

DEVELOPING COURAGE IN THE WORKPLACE



SEPTEMBER 2014

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Overview

Organizations rely on employees to display courage when completing their job tasks and interacting with customers, team members and subordinates. Courage plays a pivotal role in ensuring company representatives accurately reflect organizational values, policies and procedures. Given its critical nature, an examination of the approaches that organizations use to effectively develop courage within the workforce is imperative.

In order to identify these approaches, Acclivus and Training Industry, Inc. partnered in July 2014 to conduct a study of the methods being used by 212 organizations. The study focused on determining the importance of courage to various functional areas, the types of courageous behaviors that organizations reinforce in sales, customer service, and leadership training, and best practices for developing courage in those areas.

Throughout this report, differences in the approaches used by organizations rated effective at developing courage in their sales, customer service, or leadership team members are compared with those used by organizations rated ineffective. These comparisons provide information about the strategies that organizations can use to effectively develop courage in their workforce.

For the purpose of this survey:

COURAGE is defined as the ability and willingness to confront fear, uncertainty, intimidation, or difficulty on the job.

Key Findings

- Courage is considered **very important** for leadership, sales, customer service and HR roles
- Ensuring **top-down support** and **cultural alignment** is a critical best practice
- Less than half (44%) of organizations are rated effective at developing courage in leadership, sales and customer service roles
- Organizations rated effective at developing courage in one area tend to be rated effective in all areas
- Learning leaders suggest that the **most effective methods** for developing courage include
 - Coaching/mentoring
 - Feedback-based development
 - Experiential learning
 - Shadowing/on-the-job observation
 - Networking opportunities
 - Tests/assessments of courage
- Effective programs reinforce all acts of courage more frequently than ineffective programs
- The largest difference in reinforcement frequency between effective and ineffective programs occurred in sales – sales roles represent an area where improvements in reinforcement frequency have the potential to produce large effects
- **Effective leadership training reinforces** the following acts of courage:
 - Insisting on core principles
 - Taking responsibility for ones' decisions
 - Considering alternative perspectives
- **Effective customer service training reinforces** the following acts of courage:
 - Confidence in customer handling
 - Displaying patience and empathy towards customers
 - Offering additional services and recommendations
 - Gathering multiple perspectives
- **Effective sales training reinforces** the following acts of courage:
 - Taking responsibility for sales outcomes
 - Considering creative alternatives to meet customer demands
 - Exploring new business and relationships
 - Applying new skills
- **Effectively developing courage in leadership produces a top-down effective**, leading to more effective development within sales and customer services, consistent with best practice recommendations

Importance of Courage in the Workforce

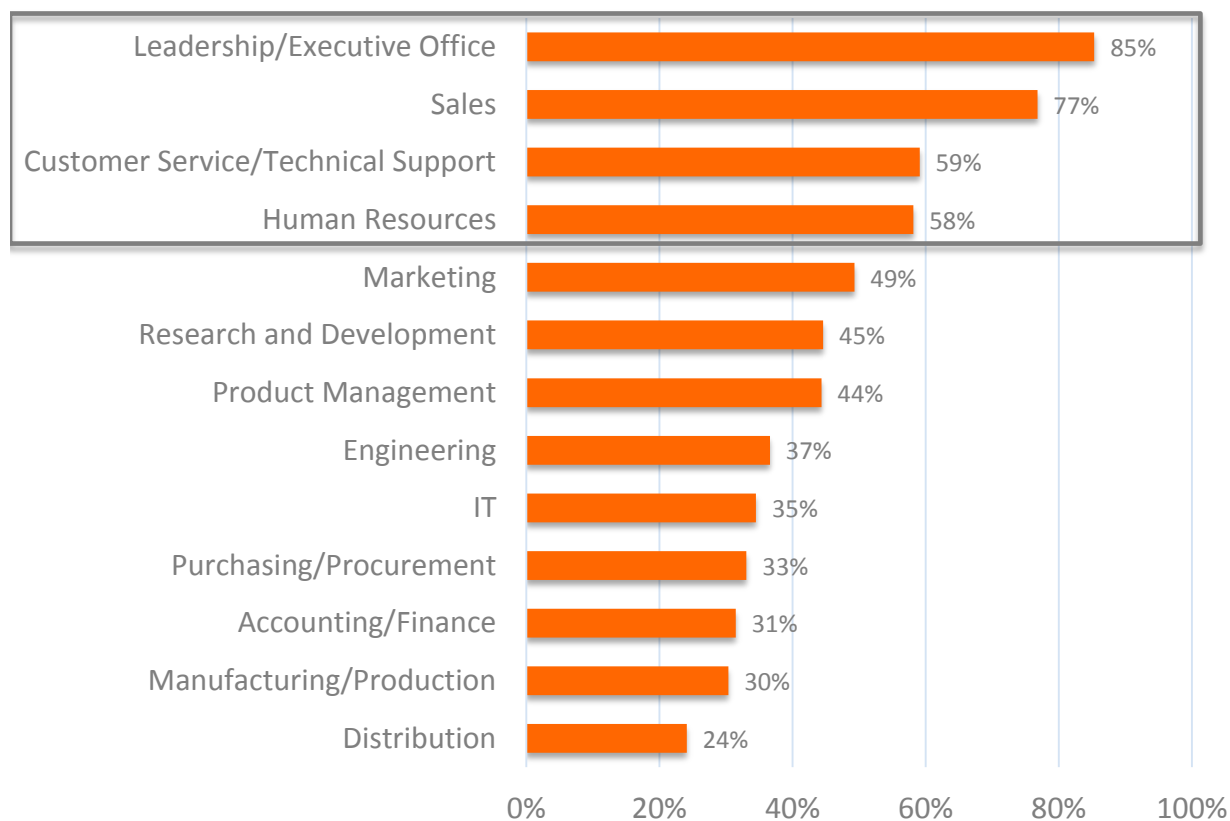
Respondents were asked to provide information on the importance of courage in various organizational roles and to rate their organizations' abilities to develop courage within three functional areas: leadership, sales and customer service. The following details their responses:

Functional Areas Where Courage is Important

When asked about the importance of courage to various functional areas, respondents who offered an opinion overwhelmingly endorsed its importance to leadership, sales, customer service, and human resources (see Figure 1). Notably, between 7-34 percent of respondents reported being unsure of the importance of courage in one or more functional areas. Thus, responses regarding the importance of courage solely reflect the opinions of learning leaders who reported having relevant knowledge; for functional areas outside of their expertise, learning leaders did not provide a rating.

More than half of learning leaders report that courage is *very important* for leadership, sales, customer service and human resources.

