

# Building a culture of wellbeing: dashboards & coaching

See how new PowerBI dashboards are driving actionable insight to support a new style of performance coaching and a culture of wellbeing and engagement.

## Summary

A desire from the very top of the organisation to promote wellbeing and engagement has been embraced at all levels within the contact centre operation in Retail Protection at L&G. This transformation is being driven by a new approach to performance coaching, the new capability developed in the Insight team and great collaboration across the business. Partnering with external expertise brought in fresh thinking and the skills and knowledge transferred in-house is transforming the role of the MI & Insight team. Furthermore, this initiative has been pioneering the use of PowerBI dashboards in the business. This has all driven great excitement in teams, Team Managers have more time to spend with their teams and colleagues feel more supported and empowered whilst early results show marked improvement in attrition and absence.

## Key Initiatives

### Driving transformation and a culture of wellbeing

Learning from FinTech companies has inspired a culture that is transforming the Insurance business, driven from the CEO. This enables agile working, rapid development and workplace wellbeing. Mental health is a key focus across the whole business and has been wholly embraced by Retail Protection. Recognising that key reasons behind absence and attrition rates were often linked to anxiety, stress and depression, they embarked on a programme to completely revamp how colleagues are supported and coached including a fresh perspective on the type of objectives and measures in use. This has resulted in a coaching culture being driven very much from the leadership down. Directors' objectives include reference to staff having standardised coaching sessions and 1-2-1s every month – and these are never cancelled irrespective of service. In essence, this is both a strategic and people-focussed transformation. "We're designing and driving a coaching culture" "It's really being driven top-down".

### Shaping new metrics & dashboards in PowerBI

L&G partnered with The Modular Analytics Company (TMAC) to bring in new thinking and capability. TMAC brought in advanced skills to fast track the use of PowerBI and, crucially, worked with the MI and Operations teams to shape the right metrics and evolve the look, feel and value needed from the user experience. This very collaborative process ensured metrics were kept to a minimum (just four initially), used gentler language, became more customer-centric and engaged colleagues in meaningful, positive coaching conversations. Working at pace and through an iterative process, visual, accessible, self-service dashboards were delivered in just six weeks. Further engagement with MI enabled skills transfer and the team is now using and evolving the templates for other areas. "The collaboration was excellent" "It's not an MI tool, it's a coaching tool".

### See how coaching can underpin wellbeing

The new dashboards have helped underpin the way coaching supports colleague wellbeing – helping to tackle certain causes of absence in the contact centre, such as stress, anxiety and depression. Enabling a change in outlook, simple, quintile scoring moves coaching conversations away from hard numbers, to



*"Colleagues are relishing the time they get to spend with their Team Manager. It gives people the visualisation to help analyse and understand trends."*

**Henry Carman,**  
MI & Insights Manager

*"People have their eyes opened by seeing where they are in relation to their peers. Engagement is blossoming, absence is plummeting and attrition levels are very low."*

**John Trace,**  
Head of Customer Service

*"Team Managers are pivotal to everything, we're creating as much time as possible for them to do coaching. It's not a performance dashboard, it's a coaching dashboard."*

**Adrian Downey,**  
Service Delivery Manager

*"The dashboard is absolutely amazing. I feel I can be a better me."*

**Tony Robins,**  
Customer Service Consultant



## Let the data define where it takes you

## Managing data to exploit capabilities in PowerBI

- Creating data dictionaries and dashboard summaries
- Building reciprocal, supportive relationships with data owners
- Creative use of hierarchies in PowerBI through row-level security functionality
- Focussing on user experience and purpose
- Changing traditional language for key metrics
- Major security protocols for every database

