

Special preview for friends and clients of TeleTech

strategy execution made easy

drivers

a story of transformational change

Glenn Price & Terry Reynolds

drivers

a story of transformational change

Today's business leaders are under increased pressure to drive for faster results with fewer resources. Add that to the quest to put your customers at the heart of your business and it can get complicated! Our clients tell us that the hardest part of transforming into a customer-centric business is CX strategy execution. And the hardest part of execution is helping teams engage and adopt new behaviors and a new culture.

Imagine being able to drive for results that will have a lasting benefits for your customers, your organization... and your team. Imagine achieving your goals thanks to a high-performing team that is engaged and energized. Imagine equipping your people with a new mindset to embrace change. Imagine having a clear roadmap of what you need to do next to ensure the successful outcome of your visions or goals.

Vision to Results (VTR) is a strategy execution framework developed by TeleTech Consulting. For over a decade, VTR has been tested and embedded in many of our client organizations worldwide as an effective way for leaders to execute their strategies successfully.

TeleTech is delighted to share with you our new book titled: "Drivers: A Story of Transformational Change" authored by TeleTech Consulting leaders Glenn Price and Terry Reynolds. The book illustrates how leaders and their organizations can execute successful change strategies, that put their customers first by understanding the baseline leadership activities they need to prioritize using TeleTech's proprietary Vision to Results (VTR) framework.

Dr. Joe Folkman, president of Zenger Folkman, global leaders in strength-based leadership, contends in his foreword to the book that the story Glenn and Terry tell is not fiction; rather it is a story they have seen repeated hundreds of times in different organizations, it is very consistent and predictable.

Read the first two FREE chapters for yourself and see if this could be your story too...

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The characters and events in this story are fictitious and any resemblance to reality is merely a happy coincidence.

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Acknowledgements

You might skip past the acknowledgement in a book, ready to dig into the good stuff. But we believe that there are a few words worthy of your attention before the story even begins.

We would like to express our gratitude to the many people who encouraged us to complete this book; to all those who provided support, talked things over, read, wrote, offered comments, allowed us to use their remarks and assisted in the editing, proofreading and design.

Of special note, we wanted to highlight the early development of the Vision to Results model by Jim Robertson. The model has certainly been further refined and tested, but it wouldn't even exist without Jim's original curiosity.

We would also like to take the opportunity to thank the many clients around the world who have been part of our research, strengthened the model, and reaped the benefits of embedding the Vision to Results framework in their organizations. It couldn't have happened without you—the leaders.

Foreword

Dr. Joseph Folkman

I grew up in a small town in the Western United States, in the state of Utah, called Logan. To make extra money and to keep me out of trouble, my mother got me a job working for my Uncle Chester who lived in a smaller town called Providence. My uncle was a farmer. I vividly remember a clear spring day when my uncle asked me to jump in the truck and he drove to a field on the outskirts of town where he grew wheat. At the end of the field I spotted his yellow Caterpillar tractor parked and hooked up to a plow. My uncle turned to me and announced, "You're going to plow!" I was 12 years old, I had driven his other tractor once or twice before but the Caterpillar looked bigger and more powerful. All I could think of was, "Cool, this is going to be fun!"

My uncle was an excellent teacher. He sat down in the tractor seat while I stood behind him and looked over his shoulder. He explained how to start the Caterpillar tractor because the process was a bit different with a diesel. He showed me how to turn the tractor because it did not have a steering wheel, rather two levers that

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controlled each track and he taught me the basics of how to plow. He then plowed up the field, turned around and plowed back down. When we got back to where we started he stopped the tractor and announced, "Now it's your turn." I got in the seat and right before I was ready to move forward my uncle said, "The most important thing about plowing is to plow straight and stay about two inches from the furrow on the left track. I confidently announced, "No problem" and started moving forward. In order to stay two inches away from the furrow I leaned over to the left side of the tractor and watched the track, constantly adjusting the distance between the furrow and the track. When I got to the end of the field my uncle said, "Now, look back and see how you have been doing." What I saw was a wavy furrow not a straight line. My efforts to try and keep the tractor two inches from the furrow caused me to constantly adjust the tractor to the right and then back to the left. After I turned and stopped the tractor, my Uncle Chester said, "I am going to teach you a principle about how to plow straight." He said, "Look down at the end of the field. Do you see that fence post straight in front of us?" I looked down the field and saw the post. He then said, "Aim for the fence post!"

It turns out that when you "Aim for the fence post" you can plow straight. My experience on the tractor is very similar to the experience many employees have in

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organizations. They are trying to do a good job. They want to deliver results. They know how to do their job well. They have been given very specific instructions but they are looking down. They make lots of adjustments but they are still looking down. They are focused on the specifics of doing their job well but they are not focused on the vision. When people are confused about the vision or they are not focused on the vision, the result always suffers.

In my consulting work with organizations, I have told this story hundreds of times along with data, models and processes. At the end of a speech or a workshop I often ask people what they remember. They can sometimes recall that I presented some data. They might know where a model is located in their workbook or where they can refer to a process, but for some strange reason they can repeat the specific details of this story almost word for word. Glenn Price and Terry Reynolds could have given you hundreds of pages full of data, evidence, models and processes; instead, they have provided a compelling story of an organization going through profound change. They include a summary of principles and process at the end of each chapter—but what you will remember when you are in a similar situation, is not the models or the process steps, it is the story. By remembering the story you will recognize how you can move forward and what you can do. I contend that the

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story Glenn and Terry tell is not fiction; it is a story they have seen repeated hundreds of times in different organizations, it is very consistent and predictable. Read the book. Remember the story. Reflect on the principles. You will find they provide you with a fence post at the end of your field.

