



**RAD POWER.BIKES**

# **CX/PS Leadership Enhancement Proposal**

nate minton, 6.9.22



***Great enhancements in tools, communication, and processes have been made in the last few months to help our team members service customers.***

***Here we will review some potential enhancements that will help our leaders coach their team members.***

# Agenda



Step 1: Coaching Model

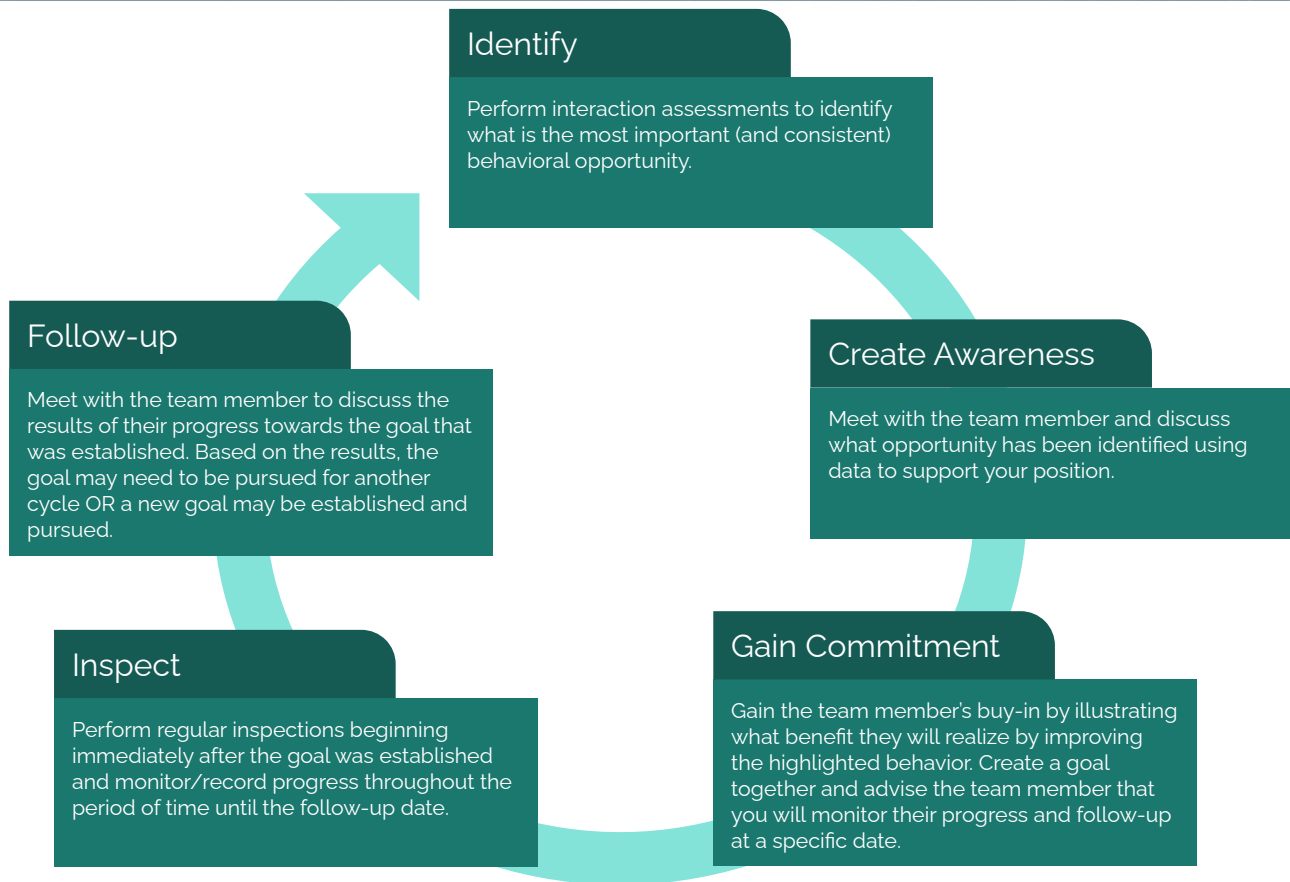
Step 2: 15Five OKRs

Step 3: DITLO

Action Plan

Q&A

# Step 1: Coaching Model



# Step 1: Coaching Model



## Benefits

- Establishes formal standard for leadership training on how to coach a team member
- Grants Supervisors knowledge of a new leadership tool to help improve themselves and their team
- Enable accountability conversations for those leaders who do not execute on the expectations of the coaching model

## Considerations

- Training process
- Different leadership styles
- Varying paces of learning
- Inspection process

# Step 2: 15Five OKRs



**Create a cohesive experience for customers contacting Product Support** 75%

Objective type: Individual Due: 20 days Update status: [Progress bar] Last updated: a minute ago

Objective owner: **CB** Cassandra [Redacted] Product Support Specialist, Tier 2

People who can view (8): **AP** April [Redacted] Product Support Manager

Key Results (2)