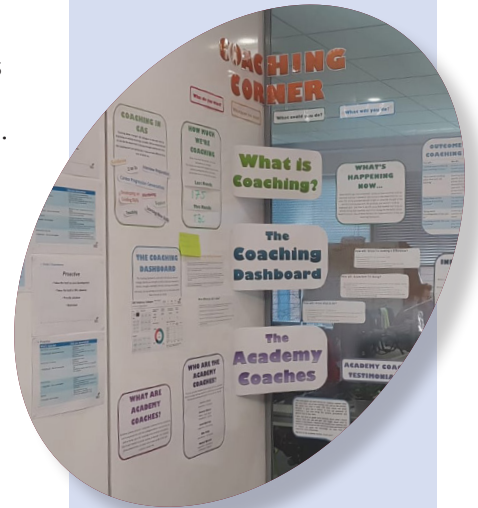
*"It shows how I can change my behaviours to do a better job. You can see it yourself; you're not in the dark."*

*“Dashboards enable us to share information with our teams. I say, where do you want to start; what do you want to talk about first?”*

*“We tailor the coaching based on personality; we give the numbers context. Coaching helps people; it helps embed change and move in the right direction.”*

*“There’s lots of focus on you and your development. It helps you target the things you need to work on.”*

- 17% reduction in attrition 2019 v 2018 and lowest since 2016
- AHT reducing
- Engagement score up 9% (related to time spent being coached)
- Manager time spent coaching increased 60%



*“You can change perception just by changing the language.”*

**Craig Ide,**  
Senior Operational Planning  
Manager

*"I've developed better relationships with my team through coaching and dashboards bringing all the info in to one place."*

**Jo Knight,**  
Team Manager

*"It's changing the way we think about objectives. We got to the value very quickly then transferred and embedded the knowledge into the team. It's customer and colleague centric not cold hard numbers."*

**Sean Northam,**  
Consultant, The Modular  
Analytics Company

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## Improving the user experience

Often the difference between a dashboard driving real business value or being left gathering dust is the consideration of User Experience. The L&G MI team has utilised the skills of different team members, focussing data skills on developing datasets and dashboards whilst focussing business translation skills on interpreting business need into dashboard requirements. This approach ensures that the build of the dashboard is completely tailored to the value users are looking to drive, making sure the solution does that in as simple a way as possible to allow them to do exactly that. L&G paid attention to the context their dashboards would be used within, for example, for coaching conversations with team members. Previously the coach could not have a conversation around their report with team members because it showed the whole team's performance figures. With the new dashboard the coach can drill to the specific team member to have an in-depth conversation about what they've done well and development opportunities. "It's very user friendly" "It helps you have the conversation".

## Key metrics: changing the language

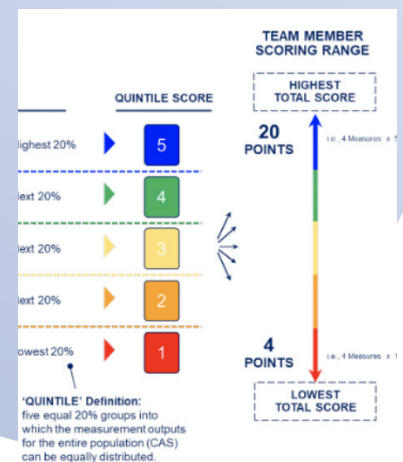
Whilst the metrics used in the current dashboard are traditional contact centre metrics, changing the name has softened the tone, made them more customer centric and, crucially, made them more meaningful for staff – helping them to engage with their purpose on a far wider scale. This is an important change which has enhanced the user experience and truly underpinned the new approach to performance coaching for wellbeing. The new names for these measures were defined through working groups between TMAC, MI Team and Operations managers and colleagues and are:

- "Talking to Your Customer" = Average Handle Time
- "Customer Journey" = % of customers transferred
- "Being There for Your Customer" = Adherence
- "Contact Closure" = Wrap Time

What's more, the names of the four metrics are designed to focus on why they matter, to form a set that covers different perspectives on what makes great performance and to allow for changes in the future. Dashboards are built in such a way that it is easy to swap different measures in and out as the operational culture evolves. It also means that when the work is being adapted for use in other areas, it is quicker and easier, because they can build on what has already been done. "Changing the language has an effect on people".