Part One

Set Direction

Chapter One

Vision

Scott Boylan measured his client's moods as much with his ears as his eyes. Even so, the client didn't need to say a word. Scott just needed the first five seconds after they opened the car door. "They're giving themselves away from the moment they grab the handle," he told his younger drivers. "By the time they've sat down and put on their seat belts, I know whether they're happy about where they've been, or glad to be going where they're going."

Then again, you didn't always need a decade's experience to read a mood. This morning's first passenger snatched at the door and sank into the seat as if he'd like to shut out the world for good. Those moods, Scott knew, called for less, not more.

"Straight to the office, Mr. Dalton?"

"Just drive, Scott," said the man in the tailored suit, pushing a hand through rain-wet hair. "Anywhere except the office."

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Infinity Investments was Scott's biggest account. He and three of his five drivers spent most of their time driving the staff of Infinity from home to the office, from the office to meetings, and home again, but often via a dinner or function. He knew where they all lived, where they went on vacation, and when they went on vacation because it was Scott or one of his drivers who took them to the airport. A father of young children himself, Scott knew which children played tennis and which ones loved to ski. To the children, Scott was a happy sight in his dark suit and black tie. His arrival meant the beginning of vacation adventures. To his clients, he was sometimes the first face they saw on a bad day. Today was obviously one of those days for Alex Dalton.

Scott checked the road over his shoulder and slid the town car away from the curb and into the drizzle. If the CEO of Infinity Investments wanted to put off going into the office with a circuit of the city, Scott wasn't going to ask questions.

In the back, the CEO followed the raindrops on the window as the motion of the car pushed the water in random patterns. Scott glanced at him in the rearview mirror. The CEO was a trim man who was quick to show interest in the world and the people around him. When you added up all the journeys over the years, the two men had talked for hours. They'd discussed the news of the day, the economy, and their children. They'd forged a particular bond over their frustrations with the sports

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teams they had continued to support, despite the let downs and heartbreak each man's team had brought him over the years. Today, however, the CEO's shoulders were high and the usual light was missing from his eyes.

The red lights of the cars in front dragged tracks in the wet road as Scott kept a steady pace in the inside lane. Five minutes passed before the CEO broke the silence.

"I'm sorry, Scott," he said, meeting the driver's eyes in the mirror. "It's been a hell of a week. A hell of a month, actually, but that's no excuse."

"That's all right, Mr. Dalton. You know I'm happy to drive you wherever you want to go, or nowhere at all, even on a morning like this one."

"It's just nice to be moving, frankly," the CEO said, turning back to look through misted window.

"It's been a tough few years for all businesses, Mr. Dalton," said Scott, guessing his passenger wasn't talking about the traffic.

"You know that feeling when your car isn't going anywhere but the cars next to you are?" the man in the back said, meeting Scott's eyes in the mirror.

"When you feel like you're going backwards?"

"Exactly. You feel like you're moving, but you're just standing still. And standing still in business is dangerous. If you're standing still and your competitors are going forward, you might as well be going backward."

"It sounds like a difficult time."

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"I'm sorry again, Scott. I don't mean to be as miserable as this weather or to talk in riddles. But you read the papers... like you say, it's a tough market. I've been there before, but now everything seems to change every 10 minutes. I've got managers telling me all the time their teams are asking where we're going and what we're going to do. At the same time, I've got the board on my back demanding results. I'm not sure they read the papers. It's always the same. Numbers. Quarterly targets. Half-yearly targets. I don't know where they think these numbers are going to come from. Should we go this way? Should we go that way? It's nothing but guesswork. Half my competitors are going one way and the rest are going the other."

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"Infinity's a big company, Mr. Dalton," said Scott. "Surely it's not just you? You must have some help making these calls?"

"My team seems to have more opinions than there are people. Everyone's looking for answers, and I don't have anything more than questions myself. Some days, it feels like it's taking everything I've got just to stop us actually going backward instead of just feeling like we are. If standing still is taking all my energy, I don't know where I'm going to find the energy to get us somewhere else."

"Have I ever told you how I choose a new driver, Mr. Dalton?"

Alex raised an eyebrow and turned away from the blurry shapes through the window. "I don't think you have," he said.

"The interview's probably not what you'd expect," said Scott. "It's certainly not what they are expecting."

Scott had left the army a sergeant. After 20 years' service, he'd kept the haircut and upright bearing but had decided he wouldn't be taking orders anymore. Looking for a business that wouldn't keep him locked in an office, he had bought a car and applied for the right permits. With hard work—something else he'd taken from the army—and a commitment to service, his business had grown to three cars and five drivers working in shifts. Scott was a natural leader and his drivers liked working for him so driver turnover was low. When he

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did have to hire a new driver, he was meticulous in the selection.

"I have to be careful," he said to his passenger. "My business is in their hands every time they pick someone up. I can't be there when they're on a job. If they don't give our clients the sort of service I want to be known for, they could lose me that client for good, and I might not even know why. People often prefer to say nothing when they don't like something and they just find another company. So I'm looking for more than a clean driving record and the right number of years of experience. I'm hiring a person, not a checklist of qualifications or milestones."

"A literal collection of milestones in your case," said Alex, smiling for the first time that morning.

"That's right," said Scott, catching his client's change of mood in his mirror, "and those milestones are passed in the driver seat. But I'm giving the person I hire responsibility for growing my business. I need them to sell the experience because clients who enjoy travelling with us tell their colleagues and friends. That's how the business has grown and that's why my drivers all start in the back seat."

Scott explained that after going through the formalities in his office, he'd take the potential new driver outside to the firm's newest town car and tell them it was time to go for a drive. Invariably, the driver would start for the driver's door before they noticed

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Scott holding open the rear door for them. "Where to?" he'd ask.