- CB** Obtain customer verification during the introduction of calls (5/17-5/31) 60% ... Owned by Cassandra [Redacted]
- CB** Obtain customer verification during the introduction of calls (5/31-6/14) (extension) 60% ... Owned by Cassandra [Redacted]

[Add another key result](#)

Agent Objective

Team Overview

MC	Create a cohesive experience for customers contacting Product Support	Details ▾	20 days	<div><div></div></div>	79%	Follow
MC	Create a cohesive experience for customers contacting Product Support	Details ▾	20 days	<div><div></div></div>	26%	Follow
MC	Create a cohesive experience for customers contacting Product Support	Details ▾	20 days	<div><div></div></div>	12%	Follow
CB	Create a cohesive experience for customers contacting Product Support	Details ▾	20 days	<div><div></div></div>	38%	Follow
[Avatar]	I will not miss any calls	Details ▾	20 days	<div><div></div></div>	33%	Follow
[Avatar]	Maintain a consistent and productive workflow in order to provide an unrivaled customer experience	Details ▾	20 days	<div><div></div></div>	0%	Follow
TT	Provide a positive, informative, and personalized experience for customers contacting product support	Details ▾	20 days	<div><div></div></div>	35%	Follow

MC Maddy C. updated "Obtain customer verification during the introduction of calls (5/31-6/14) (extension)" from -0.01% to 60%.

😊 • Reply • just now

MC Add a comment

**Post comment**

MC Maddy [Redacted] commented:

- 6/2 5:47pm- yes
- 6/3 1:07pm-no
- 6/1 4:18pm-yes
- 6/1 5:59pm- no
- 6/2 5:04pm- yes

😊 • Delete • a minute ago

Key Result

# Step 2: 15Five OKRs



## Benefits

- Offers a practical application of the coaching model
- Provides team members and Supervisors with a prompted goal to build off of each week (15Five Check-in)
- Does not require a formal scorecard as the focus of Key Results is based on observed behaviors
- A leader does not need to inspect every interaction in its entirety since they are only scoring on the basis of what Key Results are being worked on

## Considerations

- Consistent inspection process for all CX/PS leaders
- Alignment on Objectives as they pertain to SVP Objectives.

# Step 3: DITLO (Day-in-the-life-of)



## Daily

### Start of Shift

- Greet team warmly and take an opportunity to connect
- Identify absenteeism and reach out to any team members that are not present to ensure they are okay
- Establish a team goal for the day that everyone can contribute to and work towards

### Throughout Day

- Perform inspections on your team members calls/tickets to determine if they are meeting their objectives/key results
- Monitor Service Level and make sound judgements when pulling team members out of available
- Prep for upcoming 1-on-1s using inspection data you have gathered
- Use that same inspection data to identify wins for team members and recognize in-the-moment (High Fives, Slack, etc.)
- Monitor Slack channels for opportunities to provide guidance

### End of Shift

- Thank everyone for their hard work and express your appreciation for them
- Share the results of the team's progress towards the goal that was set at the beginning of the day

## Weekly

### Start of Week

- Greet team warmly and take an opportunity to connect
- Establish a team goal for the week that everyone can contribute to and work towards
- Establish your own performance priorities as they pertain to your Objectives/Key Results

### Throughout Week

- Complete and review 15Five Check-ins on time
- Distribute new content from leadership staff meetings to team members in a huddle/team meeting
- Celebrate small victories
- Review and approve team member time cards
- Ensure absence reporting is correct

### End of Week

- Thank everyone for their hard work and express your appreciation for them
- Share the results of the team's progress towards the goal that was set at the beginning of the week
- Reflect on your performance priorities and determine progress made on your Objectives/Key Results



# Step 3: DITLO (Day-in-the-life-of)



## Benefits

- Establishes a formal checklist of duties and responsibilities that CX/PS leaders can utilize on a daily basis to stay productive
- Enables better time management
- Eliminates confusion and frustration about Supervisor duties
- Enable accountability conversations for those leaders who do not execute on the expectations of DITLO.

## Considerations

- May appear as a detractor to Supervisor empowerment
- Inspection process
- Supervisors who lead Specialty Teams may deviate from the standard DITLO responsibilities

# Action Plan



1. Begin with the **Coaching Model** for a two week period where managers perform coaching observations of each Supervisor.
  - The Manager will sit in on the first 1-on-1 where the Supervisor and Team Member identify the behavior and establish the goal. Next, the Manager observes the following 1-on-1 where the Supervisor and Team Member revisit the behavior/goal and determine if additional focus is needed or if a new goal may be pursued.
2. Next, train and implement **15Five OKRs** with Supervisor teams that target the same behaviors and subsequent goals that Team Members have been working on in the coaching model.
3. Finally, launch **DITLO** for all leaders to assist with time management. Additionally, it will serve as a great refresher after they have been onboarded to all of the recent leadership enhancements.

# Q&A

