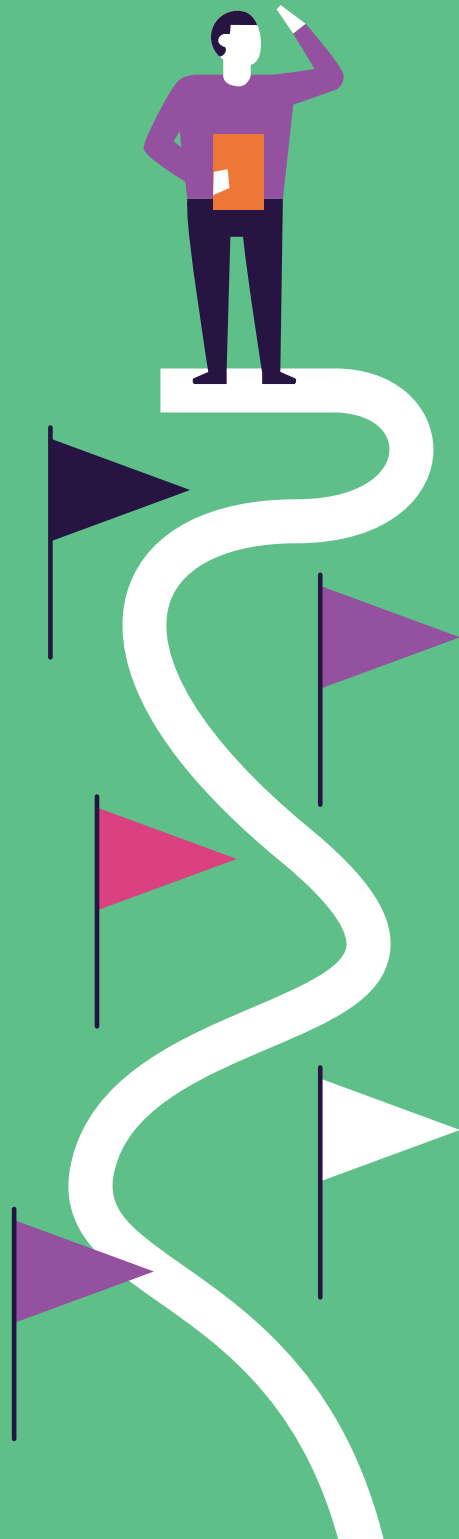
GATHER AND ANALYZE FEEDBACK

At GYMGUYZ, every single iota of frontline feedback funnels back to a central intake within the company's operations department. Josh (GYMGUYZ) calls it the 'parking lot'. Once content hits the intake, his operations team springs into action, poring over the details and looking for anything they can fix or implement.

"We work through everything and pull out anything that's a real red flag," he says. "We address it internally right away."

But it's not just red flags that he's looking for. GYMGUYZ's frontline employees often come up with innovative marketing ideas and process improvements. These go through the same intake and analysis process: intake, review, execution.

Sometimes ideas don't jump off the page or screen, however. Sometimes they're subtle suggestions or tweaks. Here, it's important to look for patterns.



LOOK FOR TRENDS

Regional Vice Presidents (RVPs) at Starbucks oversee between 400 and 600 stores. With all employees encouraged and empowered to speak up, the RVPs deal with a huge amount of feedback. It's easy to get lost in the noise.

Christine McHugh, former Vice President, Customer Service and Operations Services for Starbucks, advises leaders with similar circumstances to search for trends, rather than individual ideas.

"If you're hearing a theme, you know it's something," she explains. "In my time at Starbucks, I can think of lots of different things that came up—whether it was a new process that wasn't working for the customers or repeated requests for something."

As to what constitutes a theme, consider borrowing the "10" threshold from product marketing. Essentially, if you see something 10 times, it's worth investigating as it may represent widespread customer preferences, desires, opportunities, and so on.

That's not to say that anything less than a theme is worthless. Great ideas and suggestions can exist independently, she says. But when dealing with a large organization and making decisions that affect complex operations, trends are an incredibly powerful tool.



TAKE ACTION AND FOLLOW UP

Have you heard the story, “Whose Job Is It, Anyway?”

This is a story about four people named Everybody, Somebody, Anybody, and Nobody. There was an important job to be done and Everybody was asked to do it. Everybody was sure Somebody would do it. Anybody could have done it, but Nobody did it. Somebody got angry about that, because it was Everybody’s job. Everybody thought Anybody could do it but Nobody realized that Everybody wouldn’t do it. It ended up that Everybody blamed Somebody when Nobody did what Anybody could have done.

The moral of the story is: When no one takes responsibility, nothing gets done.

When you’re designing your employee feedback process, constantly ask yourself, “What comes next?” Say a frontline worker suggests a new complaints process. Who is going to flesh out the idea? Who is to design a proof of concept system? Who is going to test it on customers? Who is going to make the final call?

Your entire evaluation, testing, selection, and implementation process should exist before a frontline worker ever contributes an idea. Don’t hide your processes away, either. Explain to your employees what each next step entails and how they can follow the progress.

When great ideas make it live, report back to the employee. Include them in the celebration and recognize them as the innovative genius who kicked it all off.