"The thing is, Mr. Dalton, there's more to driving than just driving." He paused for a moment while he concentrated on merging with a line of slow-moving traffic. "You can tell a great deal about a person from where they want to go. Sure, it takes some coaxing. They're drivers; they're used to doing the asking. But once they realize that I'm serious, they give it some thought. They have to. It's not a metaphor: we can't go anywhere until they've picked a destination, and that tells me a lot about them."

"What can you tell about someone from that?" asked Alex, shifting to a more upright position in his seat.

"Some of them want to drive around the sights or head for the upmarket parts of town, seeing it all from the back seat of a smart car for a change. They tend to be the ambitious ones. Others want to drive past their kids' schools or their mum's house. They're the ones who work to give their families everything they need. We're all doing the same job but we're not doing it for the same reasons."

While Scott chauffeured a potential driver, he told Alex, he would explain to them his business philosophy.

"The speech is always the same. I tell them driving's our business, but getting the client from A to B is only the start. If you want repeat business, you need to pay attention not just to the way you're driving but the route

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you're going to take to get them there. Sometimes it's easy, but sometimes you get the best result from a less obvious route. The drivers who get and keep the sort of clients I'm aiming for are the ones who know driving is just the start." Scott had found an open stretch of road and the car was moving again. "But who am I telling, Mr. Dalton? You've been with me since it was just me driving. There are thousands of drivers for hire in this city. Obviously, they all know how to drive, and for the most part they all know how to get from A to B. If my business were just about being able to drive a car around the city, it would be no different from a hundred other companies, maybe a thousand. My business grew because I knew being successful in this game wasn't going to be about being a better driver; it was going to be about giving clients a better journey."

In the back seat, Alex had his chin in his right hand and was nodding in agreement. A light had come into his eyes.

"People talk about their drivers all the time," the driver continued. "Mostly, they talk about them to complain—too chatty, too opinionated, and too heavy on the brakes. I wanted to build a company people talked about because we got everything just right. We're there on time; we've already thought about the fastest route; and we'll let you know if we're expecting any problems on the way. We talk, if the client would like to chat, and we keep quiet when it looks like they want time

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to think. And people do talk about us. Almost all my business comes from people recommending us and it's not our driving they're talking about, it's the journey."

Scott heard the rustle of the CEO's suit on the leather upholstery as Alex shifted in the backseat.

"Scott, you're a wise man," said Alex, leaning forward to touch him on the shoulder. "I'm ready to go to the office now, but if you'll excuse me, I've got a call to make on the way."

Alex pulled his phone from his pocket. "Kirsty," he said to his assistant on the other end, "I want the leadership team in the conference room as soon as they come in."

It seemed to Heather Wong that the boss almost bounced into the conference room. Heather had begun her career in her native Hong Kong, where she had honed her skills reading body language because so much was often left unspoken. She was seldom wrong, especially about Alex, whose open management style was one of the things she most liked about him. As Alex crossed the room, there was more length in his stride than she'd seen for a long time. She chose to take it as a good sign. In other jobs, unexpected calls to meeting rooms first thing in the morning hadn't signaled good things, especially for the head of HR. Infinity Investments had been sailing through some choppy waters, but this morning the captain of the ship didn't seem too worried. He seemed—could she be right—excited?

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Alex caught the eye of each of his team as he walked the length of the conference table. Heather was the first person he saw. She sat in her usual seat—nearest the door, with her back to the conference room's impressive view of the city, a tall waxed paper cup of coffee on the wide boardroom table in front of her. Heather was respected by all for her ability to balance the needs of the business with the needs of the individuals who worked for it. Her counsel was often sought and was always available for the price of a coffee.

Next to her was Kathryn Chivers, a Hermes scarf adding a splash of color to her conservative suit. The communications director was the oldest of the group. Her reputation was for sharp insight and discretion.

Michael Stockley, Infinity's sales director, sat a few seats apart. A bull-necked man with close cropped hair, Michael had started on the trading floor back when greed was good and worked his way to the executive level on the back of exceptional numbers and dogged determination. He looked up from his iPhone to catch Alex's eye as he passed. The newest member of the team, his undiminished enthusiasm for meeting his sales targets led to the occasional tense conversations with anyone he felt was getting in the sales team's way.

The team rippled forward almost imperceptibly as Alex passed. He knew he had their attention. The only member of the team not to move was Lee Washington, the CIO. He was visiting one of Infinity's offshore data

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facilities, so hadn't been able to make the impromptu meeting in person. Instead, he was represented by a three-legged Polycom unit. Because no one had spoken, he didn't know the CEO had arrived or seen for himself the glint in his boss's eye.

Arriving at the whiteboard, Alex turned his back to the room and began to write. He could sense those in the room craning their necks behind him, straining for the first inkling of what the impromptu meeting was about. He heard Michael put his phone down on the table. When Alex turned around, there were three questions behind him on the board: Who are we? Why are we here? What do we believe?

Alex looked down the table, smiled, and spread his hands expectantly. For a moment, all they could hear was the sound of the rain tapping on the windows. Alex looked at each of them, saying nothing. No one spoke.

"Lee, are you there?" Alex asked the speakerphone on the table.

"Yes, Alex," the CIO replied.

"Okay, I've just written three questions on the board. Answering them is the sole agenda item for this meeting. They're: Who are we? Why are we here? And what do we believe? Anyone?"

"Well, my name's Michael," said the sales director eventually. "I'm here to make money, and I believe I should be out there now making some calls to do it."

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The joke fell flat, although he had earned the silent appreciation of his colleagues for being the first to speak.

"That's good, Michael," said Alex, "but, I mean it. They're important questions. Without answers, we can't really know what we're trying to achieve. We've never set aside time to ask them and, if we answered them for ourselves, we've never talked about it as a group. I've made a mistake in not making sure we set aside some time to think about these things as a team. What is this business for? What is our purpose? And why are we the right ones to be pursuing it, if indeed we are?"