Figure 1. Importance of Courage to Functional Areas within Organizations



Percentage of respondents offering an opinion who endorsed very important, N ranges from 112 to 157

Ratings of Effectiveness

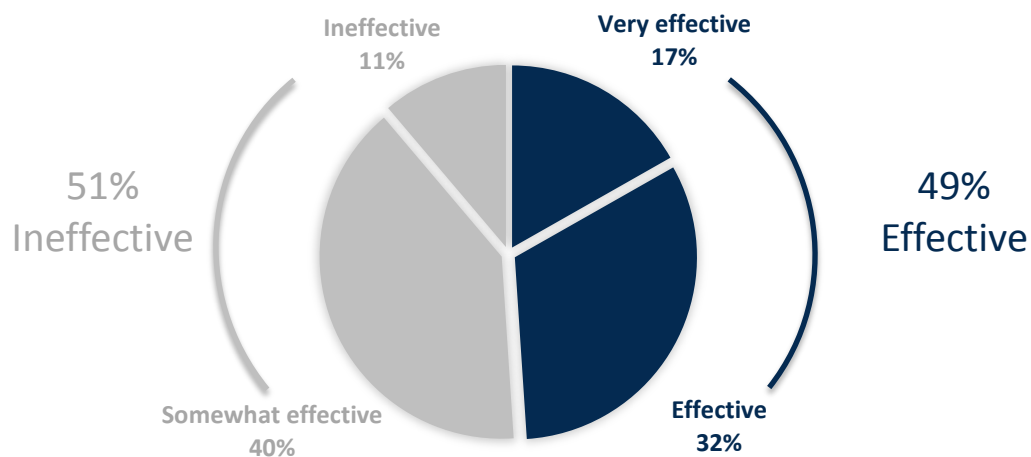
In order to determine the utility of organizational approaches to developing courage, learning leaders were asked to rate their organizations' effectiveness in developing the skills to display courage within

the top three functional areas for which it was considered most important. Of those who reported knowledge of their organizations' effectiveness, between 49-54 percent indicated that their organizations effectively develop courage in each area. Figures 2-4 display the range of responses with regard to leadership, sales, and customer service. Moreover, across all three areas, 44 percent of

Less than half (44%) of organizations are effectively developing courage in leadership, sales, and customer service roles.

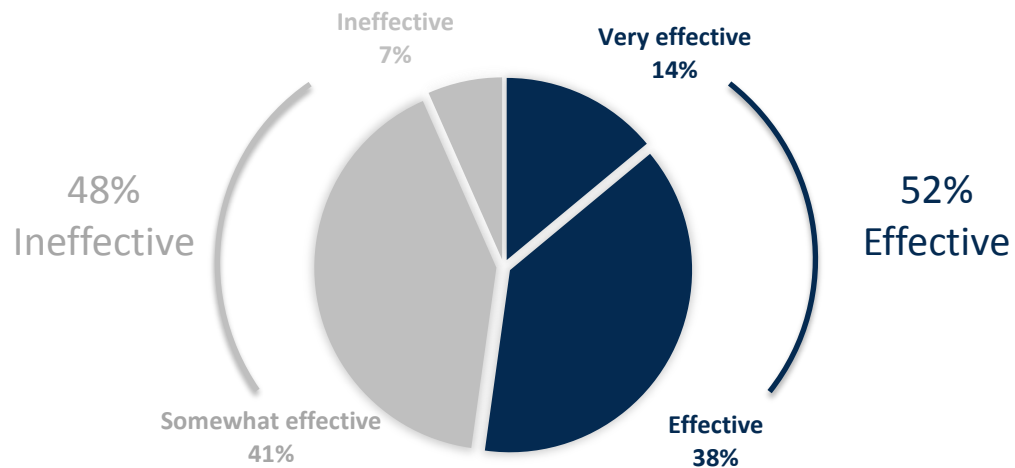
organizations were considered effective at developing courage related skills, indicating that **organizations that effectively develop courage in one area are significantly more likely to effectively develop courage in other areas.**

Figure 2. Organizational Effectiveness at Developing Courage in Leadership Team Members



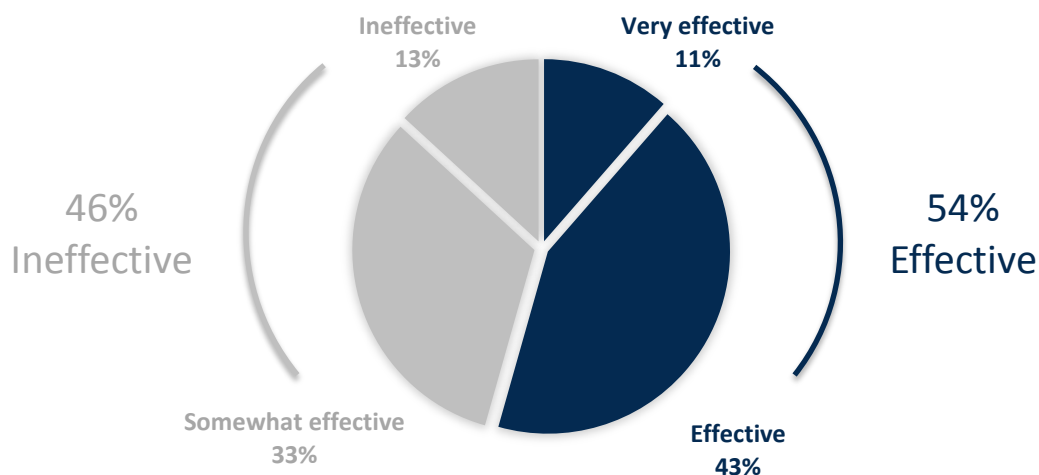
Percentage of respondents, N = 143

Figure 3. Organizational Effectiveness at Developing Courage in Customer Service Team Members



Percentage of respondents, N = 136

Figure 4. Organizational Effectiveness at Developing Courage in Sales Team Members



Percentage of respondents, N = 114

Throughout this report, the effective groups (i.e., organizations rated *effective* or *very effective* at developing courage in either sales, customer service, or leadership team members) are compared with the ineffective groups (i.e., organizations rated *somewhat effective* or *ineffective* in each of those areas) in order to identify practices that differentiate effective and ineffective courage development. In doing so, the report highlights useful strategies for developing courage in these functional areas.