MAKE EVERY STEP TRANSPARENT

There's a psychological phenomenon called wisdom of the crowd. It's the idea that a group of people is smarter than each individual. If you harness it properly, it can really help with idea generation, development and selection.

Say a barista has a great idea—a takeaway coffee subscription for nearby office workers. Instead of paying for brews one at a time, they can pay a monthly fee and pick up unlimited drinks. To best evaluate that idea, you want to share it with your whole team.



Frontline leaders and workers can weigh in with tweaks, suggestions, and concerns. What about pre-ordering via an app? Should there be a fair use clause? Maybe it should only be available to a select group of VIPs?

The cafe could even open up ideas to voting. Frontline teams could upvote their favorite ideas, leading to the strongest projects and initiatives floating to the top. It's a powerful signal of support.





Top tips for implementation

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- ✓ Don't rely on emails and handwritten notes. Have a reliable feedback collection system and appoint a team to regularly analyze what comes in.
 - ✓ Search for trends and patterns in feedback. Are customers complaining about the same thing? Are employees all suggesting the same process tweak? When something is coming up four or five times, you know it's a serious problem to fix or prime opportunity to seize.
 - ✓ Design your feedback implementation system before asking for feedback. Document, test, and communicate it. Frontline workers should know exactly what will happen if they make a suggestion.
- 



Create a psychological safety net

In an ideal world, frontline workers would speak up whenever they have a great idea. But in real workplaces, that often doesn't happen. A key factor as to why is *psychological safety*.


Harvard Business Review explains “The belief that one can speak up without risk of punishment or humiliation—has been well established as a critical driver of high-quality decision making, healthy group dynamics and interpersonal relationships, greater innovation, and more effective execution in organizations.”

Where workers don't feel psychologically safe, they'll hold onto ideas and sit on concerns. But fostering psychological safety is easier said than done. Thankfully, Amy C. Edmondson, Novartis Professor of Leadership and Management at Harvard Business School, and Mark Mortensen, associate professor of Organizational Behavior at INSEAD, have some simple advice.





Top tips for a supportive workplace

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- ✓ Set the scene: Sit down with your team and lay the challenge on the table. You need them to speak up and they need to be free from judgement, punishment, or humiliation.
 - ✓ Lead the way: Often, words are just that—words. If you want frontline workers to speak up without fear of a backlash, you have to make the first move. Expose your own vulnerabilities, be humble, and share ideas.
 - ✓ Take baby steps: Cultural change is more slow burn than big bang. Keep sharing ideas yourself and encouraging others to do the same. Eventually, folks will follow your lead.
 - ✓ Share positive examples: When frontline workers start speaking up, don't leave their ideas to hang in the ether. Celebrate all contributions—good, bad, and outlandish.
 - ✓ Be a watchdog: Psychological safety takes a long time to build, but one angry outburst to destroy. When you see people undermining contributions or embarrassing people for ineffective suggestions, make sure those behaviors don't continue.



Unleash your frontline

Frontline workers are an enviable resource for businesses.









They are adept market researchers, studying customers for trends and patterns. If a new product is falling flat, they're bound to hear first. They're expert problem solvers, too.

If a process, policy, or piece of equipment is faulty, they're likely to know how to fix it. They're untapped innovators, with unparalleled insight into opportunities and challenges.



Make it happen

Unfortunately, frontline workers are often muted, overlooked, and uncalled on. But you're ready to fix that. **Here's a quickfire checklist to get started.**

STEP	PROGRESS
 Reword controlled motivation statements as autonomous motivation statements. Make workers want to offer suggestions and ideas.	Complete 
 Design robust feedback channels that can carry feedback from the frontlines to decision-makers. Always include an always-on option so people can communicate whenever inspiration strikes.	Complete 
 Design feedback gathering, analysis, and implementation processes. Communicate them to your team so everyone knows what happens after they make a suggestion.	Complete 
 Cultivate psychological safety in your workplace so workers aren't afraid of speaking up.	Complete 

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CREATING FRONTLINE MAGIC: the seven daily habits of world-class frontline teams

Experience brands grow faster than their rivals. Powering their growth are millions of interactions between their frontline workers; and their customers. Frontline work isn't only critical to their success; it's responsible for it.

This must-read manual focuses on how some of the world's best customer experience brands create exceptional customer experiences; and how you can too - by empowering your frontline teams. We've distilled game-changing knowledge and experience from renowned frontline leaders of brands including Disney and Starbucks, Barry's, Sun Country Airlines and more.

Understand why empowered frontline teams matter and then create your own by applying seven habits from seven powerful truth-talking chapters.

Each chapter is a practical guide that enables experience-minded organizations to learn from the best and up their game. Learn from memorable stories. Access insights and metrics. Apply practical processes and tools.

Creating Frontline Magic will guide you through each habit step-by-step:

1. Set Your Service Standard
2. Do One Thing Better
3. Get Feedback to the Frontline
4. Recognize Achievement
5. Coach for Small Improvements
6. Connect the Frontline to the Bottom Line
7. Un-mute the Frontline



If you want your brand to win on customer experience; you must build a customer experience brand. Creating Frontline Magic will explain how.