"Do you mean, 'If indeed we are pursuing that purpose'? Or are you saying we are pursuing it, but we might not be the right people?" asked Kathryn, a red teardrop earring swinging like a pendulum as she tilted her head, looking again at the three questions on the board.

At the other end of the line, Lee stopped absent-mindedly replying to emails and started paying closer attention to the meeting.

"Either. Both," said Alex. "And, if we are the right ones to be doing it, what do we need to change to do it right? At the same time, if someone told us we had to make changes, what would we say we were definitely keeping because it was truly working? What is it that we believe in as a group that has got us this far and that might get us further?"

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"I find these sort of existential questions are generally best left to HR," said Kathryn swiveling her chair to face Heather, an arch twinkle in her eyes.

"Sure. Push the big questions to HR. We can handle it," said Heather, turning away from Kathryn. She unclenched her jaw as she said to Alex, "Maybe you need to help us out a bit, Alex. It's still early and I'd have ordered a bigger coffee if I knew I'd be tackling the meaning of life today." She took a sip of her coffee, looking expectantly over the rim at the CEO.

"Fair enough, Heather," said Alex, pulling out the chair at the head of the table and sitting down. "The questions are big, but not quite that big. If we get on to the



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meaning of life, I'll get Kirsty to order you an extra big coffee. For now, I'm talking about us, Infinity. It was a nice swerve by Kathryn, but maybe she's right. You're at least in the best position to answer the 'who' questions. You know more about our people than anyone. If we look at the company, what sort of team have we built? Do you think it's the right sort? Are we all like Michael—here mainly for the money? Or is there something else that brings us to work?"

"Not to state the obvious and, loath as I am to agree with Michael under most circumstances, the pay is good and Infinity has a pedigree," said Heather. "There is a money element, and we're not a bad name to have on a resume."

"We're in financial services. Of course it's about the money," said Michael, his neck flushing red. "We're a good name to have on your resume when you go for another job, one that's offering more money. If you're in this business of all businesses and it doesn't come back to money for you, you're in the wrong place."

"Sure, but we don't pay more than anyone else and there are plenty of good names out there," said Alex. "Do people just end up here because it's where the chips fell? Or, as Michael says, because it's a rung on the ladder to the next place?"

There was a silence in the room.

"I know why I came, if that helps," said Kathryn, breaking the tension. "You know where I was before and

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you know their reputation. When you work there, work is what you do. It was like Eisner said at Disney, 'If you don't come in on Saturday, don't bother coming in on Sunday.' Work was all you'd do because you didn't have time for anything else. I heard Infinity was different, and I wanted to try it."

"And what did you find?" asked Alex.

"I found I stayed," said Kathryn. "I liked it. I still like it. It amazed me that the quality of the work was just as good and so were the results. I wish I'd come sooner."

There were nods around the table and a "me, too" from Lee on the speakerphone.

"That's also true for a lot of our people," said Heather, acknowledging the nods. "They've done the other thing. They thought working 70- or 80-hour weeks was the way to get ahead. If you left before midnight and weren't back again before 7 a.m., you weren't serious. That kind of thing. They come here when they want to see if there really can be more to life than work, without giving up doing what they love to do."

"Infinity. Where tree huggers look after your investments," said Michael, "but only until 5 pm. No wonder we're in trouble." He reached for his phone again.

"You don't need to be a tree hugger to want to have more to life than an inbox that never empties, no matter how much time you spend on it," said Kathryn, pointing

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at the phone in Michael's hand. "Believe it or not, there are people who think it's possible to do a great job and still have horizons wider than a couple of 27-inch monitors, the bar across the road, and a home they never see in the daylight."

"What's wrong with the bar across the road?" said Michael, looking genuinely puzzled. "It's the best beer in the city."

"I think that's right," said Heather, ignoring him and looking from Kathryn to Alex. "We don't put it in the job ads, but people ask me about it when they come for an interview. They've heard we're not the same."

"And you, Michael?" said Alex. "Seriously, is that why you're here? For the money and the adjacency to a decent microbrewery?"

"Are you asking me if there's more to life than selling investments, Alex? Because you know there isn't. Not for me."

"Come on, Michael," said Lee laughing down the telephone line. "We know you're a master of the universe, but even you aren't the Wolf of Wall Street."

Outside the drizzle had stopped and the sun had begun to burn through the clouds.

"All right, you got me. I did come here because I'd had enough. I love my work, but there's more to me than that. One day, I'll show you my watercolors, Kathryn," he added, to general laughter. He put his phone back on the polished wood and slid it away from

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him. "You all know I've got a family and of course I know I've got a family, but I didn't properly realize that for a long time, if I'm being honest. I missed a few too many school plays before I got the message. I do love what I do, but after a while I wanted to see if it was possible to have more. I would not have said this before, but that's why I called when I heard you were looking for a new sales director."

"Thank you, Michael," said Alex.

"Now that I've gushed," said Michael, "Alex, what do you mean 'What's our purpose'? I don't want to come over all Jordan Belfort again, but it's not complicated, is it? We're here to sell investments to anyone who'll buy them."

"Family man status aside, you're not what you'd call a layered person, are you Michael?" said Kathryn, putting her head to one side and looking at him quizzically.

"I was reminded, on the way to work this morning, that it's a mistake to take a business at face value. What we do has to be more than just selling investments," said Alex. "Hotels don't just sell rooms with beds in them. They sell experiences. You choose one hotel over another for a number of reasons, but part of it is the experience you'll get and part of it is knowing what that hotel values. This one is about exceptional service. That one is about comfort or efficiency or convenience or expense or whatever. Boiling it down the

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way you are, Michael, there's nothing to choose between one hotel and another. At their most basic, they're all collections of rooms with beds. On that basis, in our business, we're all just firms with investment products. You'd only ever choose one on price."