Effective Reinforcement

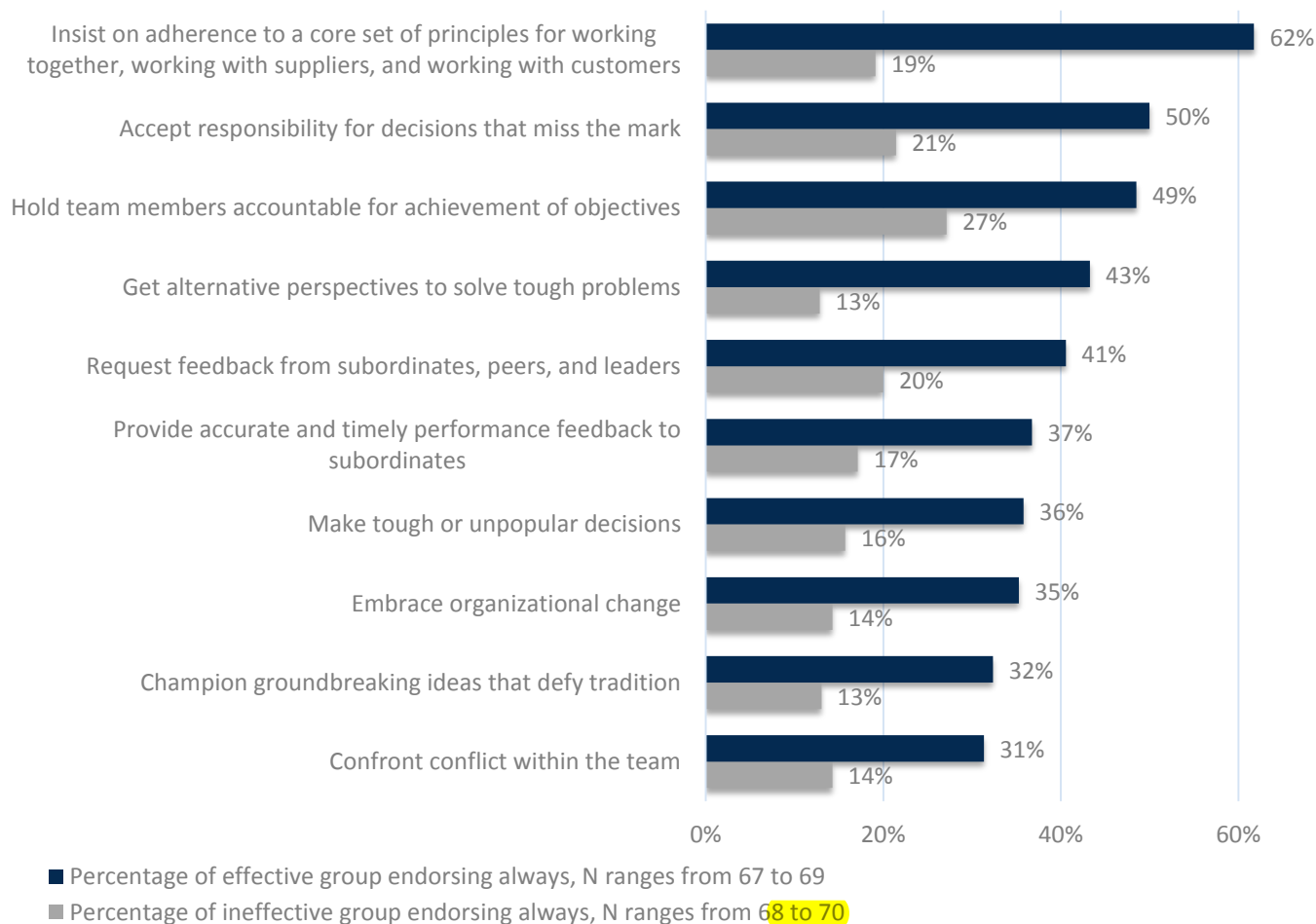
In order to determine the types of courageous behaviors that organizations emphasize, learning leaders were asked about the frequency with which their organizations reinforce various acts of courage within leadership, sales and customer service training; for areas in which they were knowledgeable, learning leaders indicating whether their organizations *always*, *often*, *sometimes*, or *never* reinforced acts of courage during training. Differences between effective and ineffective organizations' reinforcement frequencies are detailed below.

Effective organizations reinforced all acts of courage more frequently during training than ineffective organizations.

Leadership Training: Frequency of Courageous Act Reinforcement

In general, effective organizations were more likely to *always* reinforce all acts of courage during leadership training than were ineffective organizations (see Figure 5). The most pronounced differences occurred in the reinforcement of **insisting on a core set of principles, accepting responsibility for one's decisions, and getting alternative perspectives to solve problems**; effective organizations were *two to three* times as likely to *always* reinforce these courageous acts.

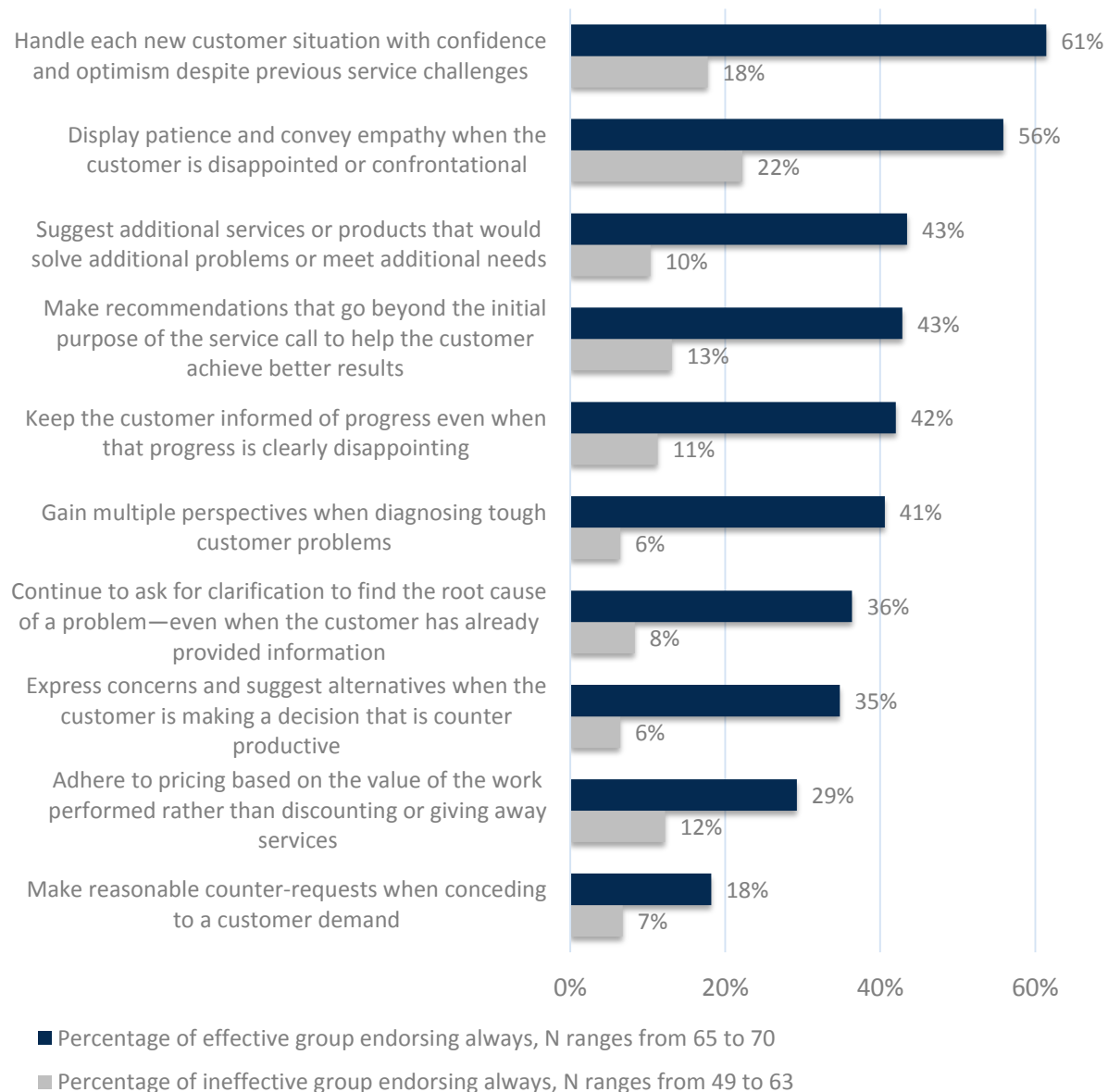
Figure 5. Frequency of Courageous Act Reinforcement during Leadership Training



