

How to Maximize Field Visits for Leaders

As your setting your plans for 2020, establishing your goals, and updating your TeamStrength Scorecard (members), consider a focus on time in the field. Several of our members track branch or store visits or job site visits to make sure they stay connected to the most important parts of their business. Fight to ensure that you're not trapped in your office or conference without being informed by the realities of your business.

“The managers most responsible for a company’s success or failure happen to be the ones with whom the CEO spends the least amount of time. The people I’m talking about are frontline managers—shop-floor supervisors, leaders of R&D or sales teams, managers in restaurant chains or call centers. They’re at the very first level of management across a company’s business operations and functions.” Fred Hassan from HBR

Whether your frontline personnel are sandwich artists, digital marketers, retail associates, customer service representatives, roofing/automotive/window salespeople the face of external every company is the people who interact with the customers. To understand this side of the business, field visits can be an invaluable tool for leaders all the way up to the CEO level.

Frontline employees close the feedback loop that allows the CEO to stay abreast of the latest developments and roadblocks in the business. Frontline managers have their fingers on the pulse of operations and of the marketplace. Easy and open communication with them helps the CEO detect unanticipated developments and respond to them rapidly. CEOs who spend time in the field can more easily communicate the strategy directly to them and get them to own it.

Fred shares how leading through the front can create a culture of transparency, similar to that of Ray Dalio’s TED talk which we shared in 2019.

1. **The CEO Dialogue:** When engaging with frontline managers, Fred claims you have to be willing and able to get into the nuts and bolts of the business. CEOs will learn that what seem like trivial issues or problems often turn out to be incredibly important.
2. **Decide When to Go Deep:** Take the seemingly trivial issues seriously to determine if they merit solutions that lead to a viable way to improve your business overall.
3. **Expose the Senior Managers to Frontline Perspectives:** “One of the key tasks for any CEO is to be the architect of how decisions get made in the company. A CEO who leads through the front will incorporate voices from the frontline ranks into management’s decision-making process.” And set the right examples so your senior leaders don’t become victims of the dreaded disease office-itis as well.
4. **Connect the Frontline with a Higher Purpose:** The more hands-on the CEOs are in interaction with the frontline, the better. Whether it’s by selling directly, making sandwiches, or dealing with unhappy customers, working beside the CEO can connect frontline employees to the value of the work that they do.
5. **Empower the Front without Undermining the Middle:** Focus on striking a balance between empowering frontline employees and making sure you don’t short-circuit the formal chain of command by responding to information via company policy, not individual punishment. When it comes to sharing, leading through the front creates an open system where managers can’t hold on or hide information that needs to be shared.

Field visits can give leaders striking new ways to improve their business, leaving leaders energized and their employees more engaged. Whether the field visit is spending a half-day sitting next to customer service employees or listening to incoming calls or riding along with a sales rep, the benefits are significant and wide-reaching.

- **It provides an unfiltered view of reality.** Sitting in the corner office can make it difficult to obtain an unvarnished view of the business, information that reaches your desk can be sanitized through management layers. Field visits show you everything, the good and the bad. Leaders can see it all through two perspectives – the employee and the customer.
- **It reveals internal impediments.** Tell yourself the best story – your employees want to come to work every day to do a great job for the company. Field visits give you an inside look at any internal impediments that are getting in their way such as inefficient business processes, inadequate IT systems, misguided metrics/incentives, poorly document procedures, or weak cross-unit collaboration.
- **It builds empathy.** Leaders who observe these pain points firsthand can better connect with frontline employees.
- **It strengthens executive credibility.** After a field visit, leaders can send a powerful signal to the workforce by translating what they saw it into specific, tangible management actions no matter how small (or starting on one that's large). This tells your frontline how much value they hold and that they are supported.
- **It humanizes business leaders.** Field visits put faces to the names that come behind many of the decisions at a company. It helps frontline employees see leaders are regular people who care about their employees.

Well known CEOs like Jeff Bezos of Amazon, Herb Kelleher of Southwest and Jim Sinegal of Costco all recognized that spending time in the trenches wasn't a discretionary task. Rather, it was an essential element of their leadership approach – an invaluable instrument for cultivating business insight and bridging the chasm that typically develops between the corner office and the cubicles.

<http://customerthink.com/where-business-leaders-should-spend-more-of-their-time-but-dont/>

<https://hbr.org/2011/05/the-frontline-advantage>