"You're right," said Lee, who was at that moment actually in a hotel he'd chosen because it always remembered his preferences, regardless of where he was in the world. "If you said 'Hyatt' to me or 'Hilton,'" The Plaza' or 'The Savoy', I'd instantly have an image in my mind. I have an idea what they stand for, and why I'd choose one and not the other."

"Assuming you had the money to make a choice," said Michael.

"Yes, Michael, money is part of it," said Kathryn. "No one is disagreeing with you about that. But Alex is right. We've let ourselves become indistinguishable from everyone else. We've forgotten why we're in this business and who we're in it for. And if we're the same as everyone else, then there's no point in our being here."

"And if we can't see any point in our being here ourselves, why on earth would a client choose us?" added Heather.

"Look, I do take your point. I'm not a complete idiot. I just think sometimes you forget what makes everything else possible around here," said Michael, a blade of annoyance coming into his voice. "If we think we're attracting people to work here because we're so different,

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why don't we offer clients the same thing we offer our own people?"

"What do you mean?" asked Alex.

"Offer them a life-changing investment."

"You mean only offer them high-risk investments?" asked Kathryn.

"No, not high-risk, not necessarily," said Michael. "A big return would change some people's lives, but so would a big loss. An investment that brought financial peace-of-mind would change some people's lives. For others, it would be knowing they could put a child through university. What changes one person's life might be different from what changes another's."

"So, the thing would be getting to know why the client is investing, and putting them into investments that could really get them there," said Kathryn, furrowing her brow and nodding slowly. "I like it."

"Infinity. Life-changing investments. It works," said Alex.

"It works for clients, and it works for everyone on the team," said Heather. "We make an investment in the people who work here. We pay what the rest of the industry pays, but we trust people to do great work in a reasonable time. We don't treat them like we pay by the hour and we've bought all the hours in their day."

"I agree," said Lee's voice from the speaker. In his hotel room, he stood up walked over to the window. It was sunny outside, approaching lunchtime. On the

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street below, he could make out people bustling from one place to another. They looked so similar from up here, but every one of them represented a history, a family, and a collection of individual hopes. "If we think about this from the customer's point of view, it's exactly why they invest. They are looking for something more. Money is an end in itself for some people." Michael felt a few eyes turn to him. "But I'd say, for most people, it's a means to an end. There's something they want it for. We have a lot of data on our existing customers. We can start asking some really smart questions about what 'life changing' might look like for different groups."

"What I really like about it is that it's big," said Alex. "You can imagine people rallying to a vision like that, but it's still possible to see how you, as an individual employee, fit into making that happen. It's more than a slogan. It's definitely a destination you can aim for. So what would you say were the beliefs that's got us this far—even if we didn't realize those beliefs were what was holding us together?" said Alex.

"A belief in people," said Heather, leaning forward. "We believe that people don't need to be pushed to the limit to do a good job. In fact, they probably don't do a good job if they're always operating at their limit."

"Also, we believe we do it differently," said Kathryn. "We believe it is possible to stand out and be different in this industry; that we're not all the same."

VISION

"And we believe there's a value to that difference," chimed in Lee.

"I believe we've fitted a missing piece," said Alex, holding out a hand and chopping the air to punctuate his thoughts. "We know why we're here, we know why people want to work here, and we know why our customers are going to join us. Because we're not just about investments."

Around the table, his team leaned back in their chairs.

"It's been a good morning's work, and I would give you the rest of the day off, but we've got lives to change. And now that we know where Infinity's going, we need to talk about how we're going to get there. I'm not unrealistic. I know you've all got projects on and full schedules, so I'm not going to ask you to clear your diaries and stay here to talk about it today."

"That's a relief," said Michael. "I've got four client meetings today."

"Like I say, I'm not unrealistic," said Alex. "So, we'll say, tomorrow morning at the same time. I shall look forward to your ideas."

A shaft of sunlight came through the window behind Heather, catching her cup as she finished the last of her coffee.

Vision to Results Insights

They don't know it yet, but the leadership team at Infinity has stumbled onto the Vision to Results (VTR) framework for ensuring business success by sharpening leadership focus and aligning strategy, developing competence, and inspiring behavioral change. In reality, the framework has taken years to develop and it continues to evolve as we partner with clients—including many household names—to deliver amazing results from working through Vision to Results.

At the end of each chapter of Infinity Investment's story, we will be pulling out the VTR lessons from the story. You'll see that none of it is complicated; indeed, some of it seems blindingly obvious—when it's pointed out. It's entirely possible that a company might stumble onto VTR as a winning formula, but our experience has been that few companies have all the elements in place and even fewer have them all working smoothly at the same time, and certainly not by luck.

As the name of the model suggests, having a vision is especially important.

The importance of having a vision was one of several important reminders and insights Alex had in this chapter:

1. Your vision is your destination, so without a vision you're going nowhere.
2. A leader needs to set aside time to think about that vision and should think big: whether the vision is aspirational or conditional, a poverty of ambition will not inspire anyone.
3. The vision needs a concrete element or it just becomes a marketing tagline, not a destination people can be motivated to reach. Infinity is in a position to really change people's lives. Leaders and team members can use the vision as a compass or litmus test when deciding whether a decision or proposed action is a good idea for the organization. In contrast, you couldn't run all your choices through a marketing tagline like "Just Do It," even if it would simplify the decision making considerably.

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4. The vision needs to authentically fit with the values of the organization because you need your people to want to achieve it, which they won't if it goes against what they believe in.
5. Finally and all importantly, the vision has to represent a destination for the organization that your customers are interested in and buy into, so leaders need to look at the vision through customers' eyes before deciding on it.

