

ROUNDTABLES WITH PHIL



Roundtable Report: Developing Leadership Skills

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Abstract

Recently a group of 28 service industry veterans and current leaders met in a series of virtual roundtable discussions, organized and facilitated by [Klever Insight](#), to discuss how to identify and develop next-generation services leaders. In fact, the participants were polled beforehand about the key issues—anything industry-related was on the table—they'd like to explore in the weekly roundtable.

The group overwhelmingly chose leadership development of team members as its #2 hot topic.

They each recognized that as they climbed the ladder throughout their own careers, they often did it without any formal guidance. Sometimes they were fortunate to have mentors who taught through example, but often they felt uncertain about all the skills at which they needed to excel.

Through the discussion, the roundtable members were able to define the types of team members that stood out as leadership candidates, and the skills those workers should develop further if they hope to lead a services organization in the future. In this way, the group has put together a kind of industry-standard roadmap for developing the complete services leader of the future.

Problem

According to IT training organization Global Knowledge, [two-thirds of IT professionals who changed employers last year](#) did so in pursuit of better growth and development opportunities. More than half of the IT professionals GK surveyed said they planned to at least casually look for a new position in 2020. Clearly, across the IT industry, many workers want to advance along their career path and pursue leadership positions.

Leadership in services and support is, however, a tough role to fill. In addition to being able to handle day-to-day operations, it is critical that managers see the big picture—how does the services organization help a company fulfill its overall mission?

Problem

How do today’s leaders identify the future leaders on their teams? Are they prepared to issue clear direction on the qualities and skills that will help team members one day lead the pack?

For workers in the trenches, the goal posts are always changing—performance metrics are adjusted frequently, yet they don’t always signify some of the most valued managerial skills, such as organization, communication, planning, big-picture problem-solving, and collaboration, among others. What guidance can services veterans provide to up-and-coming team members to help them develop the skillset they need to stand out as future leaders?

Outcome

Identifying Leadership Traits

To structure their brainstorming session, the roundtable members followed an outline based on a format detailed in a [Harvard Business Review](#) article. The methodology identified seven competencies found in good leaders.

In the first round of brainstorming, the services leadership roundtable identified the skills and personality traits demonstrated by team members who they would notice as potential leaders. The roundtable agreed that the following characteristics would make a team member stand out as a future supervisor or manager:



Outcome

- **Successful in their current role.** This meant that the employee could perform well based on the client need or any other task they were asked to carry out. They own impactful projects, and complete them ahead of deadline, executing effectively to expectations. These employees exemplify a good work ethic and go beyond what's expected of them to get ahead of the job at hand.
- **Trustworthy and trusted.** This trust works on two levels—they are loyal, honest, and operate with integrity, so they can be trusted with sensitive matters as well as critical tasks that must be carried out perfectly; this trustworthiness earns the respect of their co-workers, managers, and customers, which often results in them being viewed as “leaders without titles.” They first earn respect, then demand it from their colleagues. On another level, their managers feel confident they will complete assigned work at a high level and be accountable if challenged on it.
- **Willing to take ownership.** Taking ownership means accepting a task and running with it. If they encounter a problem, they find a way to solve it. They see a project through to the end, seeking assistance where needed but are not afraid to change course if they find the current path offers no clear movement forward. Additionally, rather than seeing the task at hand as a steppingstone to their next high-profile assignment, the employee thinks more about the impact the accomplishment will have on the team and the overall mission. Most importantly, this employee looks to solve problems for their manager, offering to take projects off their plate.
- **Takes initiative.** Rather than wait to be put in charge of something, the employee takes a leadership role where a project is floundering. Their confidence and creative problem-solving ability results in other team members viewing them as the leader and taking direction from them.

Outcome

This employee looks at challenges as opportunities to make a difference and moves forward to implement their ideas. It's important to remember, however, that it's not only extroverts who jump in to steer a project; quieter, heads-down employees who get the job done with no fuss have just as much potential to lead.

● **Communicates well.** Again, the loudest person in the room isn't necessarily the best communicator. Look for team members who are willing to listen, strive to understand, and demonstrate empathy to other team members, in addition to the team members who are quick to voice an opinion or cast a vote. Potential leaders also show a flair for interpreting high-level directives from the organization's leadership into projects and tasks that support that grander vision. They are comfortable communicating with all stakeholders and easily collaborate across teams and departments to get things done.

● **Charismatic.** This is the employee who creates a natural sense of trust and confidence during customer calls, while serving as the unnamed team leader among their colleagues. The rest of the team often agrees with their input during meetings, and their comments sound positive, motivational, honest, and calm. This is the employee other workers will ask for guidance or assistance, as well as the one the managers consult when they want a better view of what's going on in the trenches.

