



- 'True engagement culture has no hierarchy'
- Empower customers to solve your problems
- Structures for staff & clients to 'tell it like it is'
- Select 'unpredictable' colleagues to team-lead

Go on *break all the rules!*

An unconventional approach to customer engagement achieved a “remarkable” improvement in the languishing Net Promoter Score of a group of leading retail bank branches. RACHEL ESPINOSA explains how her teams got “emotionally connected”.

When it comes to customer engagement, the current strategy models are flawed. Strategy is set by the board and is based on assumptions about what the company thinks it needs to do. A team usually carries out a review and assembles its solutions. The strategy is then rolled out to employees to execute – and everyone fervently hopes that the end user, the customer, gets it.

But, where's the engagement? For employees and customers alike, true engagement comes only if it's ingrained in the company's culture. If customers are encouraged to become an extension of the business, they'll be completely engaged. They'll be more loyal, they'll recommend you, they'll buy more from you. They can help you. The same applies to employees.

This is our central belief at Graymatter IQ, a conviction we aim to bring to life with our clients. And this really does mean breaking all the rules. Customer and employee engagement needs, quite literally, to be built from the bottom up – and be endorsed at the top. Three core attitudes are needed to break the rules:

- Remember that engagement culture has no hierarchy.
- Make this obvious by overtly engaging your teams at all levels in your strategy development.
- Foster this approach as a living, breathing organism. It's about empowering everyone, including customers, to help meet your business challenges.

Now's the time to try something new. This isn't just a nice “to do”, it's a business imperative. As long ago as 2001, I remember reading this in a *Harvard Business Review*: “The distinguishing feature of this new marketplace is that consumers become a new source of competence for the corporation. The competence that customers bring is a function of the knowledge and skills they possess, their willingness to learn and experiment, and their ability to engage in an active dialogue.”

What really resonated for me was the realisation that adopting a novel approach could lead to a completely different level of engagement. It motivated me to try something new. As a Local Director in a leading retail



bank, I was responsible for 12 branches and, when I started in this role, my area persistently delivered below target on its Net Promoter Score.

I'm not an uncritical advocate of NPS: it doesn't drive customer engagement or change customer behaviour, but it's a useful sense check of what your customers may be feeling. And, in this case, it indicated that, culturally, my team hadn't been focussed on putting the customer first. And I could often see this for myself in the way some managers and employees spoke about customers. Buried in their language and mind-sets was a culture built around customers as anonymous "processing, transacting and selling numbers".

It was clear to me that transforming the customer experience was going to be more than just hitting a series of metrics. This was about building a culture where every team member understood the difference they could make to customers. It meant instilling an understanding that our customers pay our wages and that we're therefore grateful they choose to visit our branches.

It meant a complete overhaul. Many things had to change but it started with getting our customers and employees to tell the truth about how it really is. We formed Customer Committees in every branch where customers were invited to come and give us honest feedback on how they feel as a customer, and not just customers who loved us but also those who didn't rate us. We brought all areas of our team into this – product designers, cashiers, sales people, managers.

It was infectious. It was never about holding just one meeting and then we thought we'd nailed it. This was a quarterly review with our customers to tell us like it is. When something went wrong and a customer made a complaint we didn't just apologise, compensate them and send them on their way, we invited them back in to tell us what impact this had on them, how it made them feel so we completely understood what we needed to do in the future to make sure it didn't happen again.

On one occasion a customer complained about one of my branch managers. We invited the customer in to see us both and explain how it made him feel and tell us where we went wrong. He even gave us a coaching session on how we should be selling products and the difference this would make for him! He became part of that branch's Customer Committee and ended up referring his Rotary Club friends to us as customers.

What surprised me most was how enormously receptive customers were about supporting us and helping us to be better. Mobilising our customer base and empowering them to be part of our problem-solving and learning proved the best way to get a real perspective of what our customers want. A survey will never give you this depth of understanding.

But, of course, this also meant mobilising our team. I picked a cross-section of frontline staff to devise our Customer Engagement strategy. You might think the obvious candidates would be the best cashiers and service staff, right? Wrong! I opted for our most experienced but, shall we say, less enthused cashiers, colleagues who probably considered their role as a safe

and reliable income. They weren't typically energised and empowered, and certainly not inspired to make a difference.

The outcome was remarkable. I admired the strategy they devised. And, what's more, they owned it, lived and breathed it, trained others to deliver it and led with passion. They loved delighting customers and took pride in giving the very best customer experience and thrived on wanting those customers to recommend them. They took it all personally and became role models –

precisely because they were not the most predictable choice of colleagues as leaders, others did follow them as they saw just how achievable it was to give an outstanding customer experience.

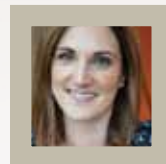
The result of these changes was that we achieved the highest gap closure on NPS in the whole organisation – and we also made a lot more money.

The lesson at the heart of this, I think is: Get emotionally connected. To engage customers, the simple mantra is that

"perception is reality". If a customer feels it, they believe it and this will determine how the customer behaves. If you're serious about getting long-term sustainable results for your business, you need to adopt a clear customer and employee engagement strategy.

But this isn't a quick fix. It's not about getting results today. And the converse certainty is this: if you don't think about your customers being in a long-term relationship with you, your business will be left behind. Unlocking the potential in your people and putting both customers and your employees at the heart of your strategy is what will really differentiate you from your competitors.

YOU MIGHT THINK THE OBVIOUS CANDIDATES TO DEVISE THE STRATEGY WOULD BE THE BEST CASHIERS AND SERVICE STAFF, RIGHT? WRONG!



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