* * *

Chapter Two

Strategy

The weather was not the only thing that had brightened by the evening. It was a visibly happier Alex who slid into the back of Scott's car.

"Home, Mr. Dalton?"

"Yes, please, Scott. And thank you," said Alex, putting a finger over the knot of his tie and working it down.

"I haven't got you there yet, Mr. Dalton, but thanks in advance is always appreciated."

"Well then, thank you for that in advance, Scott, but I really meant for what you said this morning about knowing who we are and why we're doing what we're doing. It really got the ball rolling for us. For the first time in months, I know where we're going. Of course, all we have to decide next is what we specifically need to do and how we're going to get there, but that's tomorrow's problem. At least we're not going to be standing still anymore."

DRIVERS

"In that case, do you mind if I ask you a question?" Scott asked, flicking on his indicator to pull the town car into the outside lane.

"The way I feel right now, Scott, you can ask me anything you like."

"Do you know where you are?"

"Well, right now I know exactly where I am: on my way home to unscrew the top off whatever the last thing I bought myself in duty free was. And if the children will let me, I might even treat myself to last night's game."

"If that's what you're going to watch, you might not be in such a good mood for long," said Scott.

"No spoilers please, Scott. I don't care how badly they messed it up last night. I'm in too good a mood. I shall drink to their very good health, whatever happened."

"I meant: Do you know where you are in terms of you saying you knew how you're going to get where you're going?"

"Ah, well, that's another question altogether. I can't go into too much detail, although you'll have heard your fair share of the inner workings of Infinity driving us from meeting to meeting. In fact, in some ways, you'll know more about the company than I do, or certainly different things, some of which you'd be far too discreet to tell me, I suppose?"

"That's true, Mr. Dalton. More than my job's worth to talk about what I hear coming from the back seat, as you well know."

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"Anyway, you'll know things haven't been plain sailing. I know I've got good people. I was reminded of that not half an hour after you dropped me off. But sometimes, it seems like I've got a team full of good players who don't where the goalposts are. Or, more accurately, they've all got their own ideas of where the goalposts are, so everyone's kicking in different directions. Everyone's tired from running around hard, but there's not been a lot of scoring lately. The team is still all over the place, even on the occasions when we agree where the goalposts are. So, in answer to your question, where we are would depend on whom you asked."

"With respect, Mr. Dalton, it sounds like it might not matter where you put the goalposts then."

"What do you mean, Scott?"

"Well, it's one thing to agree on where you're going, and that sounds great, but it's pretty hard to get somewhere if you don't know where you're starting from. I'm not saying what I do is as complicated as what you do, but if there's one thing I know a lot about it's getting somewhere."

"No arguing with you there, Scott. You always know where you're going," agreed Alex.

"That's definitely the easy part for me. I don't need to decide where I'm going; that's the client's job. But they do expect me to work out how to get there, even when they have opinions about it—and you and I both know people always have opinions about driving routes.

DRIVERS

Luckily for me, we've got GPS now. Like I told you this morning, I've still got to make decisions, though. The GPS will give me options and even add in traffic information. That all helps, as does a little local knowledge."

"It's all true, Scott, but unfortunately there's no GPS for business, whatever the Economist and the rest of the business press like to suggest. I wish there were."

"True enough, Mr. Dalton, but my point is that the GPS is helpless without two pieces of information. From what you're telling me, you've only got one. If there was such a thing as a GPS for business, you'd be typing in where you want to go and the GPS would be doing absolutely nothing for you."

"I think I'd want to return it in that case, Scott. I don't expect a magical business GPS would've been cheap."

"Probably not, Mr. Dalton, probably not, except this one isn't broken. It can't possibly tell you how to get to your destination if you can't tell it where you are right now. The starting point is the second piece of information it needs. We forget about that part because we get in the car switch on the engine, and the GPS automatically starts asking itself where it is before we get around to telling it where we want to go. The GPS knows it needs that information before it does anything else, so it never forgets to ask. But if your team hasn't agreed until today on where it's trying to kick the ball, can you be

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sure they've all asked themselves where they are starting from?

"I'm beginning to think, Scott, that we've wasted a lot of car journeys talking about sport and the weather," said Alex, sitting back in the seat and folding his arms.

The following morning saw Alex's team gathered again in the boardroom. The thousand mirrored windows of surrounding office blocks reflected white clouds and blue sky back into the conference room. The senior executives were clustered at the end of the table nearest the whiteboard. Heather had her coffee—an especially large one, Alex noticed. Kathryn, not one for a disposable cup, had brought in a Japanese teapot and a single discreet bowl. They all had notebooks in front of them. Michael, the most visual thinker of the group, had a few pens in different colors. And even he, usually the most eager to get through any meeting and back to work, had brought a bottle of water.

Alex was uncapping a marker pen when the door opened again and Lee walked in, wheeling a small suitcase behind him.

"I cut short my trip," he said, looking at Alex as he took a seat next to Heather. "This is more important."

Alex nodded and turned back to the whiteboard. On the right-hand side, he wrote the words "Life-

changing investments." On the left of the board, he drew a question mark. On the opposite side, he drew a large cross. He drew an arrow across the board—from the question mark to the cross.

"Yesterday," he said, "we agreed we were going to stand out from the crowd by not just being any investment house. We asked what brings us together and what our purpose is as a company. The answers to those questions told us we want to become the investment house that changes lives. Today, we need to think about how we're going to get there. But we can't do that until we've answered one more question."

He took off the jacket of his suit and arranged it over the back of his chair at the head of the table. Turning back to the board, he pointed the marker pen at the cross on the right-hand side of the board. "This is where we're going. X marks the spot," he said, writing the words 'life-changing investments' under the cross.