● **Curious.** This worker doesn't think they know everything. They are eager to learn more, particularly if it is a new skill that will help them increase their value to the organization. They ask questions, master new technology before they are asked to, and often bring new ideas to their managers based on something they read in a trade magazine or business website.

● **Fair.** This is the employee who prefers to share kudos with the team, and never takes credit for something they didn't do.

Outcome

Results Orientation



GOOD – Achieves goals

- Gather feedback from stakeholders
- Establish clear vision and goals and continuously reinforce them
- Establish milestones/metrics to gauge progress toward reaching goals
- Understand the difference between goals on activity-based measures and goals on outcome-based measures
- Hold team (and self) accountable for results
- Map business outcomes to financial results



BETTER – Redesigns processes for breakthrough results

- Use metrics to identify bottlenecks
- Search industry resources to find best practices, but realize that is not the state-of-the-possible
- Seek opportunities to expand local experiments globally



BEST – Transforms business model

- Create bottom-up empowerment for continuous improvement
- Empower individual contributors to see/solve problems
- Tolerate "good failure" – use failure as a teaching/learning moment
- Drive top-level metrics that support the business

Strategic Orientation



GOOD – Defines plans within strategy

- Joins in strategic planning sessions
- Tasked with a strategic assignment but augmented with a sponsor

Outcome



BETTER – Defines multi-year strategy for their own area

- Accept “stretch” assignments
- Gain access to cross-functional mentoring programs
- Understand market and company position
- Hold small experiments on an ongoing basis
- Make strategic financial investments over time, understanding tradeoffs



BEST – Changes business strategy for multiple areas

- Read material produced outside their own organization
- Participate in industry conferences and contribute to the field
- Proactively engage with peers across the support organization
- Work with adjacent organizations (e.g. sales, product management, engineering team) to define strategy
- Initiate company-wide new programs (e.g. customer success, knowledge sharing)

Collaboration and Influence



GOOD – Actively engages with colleagues

- Seek first to understand
- Show empathy in interactions
- Give useful feedback (balanced, not too much, fact-based)
- Harness the ideas of others
- Actively inclusive of global and remote team input



BETTER – Establishes collaborative culture

- Listen to diverse viewpoints
- Understand needs of other teams and feed them
- Model examples of strong collaboration for team
- Introduce and create new relationships to overcome bottleneck

Outcome

- Identify and align with "change agents" who are strong influencers
- Leverage the right technology for collaboration
- Consistently crowdsource team input to goals and policy
- Encourage quiet collaborators to speak up
- Celebrate results of collaborations to build trust and accelerate future collaborations
- Give credit to others
- Commit to the success of their peers



BEST – Forges transformational partnerships

- Establish relationships and collaboration across organization, outside department
- Bring together parties (individuals, teams) that don't work well together
- Create common visions
- Accept the risk that others carry
- Provide feedback to others to promote change
- Implement RACI (and similar) to encourage consulting and informing cross-functionally
- Thoughtfully choose when to build consensus and when to drive what they think is right
- Enable inspiration as opposed to dictating the direction
- Establish a pattern of successful choices and enhance personal brand
- Influence outside of the organization
- Build network of relationships and introduce people
- Defend other people's ideas and requests

Team Leadership



GOOD – Explains Intent and Context

- Exemplify fairness

Outcome

- Train on different styles
- Celebrate diversity within team
- Focus on culture and values
- Connect actions to the vision
- Earn team's respect
- Lead by example
- Develop people
- Champion the team
- Represent the team needs and desires well to the rest of the company
- Transparency
- Translate broader business goals to department's own goals
- Regular touch points with team (every two weeks at the minimum)



BETTER – Empowers team to work independently

- Enable the voice of others
- Help each team member understand role on the team
- Allow team members to fail safely
- Cheer the team on and celebrate success
- Build a top-performing team
- Set expectations and clarify process for collaborators
- Helps each team understand what “independent” means for them
- Collect and act on 360° feedback
- Represent voice and thoughts of team to the rest of the organization
- Make others better
- Be willing to openly address hard topics



BEST - Builds high-performance culture

- Demonstrate leadership!
- Get to know your co-workers/team but be aware of fraternization challenges
- Help team members create growth plans within or outside the organization

Outcome

- Celebrate success publicly, dissect failure privately
- Inspire autonomous cross-functional collaboration
- Define and live the organization's mission, culture, and values on a daily basis
- Create a feedback culture
- Set guiding principles
- Share with others outside of team
- Foster cross-functional collaboration/innovation/success