## Defining the metrics for the dashboard

Defining the new metrics to be built in the new dashboards was a critical step. Clarity was needed on both today's key objectives and what the company is moving towards. Over time, the team is planning to incorporate more outcome measures. For now, however, these measures focus on the inputs to what makes colleagues effective. To support this, TMAC worked collaboratively with the MI Team and Operations' stakeholders to agree the measures to be used and what they settled on is not the end of the journey. For example, they are currently building up a data set for a right-first-time measure. They agreed on a total of four measures to cover the key bases needed. Clearly the dashboards could have contained more, but four is enough to change the coaching conversations which is their prime purpose. The business had to be steered to this point – they initially wanted more measures and data – however, to do so would have diluted the focus away from the coaching conversation. Importantly, as new dashboards are rolled out to other areas, they will all have the same look, feel and approach though, of course, measures may be different depending on the nuance of the area. This means that if colleagues or managers move area, they are still familiar with the dashboard approach and can use them to support the same standard coaching framework. "They help to drive insight and action more easily" "This is one stage of a longer journey".



*"We could do more but four measures are enough for now to change the conversations. The dashboards are dynamic. We cut the data to meet the measures that are important to us."*

Sean Northam,  
Consultant, The Modular Analytics  
Company

*"Support from the front line has been exceptional. They can see it now with their own eyes."*

Henry Carman,  
MI & Insights Manager

*"The language is a new, lighter tone – it's good."*

Tony Robins,  
Customer Service Consultant

*"The dashboards are so helpful. They help you develop as a person. You can feed more back now; you can recommend your own ideas to improve."*

Scarlett Williams,  
Customer Service Consultant

*"Feedback from staff has been really positive. The Union were extremely complimentary about the leadership approach. Simple things make a very big impact."*

John Trace,  
Head of Customer Service



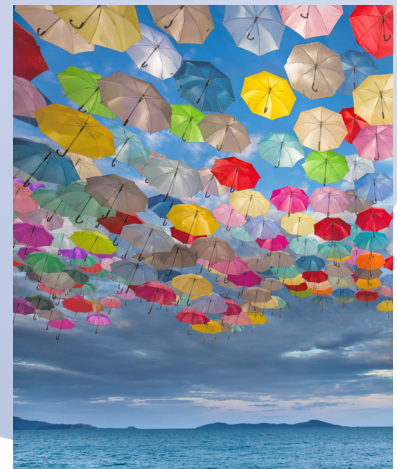
## Supporting team managers to coach effectively

By involving the managers in the shaping and definition of the dashboards they were already part of the transformation journey. Sponsorship of the new coaching approach, from the top, was further encouragement to truly exploit the value of the new dashboards too. All Team Managers were engaged to talk through the new dashboards. Crucially, they worked through how to have the right coaching conversations including looking at data for random colleagues and understanding the key questions that it provoked. Colleagues mentioned how coaching used to feel very much like a parent and child relationship but that has fundamentally changed.

The conversations no longer focus on numbers but on how they are feeling and how they can be supported. Coaching includes dedicated coaching sessions and ad-hoc side-by-side sessions. Managers listen to at least three calls per month for each colleague and estimate up to 60% of their time is spent coaching – with an aspiration to increase this to 80%. Senior leaders are actively freeing up Team Managers' time from other tasks to help them achieve this aspiration. Results are coming through already, even though it is relatively early days on this journey:

- AHT has fallen by 14 seconds mainly through a reduction in wrap time
- Positive upturn in the Pulse Survey (9%) specifically relating to whether colleagues feel they are receiving enough coaching time
- Greater proportion of colleagues meeting or exceeding standard performance expectations
- Attrition is falling – not losing people because they don't like the environment

"Stop talking about numbers and have a better value-add conversation" "Less time with data, more time with people".