Customer Service Training: Frequency of Courageous Act Reinforcement

Like organizations that effectively develop courage in leadership training, effective customer service organizations were considerably more likely to *always* reinforce all acts of courage than were ineffective ones (see Figure 6). In addition, **effective organizations reinforced handling each customer with confidence, displaying patience and empathy, suggesting and recommending additional services and gaining multiple perspectives *three to seven times* more often than did ineffective organizations.**

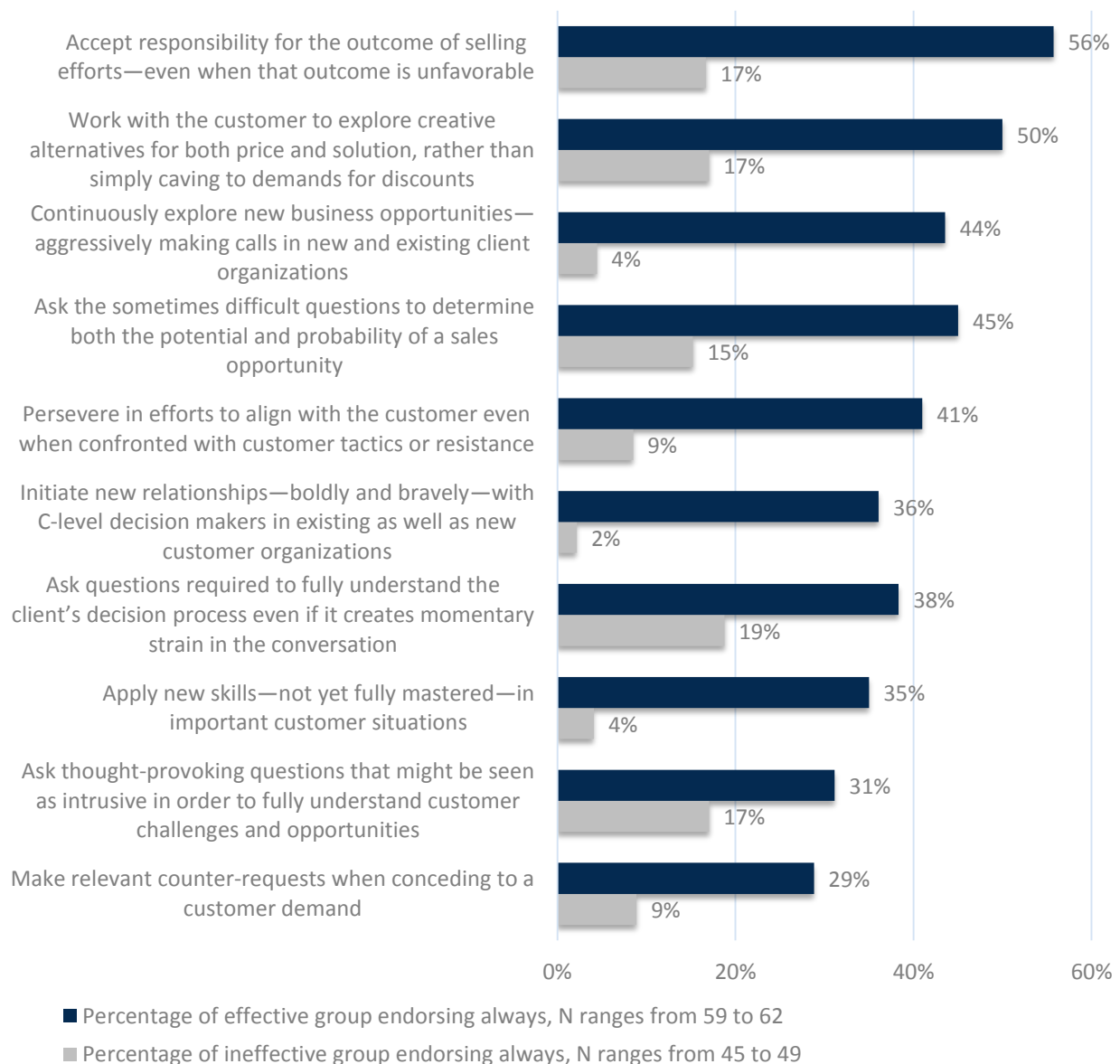
Figure 6. Frequency of Courageous Act Reinforcement during Customer Service Training



Sales Training: Frequency of Courageous Act Reinforcement

Similar to both effective leadership and effective customer service organizations, the percentage of effective sales organizations *always* reinforcing all of the courageous acts during training far exceeded the percentage of ineffective organizations (see Figure 7). Moreover, the gaps in reinforcement frequency between the effective and ineffective sales groups represented the largest amongst the three focal functional areas. These large differences suggest that **sales, in particular, is a functional area where always reinforcing key courageous acts is vital**. Of note is the large discrepancy in the percentage of the effective group *always* reinforcing **exploring new business, initiating new relationships and applying new skills**; effective sales organizations were *11-18 times* more likely to always reinforce these courageous acts during sales training.

Figure 7. Frequency of Courageous Act Reinforcement during Sales Training



Methods for Developing Courage

Organizations have a variety of methods available that can be used to develop courage in employees. However, effectiveness and actual use of those methods may vary by functional area. In order to explore this further, learning leaders were asked about their perceptions of developmental methods and organizational use of those methods. The following section provides further information about their responses:

Perceptions of Methods for Developing Courage

Learning leaders considered certain methods **very effective** for developing courage in all three functional areas, including **coaching/mentoring, feedback-based development, experiential learning, and shadowing/on-the-job observation**. While ratings of effectiveness generally coincided across functional areas, 360-degree evaluations represented a unique method considered moderately effective for leadership only. Likewise, a number of methods were considered relatively less effective for developing courage in all three functional areas, including video, virtual instructor led training (VILT), and short e-learning sessions. The fact that videos were considered less effective for developing courage is perplexing, as previous research has supports videos as a commonly effective tool for developing soft-skills, like courage (e.g., [Using Virtual Environments for Leadership Development, 2013](#))

Effective Groups' Use of Methods

While learning leaders' ratings of effective methods for developing courage offer insight into appropriate approaches, a look at the methods used by effective leadership, customer service, and sales programs provides further information. Table 1 displays the rank orders in which each of the effective groups uses the various methods for developing courage in the workplace. As shown, **effective groups tended to use coaching/mentoring, team building, instructor-led training (ILT) and experiential learning most**. Differences in the methods used across functional areas can be seen in reference to job shadowing/observation and networking sessions. The rank order of networking sessions was much greater for the effective leadership group than it was for the effective customer service and sales groups. Further, job shadowing/observation was one of the least frequently used methods for developing courage in leadership but among the top methods used for developing courage in sales. This finding makes sense given the difficulty that is likely associated with leadership observation. While shadowing and observation are generally efficient developmental methods for sales and customer service roles, where standardized job tasks tend to dominate, the implementation of this method in leadership training may be less straightforward, as a great deal of the leadership role may be unobservable and vary across leadership functions.

