



Your Frontline Performers* are the First to Know: What's Working? What's Not? How Do We Improve?

**Frontline Performers are directly interacting with, and servicing the customer; including but not limited to sales, customer service, supply chain, finance, accounts receivable, etc.*

INTRODUCTION

Let's start by acknowledging how we accomplish our mission is, and will be, significantly different than how we got work done 18 months ago. We are creating new ways of going-to-market and serving our customers. So, the question is how are we doing? What's working, and what's not? How could we improve our effectiveness and productivity? Ask those on the **FRONTLINES...where we intersect with and serve our customers.**

The Hale Group has completed engagements for clients who wanted real, objective feedback from the front-line practitioners...what's working, what's not and how to do it better. A way to validate how new go-to-market practices are playing out and what adjustments could create maximum forward momentum.

The "Right-Side-Up Organizational View" is about facilitating the flow of relevant information and insights in an organization and using this unbiased, actionable feedback as an opportunity to create meaningful engagement and improve performance and productivity.

THE RIGHT-SIDE-UP ORGANIZATION



SOURCE: THE HALE GROUP

SOME BACKGROUND

The history of “Frontliner Feedback” validates the value of listening to those who do the work. In the book *The Prophet of Management*, the forward by Peter Drucker (a renowned management guru) tells the story of Mary Parker Follett, a thought leader of management science and practices. Her work during the early 1900s helped shape modern management theory taught today. A key element of her philosophy was: if you want to solve problems and be more successful, listen to those who do the work...***the frontline performers.***

Mary Parker Follett’s assertion that **a more inclusive, integrated organization empowers people at all levels of the organization to drive solutions** has never been more relevant than today. Just a few examples:

- ◇ Charles Koch, of Koch Industries fame, recently wrote a book titled: “*Believe in People: Bottom-up Solutions for a Top-Down World*” ...***recognizes those on the frontlines know***
- ◇ Intuit’s operating philosophy: if you want to know how the business is going, what’s working, and what’s not... ***ask the user***
- ◇ Hubert Joly, former turn-around CEO of Best Buy now senior lecturer at Harvard Business School, the key to the turnaround... ***we listen to the frontliners***

However, this is **not** an academic pursuit. The Hale Group has witnessed in practice the real value of frontliner feedback, insights and recommendations in increasing productivity and effectiveness

HOW THE HALE GROUP CAN HELP

While executive leadership team gets feedback from the frontlines in many ways, the frontliners are normally four to six levels removed, and the feedback passes through many hands. The “Telephone Parlor Game” demonstrates how information can change as it passes through. It happens in hierarchical organizations as well.

Engaging frontline performers to improve effectiveness and productivity is a task all leadership teams employ with or without the help of a third party. However, undertaking such an effort with The Hale Group we have seen brings great value. The frontliner panel can be open and candid in their observations and insights with an impartial third party. Also, The Hale Group takes full responsibility for getting the effort completed successfully. Having completed this process (see Appendix A) many times, we know it works and delivers value to the organization.

So, please reach out to us:

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Appendix A

The Hale Group's Frontliner Engagement Process

1	Determine Scope of Frontliner's Work and Select Frontliner Panel Members	<ul style="list-style-type: none">• With leadership, determine the scope of the frontline panel's work• Identify panel candidates and the invitation process to participate• After candidate's acceptance, conduct initial one-on-one interviews with each panelist• The interviews will generate an initial list of "potential areas" for the panel to work on
2	Identify the Priority Areas for Improvement and Develop Recommendations	<ul style="list-style-type: none">• Using the initial list of "potential areas," conduct first group working meeting<ul style="list-style-type: none">◦ Explore the list of "potential areas" and establish the 3-to-5 priority areas◦ Frame / define the priority areas; set agenda for the second group meeting• The Hale Group will capture notes of the meeting(s) and work to be completed before reconvening.• Conduct subsequent meetings until the panel is satisfied with their findings, conclusions and recommendations
3	Prepare Their Report-out and Present to Leadership	<ul style="list-style-type: none">• With panel's findings, conclusions and recommendations in hand, The Hale Group will draft first cut of the "report-out" and disseminate to panel• Subsequent working sessions to refine the "report-out" to assure it reflects the frontliner's views and recommendations• The panel along with The Hale Group will present to the Leadership team.• Solicit and capture leadership's "suggested next steps"