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Helping your people retain their clients in 2020

This isn't going to be another article or paper reprising the fact that this is a very challenging time. There's no need to replay all that. You already know.

And indeed, some of the arrangements we and our firms have had to make are probably working better than we would have predicted. In large part, the infrastructure, technology and logistics of working from home have been OK, thanks to great efforts from IT people.

But, there are massive unknowns about some of the aspects of the (cliché alert) new normal. These could derail your firm and in particular your competitive position and capability. What are these, and how can you identify and mitigate these risks?

How are people performing?

You have a duty of care to your staff. Some of them will have been completely comfortable in this different way of working, others less so. That doesn't mean they are worse than anyone else, it just means they are made differently and might need some additional help. They are also the ones who may find it difficult to relay any concerns via a Zoom call.

You may be aware that there are productivity issues; some of these will be around "soft" factors rather than around process.

For the future health of your firm, you need to gain feedback from as many people as possible, not just those who are more vocal or comfortable in giving their opinion. You also need to be able to collate this across the whole of your firm and each department, so you can make the right decisions. This is also a way to prove that your values of caring about staff are real. They won't forget that.

How do you tell?

Is there a gap between what clients are telling you they need, and what people are able to provide? Where do you invest effort to close this gap?

Money is going to be tight. Again, no sh*t, Sherlock. You really don't want to lose active clients. So, if there are any material gaps between how clients want you to communicate with, serve or support them, and how you are doing this, you need to know. Again, many won't tell you unless you ask, and ask in the right way.

But equally, you don't want to spend a lot of money in doing this. And you don't want to invest in improvements, only to find out that your investment didn't have much impact, or wasn't focused on areas which you really needed to address. This is why you need to get the views of clients, and of staff, in the most cost-effective way and then take a look at the gap. Well designed, online feedback activity is likely to be the right choice in many cases.

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| What clients want |
| What staff believe clients want |
| What staff are technically able to provide |
| What staff are emotionally able to provide |

What's just one example of this? Training and coaching. As you've got limited resources, do you want to make investments in training that might have a financial payback? Or do you want to make them in training that **will** have a payback, because it deals with what your clients really want, gaps in your current performance, and in ways that you know will help your people deliver this capability?

You can of course make guesses about this. Or you can find out.

How do they feel about the return to work?

Here is a tricky one. We know that over the next few weeks and months there is expected to be a gradual return to working in offices, though possibly never in quite the same way. But how comfortable are people in doing that? How do they feel about commuting or business travel? How will that affect productivity, morale, "sick days" and teamwork?

How does the physical space need to evolve? Is being "Covid-secure" enough, or will staff need greater reassurance? How would they feel about coming back if an organisation does the bare minimum, but not more?

We're working with an organisation that is finding all that out through asking their staff. They're going to include all the feedback in their plans for how office space will work, shift patterns, who can remain out of the office, and other support. Basically, they're demonstrating commitment to being a good employer. But they are also getting really useful, implementable ideas from their staff that will really make a difference.

What is happening to a line manager's ability to lead? How resilient are they?

It's hard for all of us, as individuals. It's hard as managers too, and those leading teams are faced with challenges to their own resistance.

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What support do they need? How can they encourage their staff; do they need extra resources to do this? How can they be supported to work in alignment with your organisation's values? What would they find most useful?

Some of the things that people might find most difficult to talk openly about may be the things that would be most beneficial to them. So think about a way of doing this which is comfortable to them, and where it is recognised that there is no "wrong" answer.

How do you tell?

Don't assume you know the answers to these questions without finding out the truth. Relying on guesses or inadequate information won't be enough in the coming months.

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