

Leadership Series
Insurance

Supporting our leaders to flourish

Spring 2024

Insurance Leadership Forum attendees:

Rodney Assock, Culture & Corporate Social
Responsibility Director, LV=

Kirk Bradley, Director of Customer Service, Bupa UK

Bridget Colloby, Head of Commercial & Specialty
Marketing Strategy and Proposition, RSA Group

John Crawford, Head of Renewals and Home,
Hastings Direct

Andy Holbert Rolls, Senior Continuous Improvement
Lead, Ageas UK

Jason Mann, Operations Director, PIB Group Ltd

Phil O'Shiel, Group Account Director, Diligenta

Matt Rummins, EMEA Head of Account & Success
Management, Intradiem

Chris Ward, Head of Customer Relations, Markerstudy

Insurance Leadership Forum

The Leadership Series is the documented output from CCMA's Leadership Forum meetings. These take place at the House of Lords and provide an exclusive opportunity for senior contact centre and strategic leaders to explore the key factors driving change in their industry and to consider how to continue innovating and adding value for the benefit of the customer, colleagues, and the business.

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Supporting new and future leaders

The latest CCMA Benchmark suggests that today's team leaders now each manage 11 advisors on average – down from a 15:1 ratio a few years ago. Leigh Hopwood, the CCMA's CEO asked whether this was reflected across the different insurance firms represented at the forum. Not surprisingly, a range of different organisations in attendance meant a range of answers, but the responses reflected a broad agreement around the 11:1 ratio. Firms represented varied in size from PIB Group with three operations managers and five team leaders, whilst major brands such as LV= have 180 team leaders and 18 operations managers, and Diligenta with 150 team leaders and 20

operations managers. However, all faced similar challenges in supporting potential future leaders.

For example, John Crawford at Hastings Direct has around 50 team leaders and six operational managers. Three years ago, they all went through an active management programme, but experienced it was difficult to keep this training alive with new leaders coming in. Consequently, Hastings Direct is now planning on a running a next generation rolling Operational Leadership programme.

At Bupa, Kirk Bradley has also been through the same process, with 100 team leaders and 15-20 other managers all experiencing Leaders of the Future training. However, the process raises some fundamental questions, explained Kirk: **“How do**

you give people leadership experience before they're a leader? Often what actually happens is that a team leader assumes their new role and has two choices – either do what they're comfy with or follow what their predecessor did. That's why there needs to be a more structured approach.”

At PIB Group they have a different tactic, with no formal aspiring leaders programme they have a more personalised methodology. But according to Jason Mann, PIB Group's Operations Director, **“this does mean we can get to spend more 1:1 time each week with individual advisers. It's probably a more unstructured approach, and it does reflect the less institutional nature of our business.”**

How are leadership roles evolving in today's insurance contact centres? What are people responsible for today?

Recognising that roles across the contact centre were changing, Leigh asked whether the senior leaders felt their frontline roles now demanded more capable individuals – and did that in turn require team leaders to develop additional management skills?

According to Markerstudy's Chris Ward: **"our leaders have to deal with a broad range of demands on their time. They've got to manage the agent population, carry out coaching, support new regulations, carry out AI [Artificial Intelligence] testing, interface with customer service leadership, plan for the next 24 months, and also work on special projects where required. It's a complete mix of day-to-day operational stuff as well as strategic delivery."**

Bupa's Kirk Bradley agreed – **"ours handle a very broad spectrum of tasks. One minute they could be focused on deploying multi-million-pound technology deployments to an individual's personal challenges outside of work. However, leadership is clearly evolving – you only have to consider all the digital aspects**

of today's role to see how much it is changing. We're also seeing two important additional changes. There's now a much more pastoral side to the role as we champion advisor wellbeing, and we're also working in a world where the use of data is now critical in terms of the insight we bring to our decision-making."

For John Crawford at Hastings Direct, team leadership has certainly become a more challenging role. **"Team leaders have to connect with their people, really understand how they work and find ways to motivate them. They also have to be organised, know how to prioritise, communicate effectively, and know exactly who to speak to and how to fix things when they go wrong. So how do we know that they're going to become good team leaders – or do we just hope that they will pick up the role and things will go well?"**

"Over the past few years we've also ended up in a hybrid world with many advisors either working from home or part-time in the contact centre. But have we invested enough in running our teams across a hybrid environment. Some team leaders have reacted brilliantly to this, while others are less comfortable," added John.

"It's important that we give people the skills they need to transform the business," added Diligenta's Phil O'Shiel. **"Empathy and conversational**

talent are clearly still core contact centre disciplines, but we also need people who are able to improve customer outcomes by optimising processes."