"The question," he continued, circling the question mark in red, "is: Where are we now? If we asked our clients or our own people about us, none of them would say we're changing their lives. Getting to that point is going to be a journey, but we can't even start making plans until we're clear where we're starting from."

"When it comes to our people," said Heather, "I don't agree that we're not there already." She furrowed her brow, looking first at Michael and then at Kathryn. "At least two of the people in this room came here

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precisely because we offered them something better. From an employment perspective, I'd say we are already offering what we want to offer and people know about it. Isn't that what we talked about yesterday?"

"That's not entirely true," said Kathryn. "I'd heard from friends that things at Infinity were different, which was why I looked into it. There was no point in leaving the last place if that weren't true, so I made a point of asking Alex about it in the first interview. But I'm not sure I would have been bold enough to ask questions like that earlier in my career."

"Kathryn's right," said Michael, "which feels strange and unusual to say." Kathryn curled her lip at him and shook her head. "I felt the same as she did and I wasn't afraid to ask up front either, but I'm not sure my sales guys would feel comfortable asking in an interview if this is a nine-to-five place. That's the sort of question that would knock you out of the running in most places."

"Michael, you'd knock someone out of the running here if they asked that question," said Kathryn.

"True, but it's still better than other places," said Michael. "I've worked in jobs where you'd tell an interviewer you didn't have kids at all, let alone say that not only did you have kids but you expected to be able to see them occasionally."

"That's what the wife's for?" said Heather, raising an eyebrow.

DRIVERS

"I'm just saying," said Michael, throwing up his hands and falling silent.

"If we're setting ourselves up as different, I'd say we've got to back it up," Alex cut in. "Word of mouth is powerful, but unless something is locked into your contract, it's not a promise and you're taking a risk that things aren't that way at all. If being a better employer is something we're serious about offering, then we need to offer it explicitly. We need to make a commitment. Heather, we're part of the way there, but I want you to think about how we're going to make a promise to staff that working here will be life-changing."

"I'll talk to my team, and come up with some ideas for how we're going to build it into our employee value proposition. If it's going to be explicit, we need to have it in all the messages that potential employees might see, whether it's our LinkedIn page or in what our external recruiters are telling candidates when we start hiring again. One thing's for sure, we won't have any competitors making similar promises."

"I'd like to work with you on that," said Kathryn. "What we're communicating to potential new employees will need to sound the same as what we're saying to everyone else. It's somewhere Communications and HR should definitely be working together."

"But we need some substance to be working from," said Lee. Like Michael, Lee had worked his way to the

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executive team from the bottom, starting his career by coding banking software. Alex's reminder that you couldn't make plans to get somewhere unless you knew exactly where you were starting from was second nature to a computer programmer. "We can't just guess how people feel about working here. As Michael and Kathryn said, not everyone is going to have spoken honestly about what they think when they came on board and we wouldn't have recorded it even if they had."

"It's a good point, Lee," said Heather. "We need to get a sense of what we're doing well and what we could be doing better so we know what we can promise based on what we have already and what we need to work on."

"We could take a survey?" Kathryn suggested.

"There are some good tools out there," said Lee. "I'll have one of my guys talk to you about what's on offer and how we can help you analyze the results."

"If you three can work on that together, that would be perfect," said Alex. "Which leaves you, Michael. How do we go about letting our clients know we're in the business of changing lives?"

"I haven't talked to my team yet, but I thought about this hard last night," said Michael. "It's a new focus for us. It's not how we've thought about products and positioned them in the past. I realized we needed a radical rethink. We need to look at every product from

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the bottom up, to see if it fits. If it doesn't, we'll see whether it can be reworked to fit. I can see more than a dozen products we can retire straight away, and I've got a few ideas for new ones, including an idea for an ethical fund."

"Retiring products that don't fit the vision is a good idea," said Alex. "Change isn't only about what we're going to start doing differently. We do have to think about what we're going to stop doing as well. But when you say an ethical fund, what do you have in mind?"

"We want to change people's lives, so why not have a fund that doesn't invest in guns or any kind of weapons? Maybe one that doesn't give money to projects that displace people from their homes or whatever?" said Michael.

"That's all very noble," said Kathryn, "but it's not exactly original. Investors have plenty of choices when it comes to ethical investments."

"I know that," said Michael, snapping his head towards the head of communications. "I'd need to look at what our competitors are doing to make sure ours is different. There will be a way to make it stand out. Maybe we could focus on investing in companies that are developing products with the potential to improve lives. Maybe we could find a way for customers to vote on what we invest in."

"A Kickstarter for an ethical fund?" said Lee.

"Something like that," said Michael. "Or at least

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a facility to give up-votes to investment choices within a fund."

"You're right that it's not original, Kathryn," said Alex, "but I don't think that's what's really wrong with it. We have to be clear when we say 'life-changing' whose life it is that we're changing. What we agreed yesterday is that we're about life-changing investments for our clients and everyone who works here. That doesn't mean we can't have an ethical fund, and I'd like to think we're already pretty careful about not putting our clients' investments where they'll ruin anyone's life. But if we're going to rally Infinity around a vision, it has to be crystal clear. First and foremost, I want our clients to know it's in their lives where we'll make the biggest difference. That's the primary lens we should look through when making decisions. Then, I want the people who choose to work here to know that working here will change their lives. If we can be a positive force in anyone else's life, that's fantastic, but it's not the focus."

"Point taken," said Michael. "I'll sit down with the team and work up some of my ideas, and see what they can come up with too. For our part, we know we absolutely have to have a portfolio that fits the vision."

"There's someone else you should sit down with, though," said Alex.

"Who?" said Michael.