*"We're trying to put the customer first, it's a positive move. It's transparent; we're not hiding anything."*

Jo Knight,  
Team Manager

*"The way to get everyone pointing in the same direction is through coaching. 'Being there for the customer' makes people want to adhere more."*

Kate Bulger,  
Team Manager

*"Coaching sessions are led by the individual not the manager. It's more about the progression people have made each month."*

Sean McCarthy,  
Team Manager

*"It highlights what we can do to help our people. It's not a performance dashboard, it's a coaching dashboard."*

Adrian Downey,  
Service Delivery Manager

*"I like the way they coach here. We have lots of autonomy on how to service the customer."*

Tim Cook,  
Customer Service Consultant

### CAS Inbound Call: Overview

Overview of key metric performance over time

330K 178  
Calls Colleagues



#### Select Months to Analyse

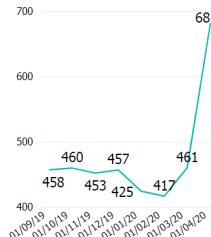
01/09/19	01/11/19	01/01/20	01/03/20
01/10/19	01/12/19	01/02/20	01/04/20

#### Site

Hove	Cardiff
178K	151K

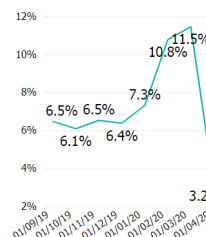
#### Talking To Your Customer...

The average time spent in Talk, Hold & Wrap



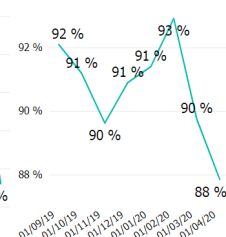
#### Customer Journey...

The % of customers who were transferred



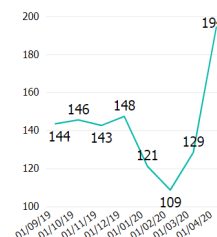
#### Being There For Your Customer...

The % of your time spent with your customers



#### Contact Closure...

The total time spent after call wrapping up



## A mutually supportive relationship with data owners

The work with PowerBI rides on the back of extensive work over a couple of years, in the Planning and Insight teams, to build a strong data capability that could drive action and decision making. For instance, much work was undertaken to get data from a myriad of L&G systems into a central data server, accessed by SQL and ultimately PowerBI.

- Getting access to this data was not an easy process. Data owners across the business were initially nervous about giving this access, concerned about how their data would be used, potentially misinterpretation and conflicts between reporting.
- An example of this is complaints data – the MI team describes it as an ice cream shop! People come in and want all sorts of different flavours from the same data, risking conflicts across many differing reports across the business. This was steadily overcome through creating great relationships with data owners.
- Another great example is the central Business Intelligence team who own data (and insight) relating to policies and sales. Where previously the relationship had been difficult, now a mutually supportive relationship has been developed, through proactively working with them to understand their journey. As a result, an agreement has been forged to access their hugely valuable data. Not only that, in return, the MI team agreed to store some of BI's data after they'd run out of storage and have gained access to it as a result.
- They now work together in a close partnership and concerns about misinterpretation and conflicts have been laid to rest while the MI team can now add even greater richness to their reporting and insight as a result.

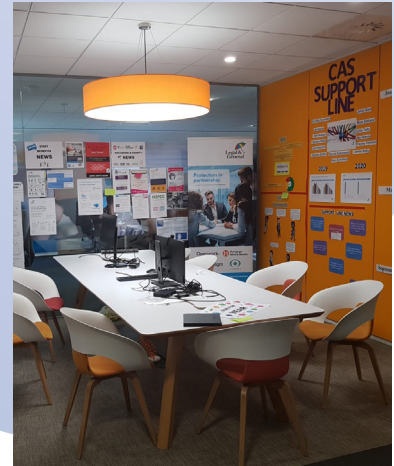
"It's a co-ordinated approach to data that is managed" "It's centralised and provides one version of the truth"

## Single version of the truth: data dictionaries and dashboards

A key goal of the MI & Insights team is to establish a single version of the truth, building a data server and data integrity checks for data from across the business. The creation of data dictionaries and dashboard summaries has been an important element of establishing best practice in this work. Data dictionaries incorporate both definitions of what each data item/metric means and a description of the data source/definition and its owner. These exist as stand-alone databases on the server, for now, and will be linked into PowerBI dashboards as they are developed in the future. Also, as part of the roll-out of PowerBI, the team is now building dashboard summaries into the dashboards, which ensure that answers to common user questions are available in one place, such as:

- When the report was last updated
- The purpose of the dashboard
- A glossary of terms for the measures used
- Future developments for the report in their pipeline
- Known data discrepancies people should be aware of

This allows users to have answers to the questions they'd usually have immediately and reduces time for the MI team to answer these questions. The simplicity of the visuals used and familiar look and feel also help users intuitively know what to do.