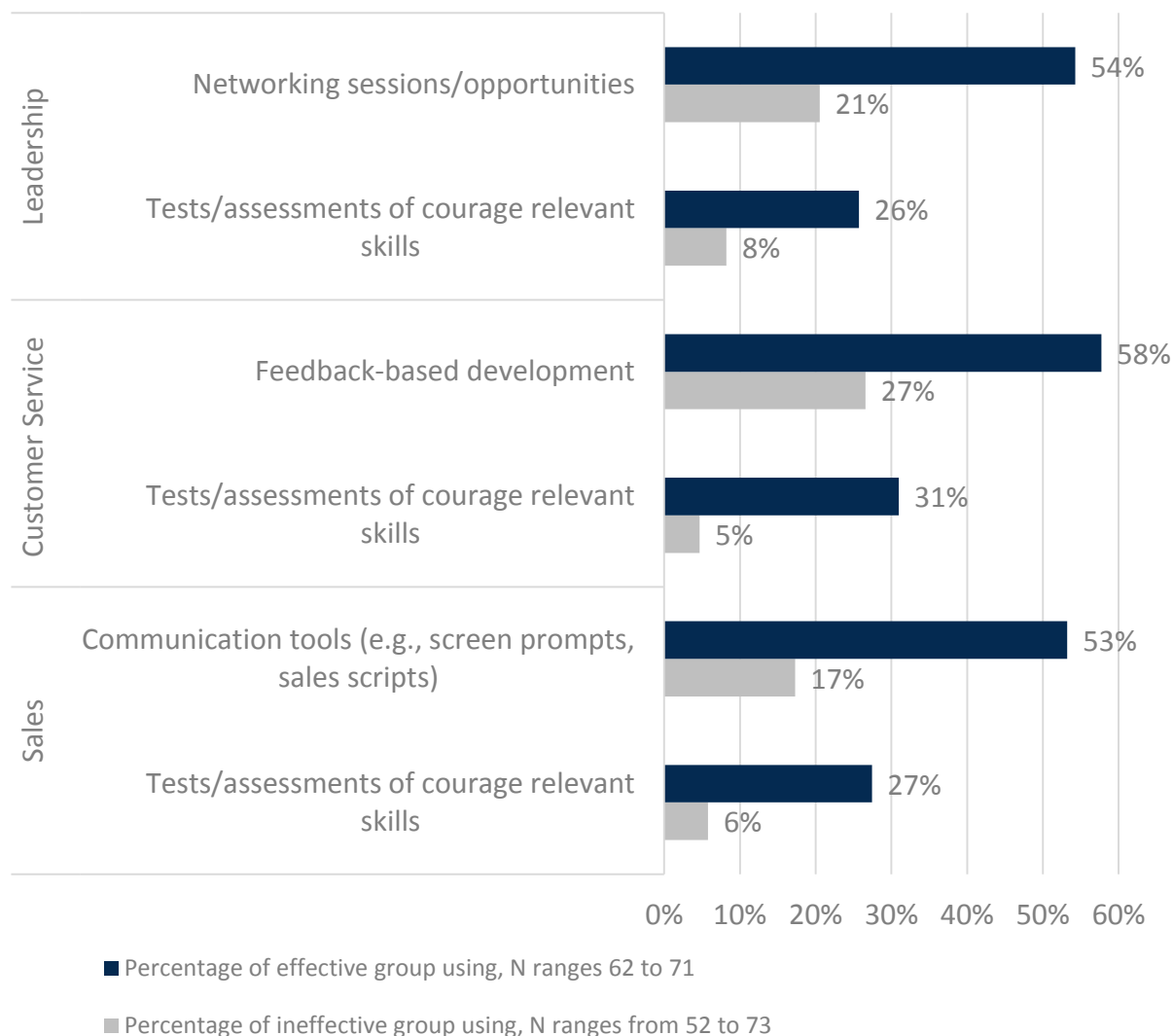
Table 1. Rank Order of Effective Groups' Use of Methods for Developing Courage

Method	Rank Order of Use		
	Leadership	Customer Service	Sales
Coaching or mentoring sessions	1	1	1
Team building	2	4	3
Instructor-led training (ILT)	3	2	2
Experiential learning (e.g., practical examples, case studies)	4	3	6
Networking sessions/opportunities	5	10	9
Communication tools (e.g., feedback protocols, coaching scripts)	6	6	5
Feedback-based development	6	5	6
360 degree evaluation	8	-	-
Personality assessment	8	-	-
Video	8	9	10
Short e-learning sessions	11	10	11
Observational assessment	12	8	8
Shadowing/on-the-job observation	12	6	4
Tests/assessments of courage relevant skills	14	12	12
SME access (e.g., mentor network)	15	14	13
Virtual-instructor led training (VILT)	16	13	14

Differences in the Effective and Ineffective Groups' Use of Methods

An examination of the differences in effective and ineffective groups' use of methods for developing courage provides further information about the approaches that contribute to effectiveness. Figure 8 displays the methods that exhibited the largest differences in usage across ineffective and effective groups. Across all three areas, the use of tests and assessments of courage was significantly related to effectiveness — **the effective groups in each functional area were between three to six and a half times more likely to use tests and assessments than were the ineffective groups**. In addition, the effective leadership group was *two and a half* times more likely to use networking sessions; the effective customer service group was *twice* as likely to use feedback-based development; and the effective sales group was *three* times more likely to use communication tools than was the ineffective group. That feedback-based development acted as a strong differentiator for customer service points to the importance of agility in customer service agents. Additionally, the observed differences in the use of communication tools for sales roles points to the utility of incorporating automated, feedback systems and coincides with market trends toward the incorporation of big data into tools for situation specific response and remediation.

Figure 8. Effective vs. Ineffective Groups' Use of Methods for Developing Courage



Methods for Developing Courage Scoring

Taken together learning leaders' ratings of effectiveness, and reports of using each of the methods for developing courage provide recommendations for the most effective approaches. In order to quantify these recommendations, a simple weighting scheme was developed and applied to the observed use and effectiveness ratings. The inverse rank orders of each were added across areas, such that each method received a score between 1 and 14 for each functional area based on the frequency with which the effective group used the method. Likewise, each method received a score between 1 and 14 to reflect the rank ordering of the percentage of learning leaders rating the method *very effective* for developing courage within each functional area. For example, coaching/mentoring was the most frequently used method of the 14 methods common across each functional area. Therefore, the usage score derived for coaching/mentoring is equivalent to 42 ($14+14+14 = 42$). Similarly, coaching/mentoring was rated *very effective* for developing courage in sales and leadership teams by

the largest percentage of learning leaders and was rated *very effective* for developing courage in customer service roles by the fourth largest percentage of learning leaders. Therefore, coaching/mentoring received an effectiveness score of 39 (14+14+11 = 39). Table 2 displays scores for each method. While **coaching/mentoring, team building, and instructor led training (ILT) were used most frequently, coaching/mentoring, shadowing/on-the-job observation, and experiential learning were considered most effective across all job areas**. The table highlights areas where use and effectiveness are not entirely aligned. For example, both shadowing/on-the-job observation and feedback based development were within the top four methods in terms of effectiveness, but were not as likely to be used. Similarly, team building and instructor-led training were in the top three most frequently used methods, but were not considered as effective as other methods for developing courage.