"Our clients. We need to make sure we've got products

DRIVERS

that match our vision, but that's no good if they don't meet the clients' needs as well."

"I can have my team look at the data," said Lee. "We know a lot about our customers and what they want already. Just off the top of my head we've got web analytics and call center records to start with. We've had lots of feedback already; we just haven't been looking at it thoroughly."

"I think we need to start getting this down," said Kathryn.

"What a surprise, the head of communications wants to write something down," said Michael. Heather laughed in spite of herself. She didn't usually like to encourage Michael when he baited other members of the team.

"Now, what could a salesman have against keeping things honest?" said Kathryn, and even Michael had to smile. "I'm not talking about anything over-engineered, just a plan on a page so we're clear on who's doing what."

"That's a great idea, Kathryn," said Alex. "Before we start, can I say what a breath of fresh air it is that we're all in agreement about this? We're not going to be able to do this if we're going off in different directions. Let's get down on paper what we're going to do after this meeting. Michael?"

"Top of my list is making sure our existing products fit the vision of life-changing investments. Next is coming

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up with some new funds, ones that really stand out. And making sure everything we offer meets client needs."

"What do you see being the most important things to do there?" asked Alex.

"For the existing products, it's a review. I'll divide the products among the team and ask them to hold each one up to the light. Does it have the potential to make life better for the person who invests in it? For the new products, my team needs to have a brainstorming session, and we need to check what we come up with against what our competitors have. The new products really need to stand out if we're going to put our flag in the ground."

"What about the clients?" asked Alex.

"I've got other client meetings before the end of the week. The team has more. I'll work with them to come up with some questions to ask. If I'm not on a sales call, the team will give me feedback and I'll make a point of going to see our top five clients specifically on this point. I think they'll appreciate being asked, aside from anything else."

"That's good," said Alex. "What about you, Heather?"

"Same as Michael. I'm going to look through all our recruitment material to make sure it's in line with the vision. I'm also going to speak to our recruitment agencies to make sure I know exactly how we're seen in the market. This recruitment freeze won't last forever.

DRIVERS

I want them to be in the picture when we're ready to start hiring again, so we get the right people in."

"We'll be working on the messages together," said Kathryn, "but first we're going to survey the company so we're basing what we do on facts, not assumptions."

"In IT, we'll be supporting both streams by helping them get the best data for making decisions—or at least for testing theories," said Lee.

"All right," said Alex. "The priority is customers. I want you to test everything you do against what's going to be best for them. It's because of customers that I'm taking the employee angle to be a priority, too. People who feel their lives have been changed by Infinity are going to be much more open to the idea that we can do it for our customers. They'll be looking for new ways to do it. And to keep ourselves honest, especially our sales team, Michael, how will we know what we're doing is working?" He smiled at Michael, who was getting a mock consoling back pat from Kathryn.

"As it happens, I have no problem with honesty and being held to account," Michael said. "Sales is one of the most transparent parts of any business. Either you're selling or you're not. There's nowhere to hide. In this case, I'd say we'll know we've got our side of things on track when we can come to you with clear recommendations for products to scrap. And we'll have the outline of products built with the vision and our

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customers in mind—products you can look at and say with confidence there's nothing like them on the market."

"For our part," said Heather, "we'll know we're on track when we're able to come back to you with a status report on what needs to be changed in our recruitment messages, based on what we've learned from recruiters and new hires. We'll also have the survey results of where we are now in relation to the promise of a life-changing employment. With that, we'll have recommendations on how to get from there to a place where we're living up to the vision."

"We've come a long way in a couple of days," said Alex. "I think it's definitely time to bring your teams into the picture. But I don't want you to come back just to me with recommendations. As a team, we have to stand by what we've decided. So, it's right that we present what we find back to this group for discussion. You've got a week, then we meet again."

Vision to Results Insights

The leadership team is starting to plot a strategy to take the organization in the direction of its vision of making life-changing investments for clients and in employees. They have recognized you can't plan a route to a destination unless you know the starting point as well as the end point.

Coming up with a strategy to achieve a vision requires:

1. A clear and honest view of reality—where you stand now. Whenever you can, it's better to make decisions based on facts and data rather than assumptions. For Alex and his team, this will include an employee survey and informatics about clients taken from their behavior on the website and their feedback to Infinity's call center.
2. There will almost always be too many things you can do. It's important to prioritize action. Infinity's executive team could be doing any number of things toward the vision but they leave the meeting clear on what's most important.

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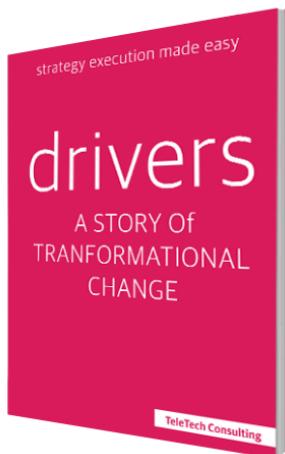
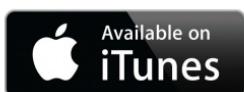
3. Alex's leadership team is not a cohesive unit, likely the result of a sustained period without clear direction. When people don't know what they're supposed to be doing, they often turn on each other. At least they're agreed that things aren't working the way they are and they've fallen in behind the vision. If they weren't agreed on the vision, getting anywhere at all would be difficult and would require some level of intervention or executive development.
4. Leaders should never create strategy for strategy's sake. Strategy should be created for the customer's sake. Alex has been clear with his team that everything they present to him from now on needs to have been thought through in terms of the benefit to the customer.
5. The focus areas agreed on have been written down and they're unambiguous. At the team's next meeting, there will be no room for anyone to say they didn't know their exact responsibilities. In our experience, limiting strategy to the key three to five core focal areas helps achieve this goal.

* * *

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