

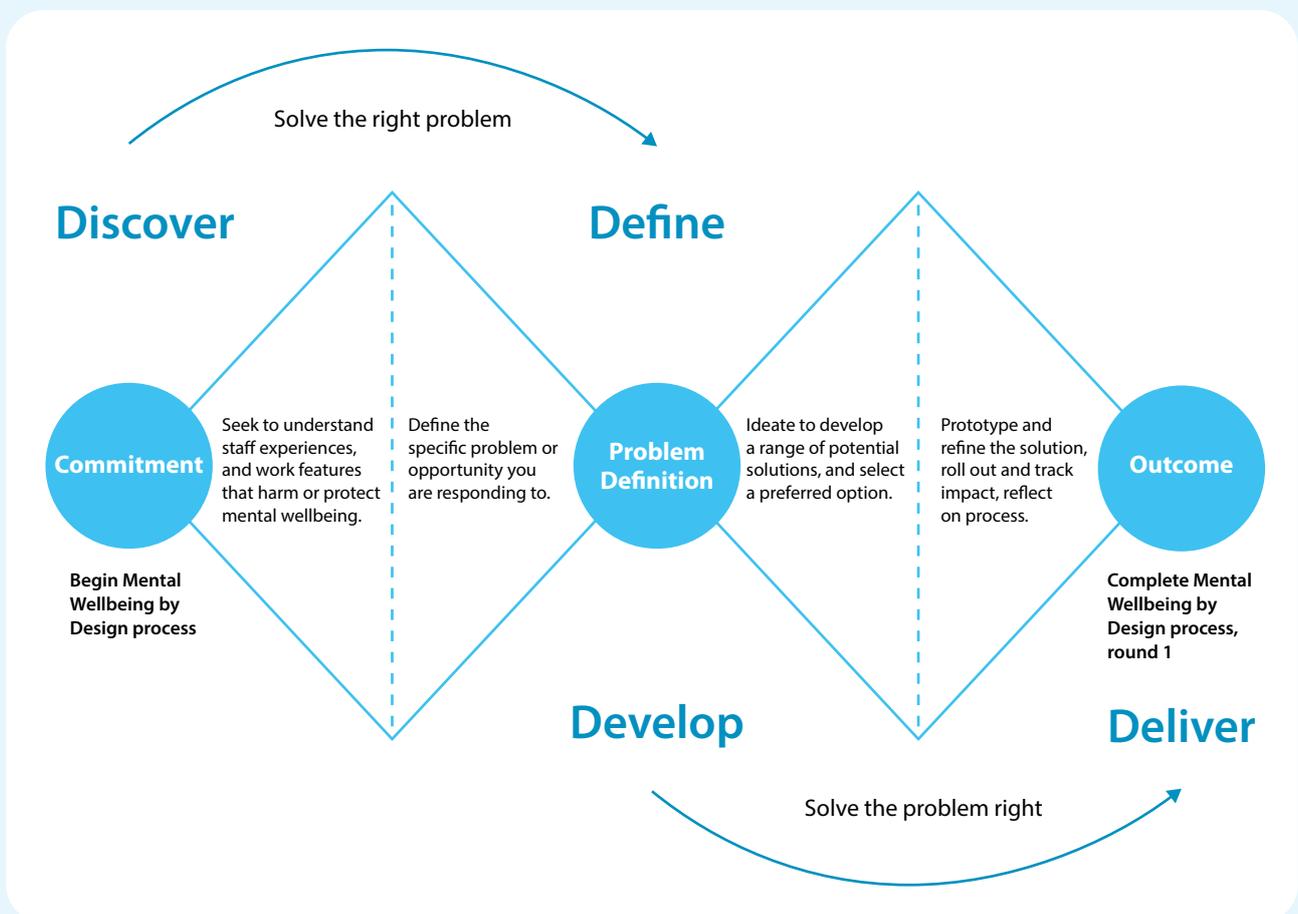
Case study: Frucor Suntory

Redesigning work: A user guide to shift
from surviving to thriving



Frucor Suntory was one of three 'early adopter' organisations, who sought to redesign an aspect of their work in order to improve mental wellbeing amongst staff. Frucor Suntory worked with Renee Jaine from Thrive Lab on this project, part of the Forum's *Redesigning work: A user guide to shift from surviving to thriving*.

This case study explains the steps they went through, and the results achieved.



Discover

Frucor Suntory chose to complete the *Mental Wellbeing by Design* process with their Commercial Health and Safety Committee. The workshop was facilitated by two leads from the central Health, Safety and Wellbeing team, who noted that:

“All participants engaged in courageous, open and honest conversations, discussing and assessing the extent to which various things at work harm or protect mental wellbeing”.

Define

‘Customer relationships’ was the lowest-scoring section on the diagnostic, with an average score of 5/10. There were concerning themes, “from extreme rudeness, threatening behaviour at times, and employees made to feel very vulnerable at times with their interactions.” In particular, challenges were common for sales reps in the On the Go team, who supply beverages to dairies, petrol stations and other convenience stores. Summary notes show “Some customers are absolutely rude and yell at people” and “On the Go industry – really have to have thick skin – some customers are out of control.” The team also noted a lack of face-to-face contact with their team as a challenging feature of the work design.

With this starting point, the Commercial Health and Safety Committee regrouped for a second workshop, led by Renee Jaine from Thrive Lab. This started with a deep dive into the issues – seeking to understand the experience of reps with rude or aggressive customers by mapping out their thoughts, feelings and actions, in the period before, during and after a tense interaction. For context, the group also discussed the perspectives of the customer.