Table 2. Methods for Developing Courage – Use and Effectiveness Scores

Method	Use Score	Effectiveness Score
Coaching or mentoring sessions	42	39
Team building	36	26
Instructor-led training (ILT)	34	28
Experiential learning (e.g., practical examples, case studies)	31	37
Feedback-based development	30	36
Shadowing/on-the-job observation	29	38
Communication tools	25	19
Networking sessions/opportunities	19	15
Observational assessment	19	27
Video	15	9
Short e-learning sessions	10	5
SME access (e.g., mentor network)	9	17
Tests/assessments of courage relevant skills	9	15
Virtual-instructor led training (VILT)	4	4

Best Practices

Best practices for developing courage across all the functional areas included the provision of coaching with developmental feedback and cultural alignment with top-down support.

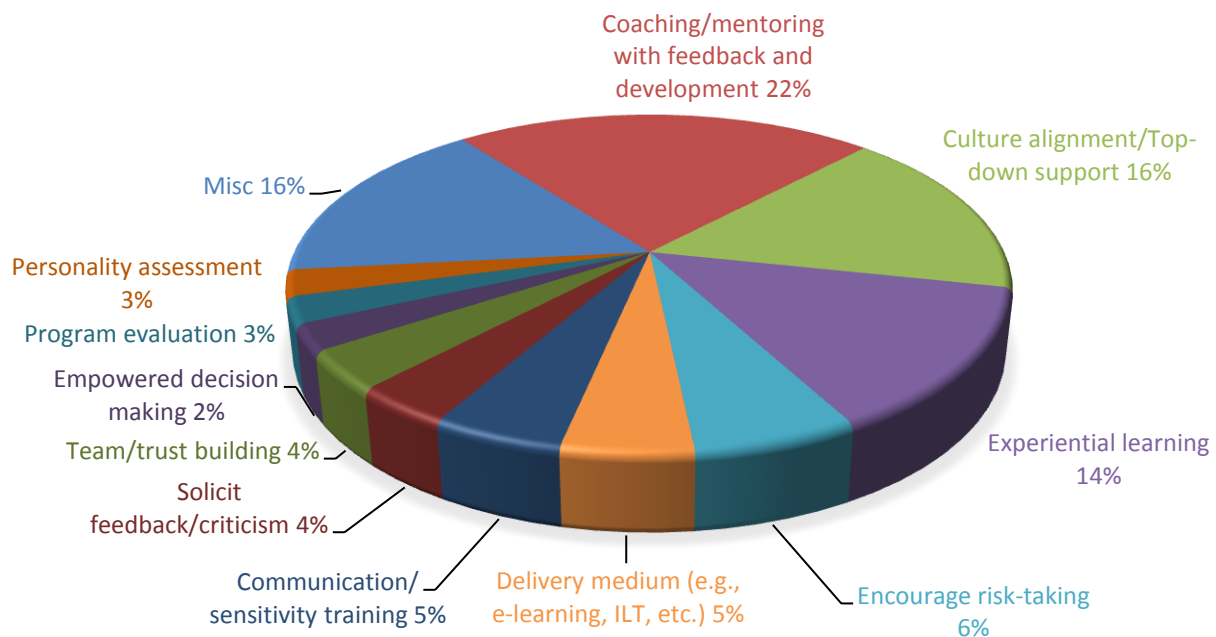
Learning leaders were asked to provide a best practice for developing courage in each of the three functional areas. Their comments tended to be similar across all areas. More specifically, they emphasized the importance of coaching and mentoring paired with feedback and development, creating a culture that supports courage with explicit top-down support, using experiential learning, and

providing communication training. The following provides more information about the content of their comments within each functional area.

Leadership

Learning leaders offered a variety of best practices for developing courage within leadership. Looking across the comments, 11 main categories emerged, indicating that courage is perhaps not developed using one specific practice, but instead fostered through the alignment a number of best practices. Indeed, aligning culture and providing top-down support for developing courage were frequently offered as best practices. Other frequently cited practices included the provision of coaching or mentoring paired with feedback and developing, the use of experiential learning and encouraging risk taking.

Figure 9. Percentage of Best Practice Comments Offered for Developing Courage in Leadership

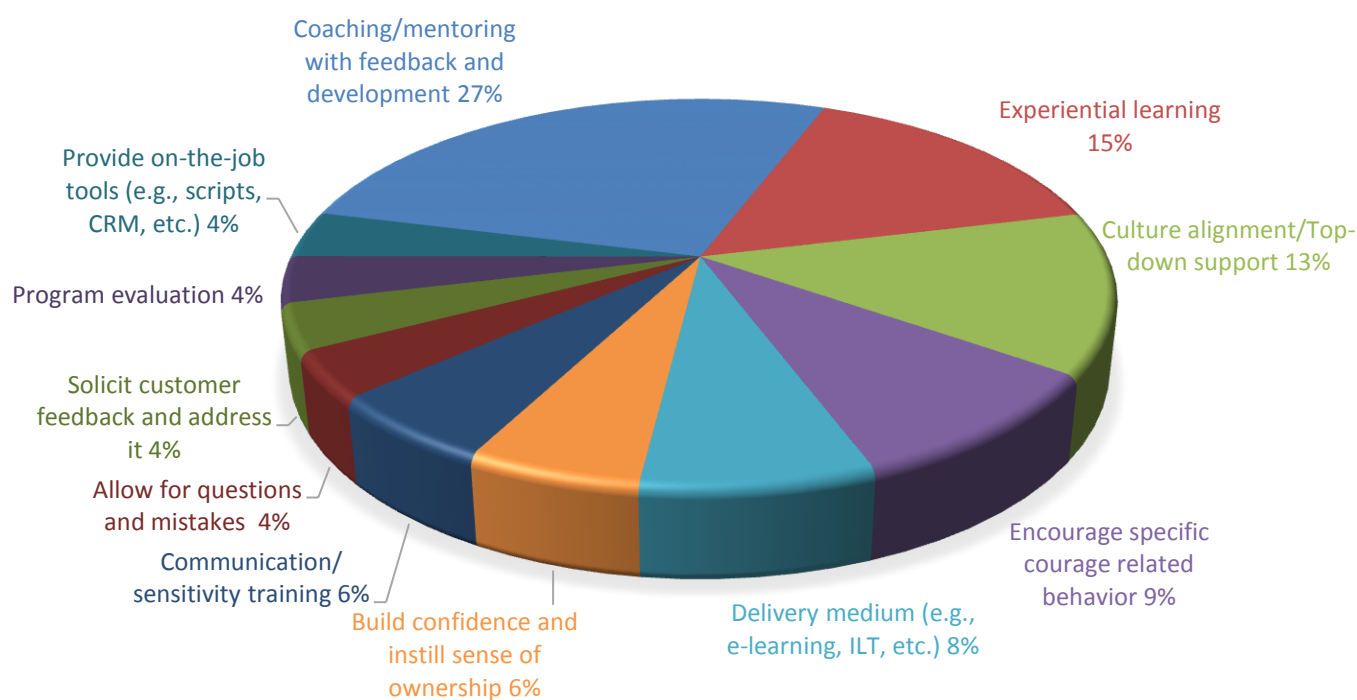


Percentage of Comments, N = 80

Customer Service

Similar to best practice comments for developing courage in leadership, learning leaders provided a variety of best practice suggestions for developing courage in customer service roles (see Figure 10). Coaching/mentoring with feedback and development was the most frequently cited best practice, followed by the use of experiential learning, and the alignment of culture with top-down support. These comments provide further confirmation of the importance of coaching, culture and experiential learning. Further, the variety of comment categories, again, point to the importance of aligning multiple practices to support courage.