How do we help the right people to target leadership roles in the contact centre?

Having discussed the kind of skills needed to succeed in contact centre leadership, Leigh then asked how people were working to ensure that the right advisors felt confident in challenging for leadership positions.

John Crawford explained how the Hastings Aspiring Leaders programme was designed specifically to target people with potential. **"We're always looking for advisors with the right behaviour sets and who consistently do their core job well. This earns them the chance to dip into other opportunities. We also run apprenticeship programmes that are available to everyone, but we're always keen for candidates who take the initial steps themselves."**

Bridget Colloby from RSA Group agreed, saying: **"it's important to combine self-drive with a framework to help potential leaders. For example, it's good for them to talk to managers. That's certainly not as daunting a challenge as many may**

think...particularly if you've set up a group of managers across the business who are open and friendly to being approached. It's all about identifying people and connecting them."

Kirk Bradley sees this as part of a continuous improvement process at Bupa. **"We're always interested in Change Makers – people who are always keen to identify potential improvements and triage changes. They may not always be right for the team leader role, but there's lots that they can still do."**

"Potential leaders have to take personal responsibility for their progress," added Phil O'Shiel. **"Be different, if doors open walk through them, and train yourself – don't wait until you're offered something. Leaders also need the right kind of training. Get it right and it can last for decades - not just in the contact centre but also across other parts of the business where people might have moved to."** John Crawford echoed this, saying **"it's great to have contact centre advocates across the business."**

What can we do to help advisors who don't want to go down the team leader route?

There are only so many team leader or operations manager roles available. So Leigh asked the group what happens to talented advisors who don't

progress down this route?

"Some people are really good advisors, but just aren't team leaders. That's not the end of the world, there's lots of potential sideways and outwards moves – whether it's coaching, data or resource management," said Jason Mann. **"We always ask what people are interested in,"** added Chris Ward. **"And we get IT, HR, Tech Underwriting and other teams to come into the contact centre and talk about their roles. Of course this means we might lose a few potential team leaders, but they're now delivering value in other parts of the business."**

Others acknowledged this strategy in their own organisations. Phil O'Shiel felt it was **"our job to create pathways from the contact centre to all other peripheral roles"**.

Does mentoring have a role to play in this?

Andy Holbert Rolls felt that mentorships were a great way of helping potential leaders to find the right opportunity. **"Although the best mentors aren't always the most obvious ones,"** said Andy.

Bridget Colloby said that she was currently mentoring a team leader with a very different set of experiences. **"We have regular meetings on Teams, with the goal of seeing if we can make the right connections and draw on our different experiences to open up potential leadership pathways."** At LV= Rodney Assock said **"we love mentoring! We've got lots of it going on, with a mix of strategic mentoring and tactical coaching."**



Are we supporting our contact centre leaders enough?

When it comes to providing contact centre leaders with the right support levels to deliver on their roles, Leigh asked whether the accidental manager, 'advisor on a Friday, team leader on a Monday' scenario, was still a reality?

Andy Holbert Rolls at Ageas UK spoke about the growing complexity and variation of roles that more traditional operations managers are now taking on. **"We've got operations managers that have moved in CX roles mapping customer journeys and others now working on transformational projects as product owners. Formal qualifications are available to support the transition (i.e. product owners/scrums master qualifications)."**

"Team leaders certainly need some basic tools before they start the role," added Jason Mann. **"We've got so many calls coming in that it's unfair for team leaders to be unprepared in their role. Of course, there's lots of courses that people can go on, but we've got to make sure that course content actually reflects what leaders are then expected to deliver. It's also important that there are role models in the business who will inspire new leaders to perform."**

Does hybrid working present a challenge for contact centre leadership?

Given the complexity of contact centre leadership roles and the wider shift towards hybrid working, is hybrid working making the task more difficult for team leaders and operations managers.

"I've always found that advisors became team leaders because of the skills they demonstrate, but identifying this kind of performance becomes more difficult when people are working remotely," said Phil O'Shiel. **"It's certainly harder to understand how people really work when they're at home – and you can't just jump into a live Teams call to check how they're doing."** Andy Holbert Rolls agreed, saying **"Sometimes coming in to the office can feel less productive in some ways – as working from home can have the benefit of having less distractions. But coming into the office allows us to be productive in other ways – building and maintaining relationships and collaborating face-to-face. So having a hybrid of both work environments works well."**

Kirk Bradley recognises the difficulties involved in balancing remote working with the benefits of the office.

"My concern is that we don't really know who people are sat next to when they're working remotely, but at the same time they may actually be a bit more productive than their office colleagues. Monitoring can be onerous for those at home, and they may feel cut off from office team meetings. That's why we try to arrange office connection days and volunteering days to encourage greater engagement."