Develop

Within the same workshop, individuals then developed How Might We (HMW) statements, and voted to identify the most useful. Three were selected:

- How Might We build the capability of our reps, so they are prepared for challenging conversations and clients, or experiencing verbal abuse / intimidation?
- How Might We make it clear to customers what is acceptable and unacceptable behaviour?
- How Might We empower reps to share their concerns or negative experiences, so that they feel less anxious and alone?

The group then individually brainstormed a range of ideas for each HMW statement, discussed these, and ranked them on a feasibility / impact matrix. The top three solutions were:

- Providing training around difficult conversations, including information on the supports available and escalation processes
- Expectation setting with customers, including disincentives for bad behaviour
- Creating a space for sales reps to share their experiences and opinions.

An additional deep-dive

Before diving into solution mode, an external consultant conducted additional research – to better understand the rep experience, the initiatives already in place, and any best practices. Key activities at this point were:

- To map the training landscape – understanding the training that reps already receive around customer interaction and de-escalation
- To observe customer interactions – via a ‘ride along’ and follow-up interview with a sales rep who has a number of difficult customers
- To identify best practice – via an interview with the CEO of a pan-industry group, whose members often face incivility from the public.

This deeper dive led to a handful of key insights to support the development of solutions:

- Online training already emphasizes de-escalation, but there are opportunities for more immersive training, including group-based scenario training
- When things go wrong, sales reps already follow a rough escalation process; however, there is no formal escalation pathway
- Reps may verbally set expectations with customers, which can lead to positive change; however, the behaviour expected from customers is not clear
- If issues occur, reps can share their experiences with their manager and their team, but they would like more in-person connection, meaning an in-person debrief would be valuable.

Selecting solutions

Insights from the deep-dive phase were presented back to core members of the Commercial Health and Safety Committee, who agreed to proceed with two solutions:

- Clarify the escalation process
- Introduce regular ‘debrief and upskilling sessions’

Each solution had a range of proposed benefits.

Clarifying the escalation process would mean:

- Staff would know how to react and how to get support
- Customers receive feedback when their behaviour is unacceptable, and they are aware of the consequences (for instance, being transitioned to an online ordering service)
- Customer issues are resolved faster
- Greater consistency across the company, in how matters are dealt with.

Introducing regular ‘debrief and upskilling sessions’ would help to:

- **Upskill** – Scenario-based training helps people to hone their real-world de-escalation skills, and practice different responses
- **Embed** – The sessions would help to embed the escalation process (described above)
- **Raise issues** – Creating a ‘default’ forum would make it more likely that people raise issues, whereas issues may go undetected if the onus is on reps to proactively raise issues with their manager
- **Troubleshoot** – Staff would see the key themes coming through, and they could agree on how to address them in a consistent way
- **Connect and prevent isolation** – A chance to share difficult experiences, which helps to build connection and trust. The face-to-face forum would help to reduce isolation, identified as a risk factor in the diagnostic phase.

↓ Deliver

A prototype of the escalation process was developed by an external consultant, using insights from the ride-along and interview with the sales rep. This process was shown to a range of senior stakeholders and revised, then stress-tested with two frontline sales teams, to see if the process was easy to follow, and if anything needed to be added, subtracted or changed. Feedback was taken on board, to develop the finalised process.

A 'debrief and upskilling workshop' was also piloted, with the same two frontline teams. The workshop involved creating a safe space, sharing stressful experiences, sharing responses and discussing what works, and role playing or visualising these responses, in order to practice them.



To ensure the escalation process and the workshop 'answered' the problem statement, workshop attendees completed a brief survey, based on the How Might We statements. All attendees either agreed, or not, on strongly agreed with the statements:

"The escalation pathway will help me to make it clear to customers what is acceptable and unacceptable behaviour"

"This workshop has built my capability, so that I am better prepared for challenging conversations and clients"

"This workshop has empowered me to share my concerns and negative experiences, meaning I feel less anxious and alone."

In open-ended feedback, people noted that "Addressing these issues in this forum is a great idea, getting people to talk about it, openly and honestly. Really beneficial!" Another manager noted that his team enjoyed the session, learned new tactics, and felt less alone.

Final roll out and reflections

To complete this project, Frucor Suntory agreed to:

- Distribute the finalised escalation process to all sales reps, at a company-wide meeting
- Roll out the 'debrief and upskilling workshop' to all teams
- Establish regular check-ins with sales reps, on the topic of difficult interactions with customers.

In the final reflection, project leads said they'd heard from staff engagement that they needed to do more in the mental wellbeing space.

"To show that we've been acting behind the scenes to improve mental wellbeing, and to close that loop with staff – it's awesome."

About the Forum

The Business Leaders' Health and Safety Forum inspires and supports its members to become more effective leaders on health, safety and wellbeing. The Forum has more than 390 members, who are Chief Executives or Managing Directors of significant New Zealand companies.

Contact us info@forum.org.nz or find out more at: www.forum.org.nz

About Thrive Lab

Renee Jaine is the founder and director of Thrive Lab, a boutique consultancy that helps people and teams to thrive at work. Renee offers diagnostic workshops, programmes to drive change, and individual coaching for mid-career professionals.

Renee draws on her experiences as a behaviour-change and management consultant within the worlds of advertising and big-4 consulting, and her training as a coach. She studied behavioural science and happiness at the London School of Economics, a top-ranked social science institution, where she received an MSc (Distinction) and the Charles Mostyn Lloyd Award for Outstanding Achievement. Renee also has experience around the Board table, as the first female Independent Director for New Zealand Certified Builders.

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