Figure 10. Percentage of Best Practice Comments for Developing Courage in Customer Service



Percentage of comments, N = 64

Sales

As with the other two functional areas, learning leaders provided a mix of comments regarding best practices for developing courage in sales team members, with coaching/mentoring topping the list (see Figure 11). Other frequently reported best practices included emphasizing specific courage related sales behaviors, ensuring cultural alignment with top-down support and providing experiential learning.

Figure 11. Percentage of Best Practice Comments for Developing Courage in Customer Service



Percentage of comments, N = 68

Importance of Top-down Support

An overwhelming finding, arising from best practice recommendations in each functional area, was the need for cultural alignment and top-down support. To further explore the role of leadership in developing courage, an examination of the types of courage relevant sales and customer service acts reinforced most frequently by organizations that effectively develop courage within leadership was conducted. Figure 12 displays the percentage of the effective leadership group that reinforces key customer service and sales courage behaviors. Notably, **organizations that effectively develop courage in their leadership teams were two and a half to seven times more likely to reinforce these courageous acts in their sales and customer service teams.**

Figure 12. Percentage of Effective Leadership Group Reinforcing Key Customer Service and Sales Acts



■ Percentage of effective leadership group, N ranges from 45 to 63

Summary

Organizations depend on their employees to display courage on the job. Results of this study confirm the **essential nature of courage to leadership, sales, customer service and human resource roles**; more than half of survey respondents indicated that courage was *very important* in each of these functional areas. Given its critical nature, effectively developing courage within the workforce is essential.

Learning leaders were split in their ratings of their organizations' effectiveness at developing the skills to display courage on the job. Forty-four percent rated their organizations *effective* or *very effective* in all three functional areas for which courage was considered most important: leadership, customer service, and sales; leaving 56 percent indicating that their organizations were less effective in one or more of these areas.

Approaches that differentiate effective and ineffective organizations provide fruitful suggestions for the most effective strategies for developing courage in these functional areas. Effective organizations reinforce all acts of courage more frequently than ineffective organizations. Specifically, **effective organizations tended to emphasize taking responsibility and considering alternative perspectives or solutions**. Within leadership roles, reinforcing insistence on core principles during leadership training was also a key differentiator. For customer service confidence and sensitivity in customer handling was reinforced far more frequently by the effective group. Finally for sales, the frequency with which training programs reinforced exploring new business and applying new skills strongly differentiated effective and ineffective organizations.

Beyond the types of courageous behaviors typically emphasized during training, the methods used to develop courage also play a role in determining effectiveness. Results reveal several methods that, when used, are likely to result in greater courage outcomes. **The provision of coaching and mentoring paired with developmental feedback is clearly imperative**. Both best practice suggestions and survey responses regarding coaching and developmental feedback supported their use. Similarly, best practice suggestions and survey responses supported the use of experiential learning, shadowing/on-the-job observation, tests and evaluations of courage, and networking opportunities.

Best practice recommendations provided additional recommendations for effectively developing courage. In all three areas, **cultural alignment and top-down support** were frequently recommended. Further, the sheer number of comment categories produced as best practices in each functional area provide evidence for the strong importance of aligning a number of different practices to promote courage on the job.

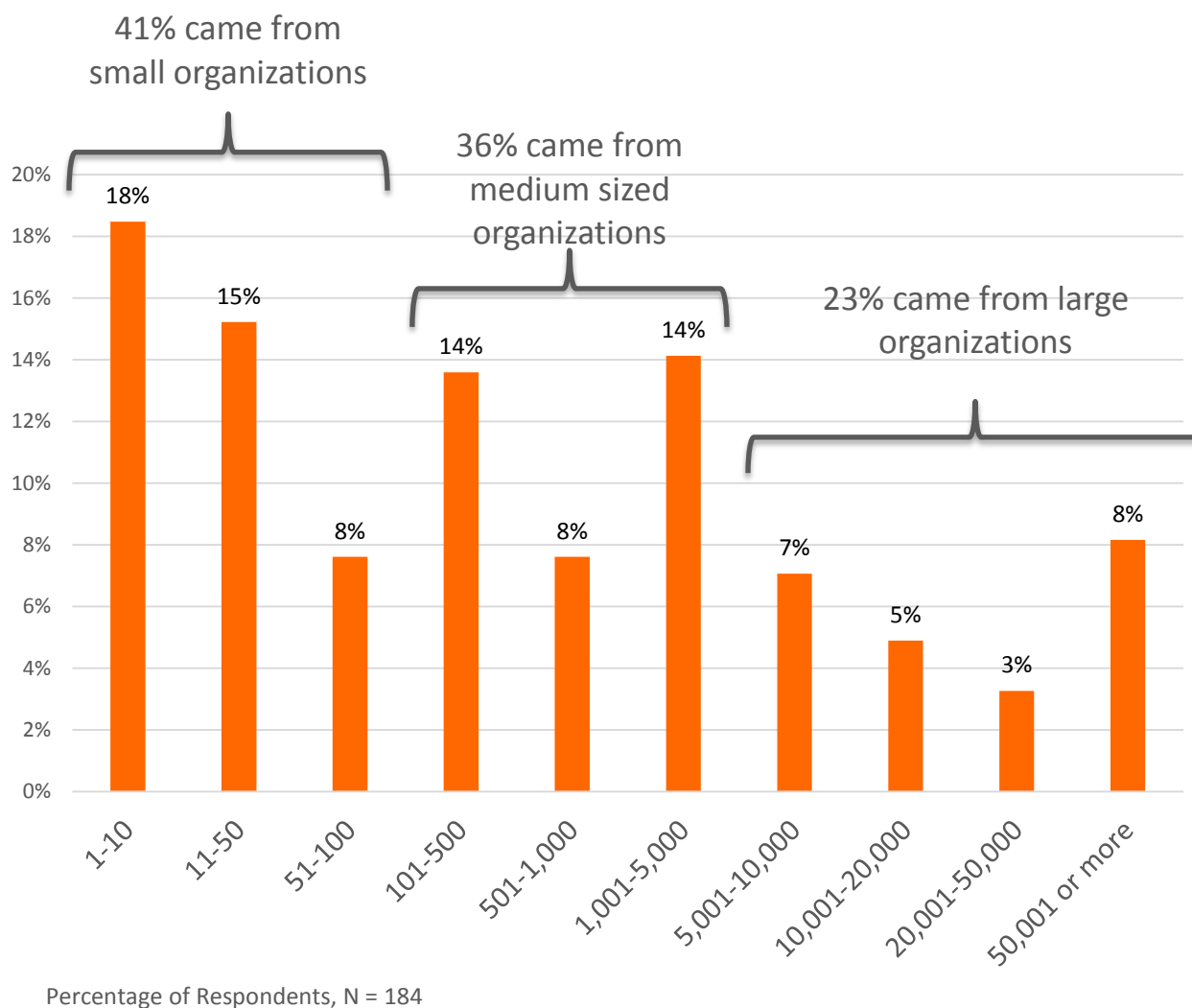
Demographics

The following provides information about respondent's demographic characteristics.