At Markerstudy Chris Ward noted that **"I try to get out across as many sites as I can, and invariably leave at the end of the day with long lists of actions, recommendations and things to do. That doesn't happen with Teams calls. However, you've also got to acknowledge that remote and hybrid working has become a realistic option thanks to the many amazing tools and skills that are available. Having different working situations available opens up great opportunities."**

Advice for contact centre managers to help ensure their leaders flourish

Concluding the CCMA Insurance Leadership Forum, Leigh asked each group member for one piece of advice that they would give to help team leaders, operations managers and future managers to flourish:

Chris Ward, Head of Customer Relations, Markerstudy – “Don’t be scared of just trying things. Stick your neck out and just do it! When you’re wondering ‘why can’t we do this?’, just try it and find out. Three out of four times things usually work out well. I certainly regret not being brave enough earlier in my career.”

Jason Mann, Operations Director, PIB Group Ltd – “We’re always busy and there are so many distractions that can easily knock you off track. However, you’ve got to be disciplined in your role – as contact centre leaders we’re employed to help our people to perform better – that’s what’s really important, and it’s what we should really be focused on – rather than whatever strategic or transformational task currently seems more important.”

Andy Holbert Rolls, Senior Continuous Improvement Lead, Ageas UK – “Trying to master all the things we have spoken about today can be challenging at times due to the number of meetings and calls being attended in a remote-working world. My advice would be to make enough time for “thinking space” so that you can do the things that will help your leaders flourish.”

Kirk Bradley, Director of Customer Service, Bupa UK – “I look back on my own career and feel that I was more focused on competency rather than potential opportunities. Now I believe that people should always give things a go, particularly if they spot an opening – and don’t worry about whether you can fill the role, you’ll quickly get to grips with it!”

Matt Rumins, EMEA Head of Account & Success Management, Intradiem – “People first need to understand that there are plenty of opportunities – so let them know, and give them the confidence to go for them when they’re available.”

Phil O’Shiel, Group Account Director, Diligenta – “Watch out for imposter syndrome, and the feeling that we’re either not ready or don’t deserve that important next role. We don’t talk about it very much, but almost everyone suffers from it, and it can easily get in the way of people doing their best work.”

John Crawford, Head of Renewals and Home, Hastings Direct – “It’s easy to get wrapped up in your own work very quickly, but it’s essential that we remember that we’re part of a wider community peer group. So get to know your teams, dedicate yourself to your leadership group – it’s still a people business.”

Bridget Colloby, Head of Commercial & Specialty Marketing Strategy and Proposition, RSA Group – “Leaders need to be confident and have built up a blend of skills and customer service experience that others in your organisation perhaps aren’t brave enough to match. Get this right and keep working at it and you’ll also create potential new pathways for you to flourish.”

Rodney Assock, Culture & Corporate Social Responsibility Director, LV= – “Be really clear about the purpose of your role and, if what you’re doing doesn’t support it, stop what you’re doing. I come to work to inspire people, and I’m always looking for something different that people can bring to the role.”

Kirk Bradley, Director of Customer Service, Bupa Global – “Make sure that your leaders find their own thing that they really care about – for me it’s the hustle & bustle that only operations can bring – particularly in places like our Staines and Manchester contact centres.”

John Crawford, Head of Renewals and Home, Hastings Direct – “Get people involved in industry groups like the CCMA, attend awards dinners, and get them to work on their own awards nominations – it’s a great way of affirming what they do.”

Rodney Assock, Culture & Corporate Social Responsibility Director, LV= – “And when it comes to awards, support your team in understanding the difference between great and not-so-great nominations – your input as an experienced leader can really make the difference.”

About the CCMA

For nearly 30 years, the CCMA (Call Centre Management Association), as the longest established contact centre industry body, has been dedicated to supporting contact centre professionals across the UK. Founded on the principles of sharing best practice and networking to improve skills and knowledge, the CCMA is a thriving community that represents leaders from a huge cross-section of the industry.

Membership of the largest community in the industry offers unique opportunities, such as free annual benchmarking of 25+ KPIs, free entry into the UK National Contact Centre Awards and free tickets to the UK National Contact Centre Conference, invites to Executive Networking Dinners and exclusive events for members-only. Members also benefit from discounted training through the UK National Contact Centre Academy, the industry's training partner.

To support the industry further, the CCMA conducts regular original research for download, including the annual Salary and Skills Guide and the Voice of the Contact Centre Consumer research, the Evolution of the Contact Centre tracking the industry's progress and Good Practice Guides on a variety of topics.

www.ccma.org.uk

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