

Excellence in Staff Performance

Lloyds TSB is the largest bank in Europe and one of the UK's top companies in terms of market capitalisation. It is going through profound change driven by complex mergers - and in the middle of it all are 80,000 staff. Mark Ivery, Senior Manager, Group Employee Research is responsible for understanding and helping to address their needs. His target is excellence in staff performance. He used Paul Dawes and Malcolm Teesdale as facilitators in a project designed to identify the obstacles. Here he discusses his experiences.

Customers First

Lets start at the most important end. There are 15 million Lloyds TSB customers out there who want a job done properly and they have increasing expectations - not unreasonably. They don't want to know about our internal problems. So for us it was as if the changes required a "complete reconstruction of the building whilst all the people were still in there".

Getting the Brief Right

We are, and were, undertaking lots of different pieces of research with staff in order to inform management decisions. For example, we have a major opinion survey, one of the largest in the UK, where all our people get asked 150 questions or so. So this approach was something different for us to try.

The original brief was concerned with accessing the effectiveness of our performance management process. When I talked things through with Paul and Malcolm, we expanded this into looking at the barriers to excellent performance from the staff. The brief became: "What stops you from performing excellently?". Even though the original Lloyds TSB steering team has disbanded, the work still has value and the thing I'm most grateful for is the expanding of that brief.

There's a danger in any large company that the organisation knows best - that we know exactly what we need. Working with the Catalyst facilitators exposed us to new ways of thinking. That has proved valuable time and again, not only more recently, but in using the data from that first project.

Stories that Management Could Hear

At the end of the project, we were looking for ways to present a mass of data in an intelligent way. We had a list of a hundred-and-odd problem statements. We took the high ranking ones and we built upon other survey data to create "stories".

We were then able to make seemingly bold claims with the approach: "This is true because of this cluster of high ranking problems statements". We ended up with 10 slides which we use to deliver the information to senior executives. Each one self contained, telling their particular story. I had a 10-page slide pack which I could wheel out, adjust appropriately and then demonstrate a point to people. And if anybody asked questions, I could get into greater depth, without much trouble. So, as a result of this work, and other pieces we've done, we are able to put a coherent picture forward demonstrating the impact that the various changes are having on staff.

When I am presenting a case, I use our staff opinion survey as it's huge and it lends itself to graphs and numbers: that appeals to a particular set of people. I use direct quotes from people from feedback mechanisms because those who don't like numbers tend to like quotes.

There is always a need to provide a strong high level picture and have the facility to go back and really dig into elements of it. Here we had the ability to go back into elements that we didn't know we were going to have to go into - so we have a good base of data to work from.

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The Process

The outputs had a real depth of data analysis but they also had a measure of simplicity about them that made them very useable.

The process itself is quite interesting. The extraction of the problems from the two groups of employees went very well. The feedback from them was that they enjoyed doing it and were comfortable with the outputs. The collating of the problem statements was a real chore. However it was a worthwhile chore, making sure that we managed the process to get the best out of it. We had to sort out the duplicate problem statements to get to a final set of 150 for ranking by staff. It was a long day, but we got there!

The sort of things that people had been saying to me anecdotally, and the sort of things that I was getting out of other pieces of research, were borne out by the detail in this work. People that have seen the research have nodded sagely.

Although the process concentrates upon the negatives that is not a real problem for us. We tend to focus on what we are doing wrong, rather than what we are doing right. It's perhaps a good thing in a customer service organisation like ours. If we get 99% of it right, we worry sick about the one per cent that went wrong. I deliver research findings to top management all the time and my standard funny line now is; "I have to apologise in advance for the next slide because it's got some good news on it but I promise I'll get through it as quickly as I can and get back to the bad news!" So no, there was no problem with focusing on the negatives because we have a propensity to do that anyway.

We normally expect about 60% response rate from our internal surveys and this one was well over 70%. So it was better than usual, though not as good as Malcolm and Paul would have liked. People reported that they quite liked it, it was different.

The project kept to the timescales we agreed, with the data all back on time, so I can't fault the housekeeping and process management.

With hindsight perhaps we should have nailed down the high level ownership before we started. But we didn't realise that the structure would change and that the people would change, so it didn't seem like a problem at the start.

The rapport was excellent, because of the attitudes of all those involved and we got to levels of thinking that some of us might not have done before. A typical sort of thing was where my ideas had already crystallised and they were able to get me to express my concerns without feeling any need to cover it up. Quite a high level of trust was involved and I felt quite comfortable about that.

I wouldn't try to convince people that this was the right way to go with every piece of research we do. It's a blend of qualitative and quantitative research. Importantly for us, it's non-disruptive: we can't afford people being out of the harness for long.

It has a degree of flexibility about it, so we didn't need to nail down the brief right at the outset and then come to regret it. It has that flexibility to say "Well, we'll actually go in a slightly different direction because we've learned as we've gone along". With some pieces of work, we have to nail everything down at the outset and when we get the results it's a case of: "If only we'd known, we wouldn't have set it up like this". This approach resolves that problem.

Quite often a piece of work will either generate enormous quantities of data and limited degrees of interpretation, or it will be all high level, 'touchy feely' stuff which begs further research in certain areas. I felt this work gave us a good balance.