Developing Organizational Capabilities



GOOD - Supports team members' growth

- Basic financial training
- Ensure all have a voice
- Build diverse, equal, and inclusive teams
- Provide horizontal experience across business (using special projects or sprints)
- Develop in-depth understanding of company departments, where friction points are, and why they exist
- Attend recurring meetings outside their own department
- Seek learning opportunities in business and process in other areas of the organization
- Leverage social networks
- Delegate
- Learn to manage beyond just metrics
- Step outside of comfort zone
- Seek to move laterally prior to vertically
- Comfortable delivering feedback
- Assume positive intent
- Create challenging opportunities



BETTER - Aids development outside team

- Seek assignments requiring collaboration across organization

Outcome

- Lead a cross-functional team for a major initiative
- Willingness to move laterally to strengthen core knowledge
- Network to learn from others
- Have a near-term succession plan
- Influence and build “multiplier effect”
- Make appropriate suggestions for improvement to team’s outside support
- Work outside of team to drive end-to-end capabilities (company-wide)
- Create and use developmental action plans to improve competencies and results
- Serve as mentor to others
- Assign projects/work that exceeds current capabilities but then support success
- Be generous giving informational interviews
- Support formal learning opportunities



BEST – Create a culture of talent management

- Promote to edge of comfort level, before they feel ready
- Put in place continuous succession planning and action
- Develop leadership across the organization
- Hire people better than self
- Study talent management in other companies/industries/teams
- Promote “emotional quotient” development
- Get experience outside the office, e.g. non-profit
- Get involved in global talent management, not just local area
- Have a talent management framework
- Get involved in managing capabilities outside of their team

Change Leadership



GOOD – Supports change

- Give exposure to slow/no-movers
- Start with the “why”

Outcome

- Provide coaching
- Learn change management methodology
- Understand other areas are impacted by change and include others
- Continually explain reasoning and rationale to teams about change



BETTER – Makes a compelling case for change

- Focus on the future of success
- Do post-mortem exercises on major change initiatives to identify lessons learned
- Have a personal change management plan
- Empower continuous change as an alternative to monolithic strategic change initiatives that lack bottom-up ownership
- Consistently employ change management strategies into daily work
- Openly share struggles to change oneself/own team
- Create space for change
- Bring people along
- Set the bar to be achieved and explain the benefits of the change
- Share benchmarks and industry best practices



BEST – Mobilizes others to initiate change

- Inspire others to leverage defined change management methodologies
- Encourage experimentation within team
- Proactively mitigate fear as the natural response to change
- Relate and connect with the majority
- Build culture where people feel safe taking risks
- Reward experiments even when they fail
- Provide framework to "test" changes and gather feedback
- Encourage risk

Market Understanding



GOOD – Knows market

- Learn how customers benefit

Outcome

- Be part of a survey program (NPS) to help define the “customer speak” within the company
- Visit the customer's location (when possible)
- Attend industry events and read industry news
- Understand buyer profiles/personas
- Build personas and leverage customer journeys
- Partner with sales and marketing teams to understand market better



BETTER – Investigates market and customer dynamics

- Identify new market ideas within existing customer base
- Participate in local user groups
- Take an active role in an industry-based committee
- Implement a customer advisory board with your customer base
- Understand the target market’s market (and their customers' needs)
- Offer new support plans to support changing market needs
- Analyze differences in customer contact reasons by customer vertical/size/geography
- Tailor specific solutions based on customer profile



BEST – Identify emerging business opportunities

- Join advisory boards
 - Author standards for innovating in the space
 - Accurately forecast based on historical patterns
 - Aim for where the market is going, not where it is today
 - Use available customer data to identify trends and make actionable recommendations
 - Seek ideas from outside the industry/vertical
 - Study patterns/changes in adjacent markets to identify potential changes to own market
 - Seek out visionaries and elaborate on their ideas
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Conclusion

As the Services industry continues to change and evolve at the speed of light, the demands on services and support teams grow more challenging and complex. It is critical, particularly in a time where the industry has been challenged in recruiting and retaining talent, for senior leadership to support team members in advancing their careers through on-the-job training as well as mentorship and career development opportunities.

Today's leaders can form the next generation by encouraging an entrepreneurial attitude within teams and identifying potential leaders early on, so they have the time and focus to develop the wide range of skills they need to be successful and optimize the performance of their organization. This challenge can be slightly easier if the industry adopts a standard "skills" list—including both technical and "soft skills"—that could help team members steer their own learning and development as well as take advantage of the guidance and mentoring of their team and organizational leaders.

Roundtables with Phil

The Services Roundtable is an informal "think tank" organized to help service, support, and shared services leaders share knowledge while faced with challenging circumstances. Assembled by Klever Insight's CEO Phil Verghis, who believes "all of us are better than any one of us," the roundtable meets regularly and remotely to listen to member concerns, consider their ideas, and draw conclusions around best practices they can put into action in their own organizations.
