

# Managers Deliver the Customer Experience Through Their Teams

With the right elements, trainers at PLS knew they could create strong managers who could inspire their teams and operationalize their aggressive growth plan.



## The business case

PLS, one of the fastest-growing organizations in the financial services industry, had no formal training for Store Managers except a few eLearning modules on compliance and customer service. They needed a program to help managers operate consistently so customers received the same excellent experience in any location.

To ground managers in the basics of the job, including new competencies, PLS conducted a needs assessment to identify areas of opportunity. The results highlighted three areas: managing people, managing business, and managing themselves, including leadership behaviors, problem solving, and creative thinking.

## The solution

PLS wanted a blended solution – something that would engage as well as educate managers. They partnered with Root to implement the Root Compass® program, which is comprised of four major elements: Know My Role, Know My Business, Connect My Team (to the business), and Deliver Results (through my team). These elements matched the PLS needs assessment on all levels and, in addition, core modules were customized to reflect their business. The program methodology was hands-on and fun, supporting the need to avoid a “school” atmosphere.

## Implementation

As a first step, PLS ran a pilot test in September 2010 with a mixed group: Store Managers, District Managers, and Directors of Operations. It was extremely well received, and as Cindy Caruso, Director of Training, said, “We knew we had the right solution when the most frequent comment was ‘How soon can I have this program in my store?’”

Rollout began with District Managers at an annual conference in April 2011. This was unique for PLS, because people in training did not always get to introduce training from the top down. Senior leadership added an extra day to the conference so the entire mid-management staff could attend. This level of leadership support, combined with custom content and internal facilitation, created unprecedented ownership and buy-in. By the end of October, 300 managers had completed the training.

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### Results

The program had a measurable impact on PLS, with Course Effectiveness receiving an average score of 4.64 out of 5. The company developed a survey, listing behaviors that employees should be able to observe in managers after the course, and these were to be tracked at one month, three months, and six months after attending the course. They are also developing a more traditional scorecard using metrics of turnover and various revenue items. These results will be available in the coming months.

Softer and even clearer measurements included enthusiastic comments from learners:

*“This was the BEST meeting I’ve ever attended in my career thus far! I took so much from this and look forward to sharing with my team. I feel inspired!”*

*“Thank you so much for making me stronger and giving ME the tools to battle all obstacles, not only work but in life.”*

*“Best and most practical training I have done at any company I’ve worked for.”*

*“It was ‘clarifying’ and reminds us what we often forget to do: take care of our staff, not just our numbers.”*

*“This course will help me build a stronger team and make me a stronger manager.”*

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### Next steps

New managers are going through Root Compass® as they join, and PLS has recently been contracted to manage a further 50 stores as a part of its expansion plans. All these managers will be Root Compass® certified by the end of the summer. Assistant Store Managers also go through the program, which is helping build a strong SM bench.

District Managers will be next and follow the same process as Store Managers (needs assessment, competency-driven approach, pilot program). The DM program will be built upon the Root Compass® framework, which is now the foundation of leadership development at PLS.

As a tenured training professional, Caruso concludes, “There is nothing like the excitement of starting a new program that you know will hit the mark and be successful. Being able to articulate the business case while keeping stakeholders involved and paying attention to the details all along the way are the keys to success.”

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### About Root

Root is a strategy execution company that helps organizations engage people as a catalyst for change using a proven framework that consistently achieves clarity, ownership, and results.



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