***"It's a different skill set. It's taking the team on a journey because that's the need in the business."***

**Craig Ide,**  
Senior Operational Planning  
Manager

***"We needed to unlock the data. Tools are only as good as the data and the people using them. There was a lack of operational information to drive performance."***

**Sean Northam,** Consultant,  
The Modular Analytics Company

***"It used to be very time consuming for Team Managers to pull everything together."***

**Adrian Downey,**  
Service Delivery Manager

***"We've accelerated the learning and skills in our own MI team. It's centralised and provides one version of the truth. Before, every department had their own person sitting in the corner doing MI."***

**Henry Carman,**  
MI & Insights Manager

## Hierarchies in PowerBI: row-level security

A key part of the PowerBI performance dashboards is the ability for managers and colleagues to see the data that is relevant to them only – so the ability to drive down to granular detail at appropriate hierarchy levels was key. The dashboards achieve this through the complex use of row-level security in PowerBI. Crucially this relies on appropriate data security policies and maintaining up-to-date business structures and hierarchies. To do this, they use the 'FTE database', which had been created by Ops Planning as an integral part of their resource planning process. This provides an accurate and up-to-date view of who is in which team and whether people are on secondment, maternity leave etc. Significantly, it is validated on a weekly basis by them with all Team Managers to ensure it is up to date. Focus on maintaining this is critical, though it is not overly time consuming as many checks are automated in SQL. Every month it is also validated against the central HR database. This is true closed loop data validation – the importance of which is evidenced by the fact this database feeds 70 different MI reports. "We can slice and dice data in all manner of ways".

## Security protocols for every database

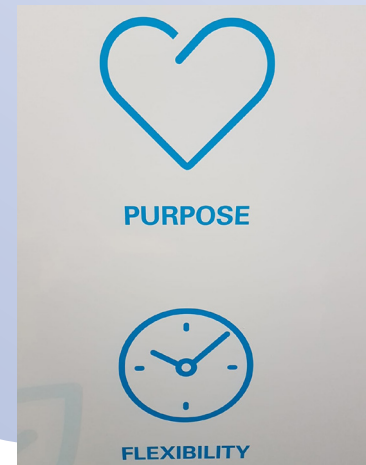
There is a huge set of protocols for every single database on the SQL server and IBM maintain that with their protocols. This means that, for example, the FTE database is quite close to a corporate database. Either way, it is a far better means of storing data than where it is held before it is migrated (often Excel spreadsheets or Access databases). L&G takes an understandably cautious approach to data – for instance every single data item is tagged from a security perspective. Whilst this can create challenges for the MI team in the first instance, working with this and forging the right relationships is ensuring absolute confidence in all data, its sharing and its use which is a real positive for the team. "We're getting data into a place where we can use it and the Operation can exploit it".

***"It's a standardised approach to coaching. A far greater proportion of our people are meeting or exceeding standard performance expectations."***

**John Trace,**  
Head of Customer Service

***"You can feed more back now; you can recommend your own ideas to improve."***

**Scarlett Williams,**  
Customer Service Consultant



***"We've supported the central Business Intelligence team and they've supported us. We're working more in partnership with them. We're getting data into a place where we can use it and the operation can exploit it."***

**Henry Carman,**  
MI & Insights Manager

***"This supports managers to have richer conversations, to spend less time with data, more time with their people. It's very user-friendly. We can slice and dice data in all manner of ways."***

**Sean Northam,** Consultant,  
The Modular Analytics Company

***"It really helps you to see it in a simple way."***

**Tony Robins,**  
Customer Service Consultant

***"It's the visuals, the colours and the numbers."***

**Stuart McCarthy,**  
Team Manager