Company Sizes

Approximately 41 percent of respondents came from small organizations, 36 percent came from medium sized organizations and 23 percent came from large organizations (see Figure 13).

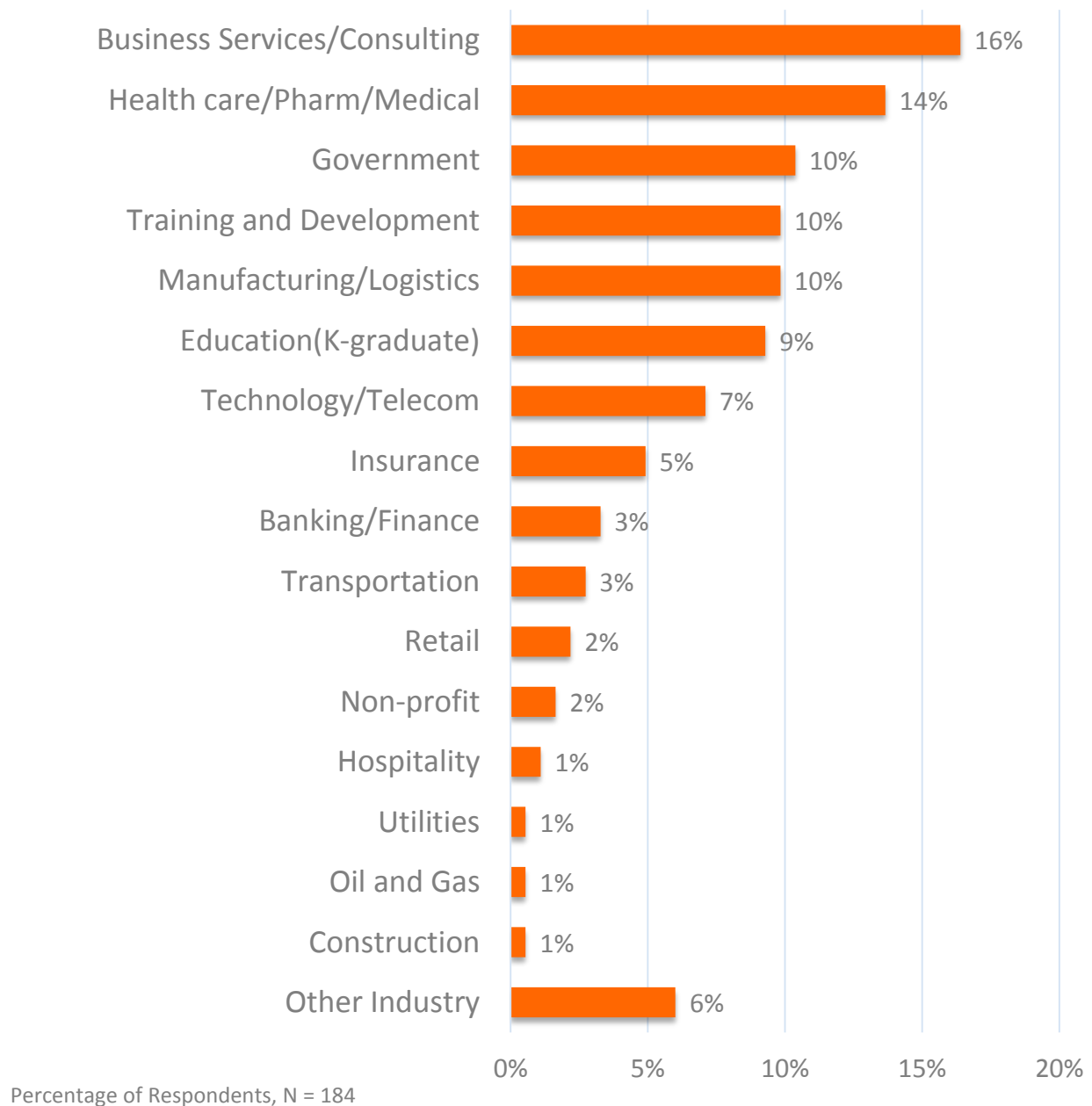
Figure 13. Company Sizes Represented in the Study.



Industries Represented

Approximately 69 percent of respondents represented the top six industries, including business services/consulting, health care/pharmaceuticals, government, training and development, and manufacturing/logistics (see Figure 14).

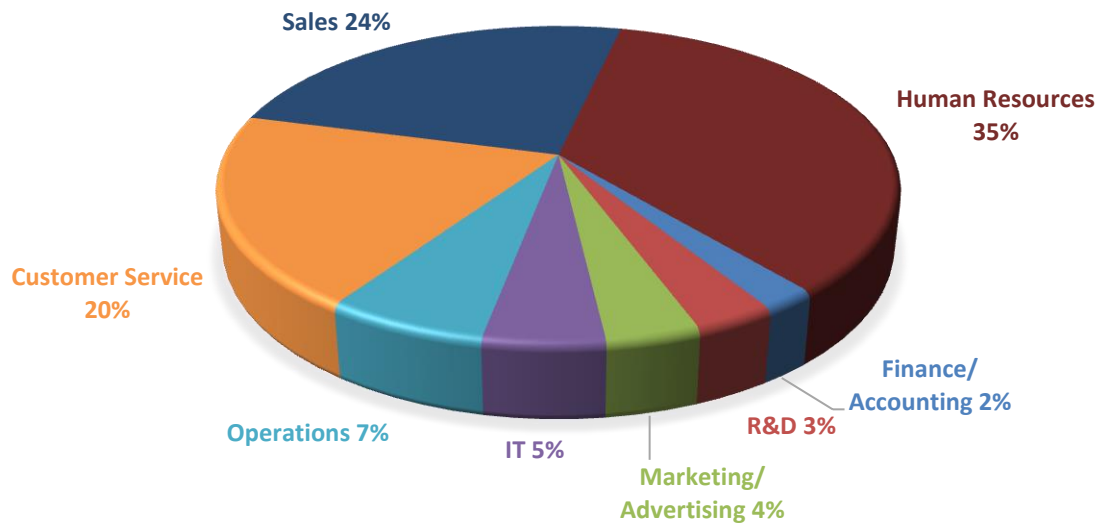
Figure 14. Industries Represented in the Study.



Department

The majority of respondents held positions in human resources, sales, and customer service departments (see Figure 15).

Figure 15. Departments Represented in the Study.

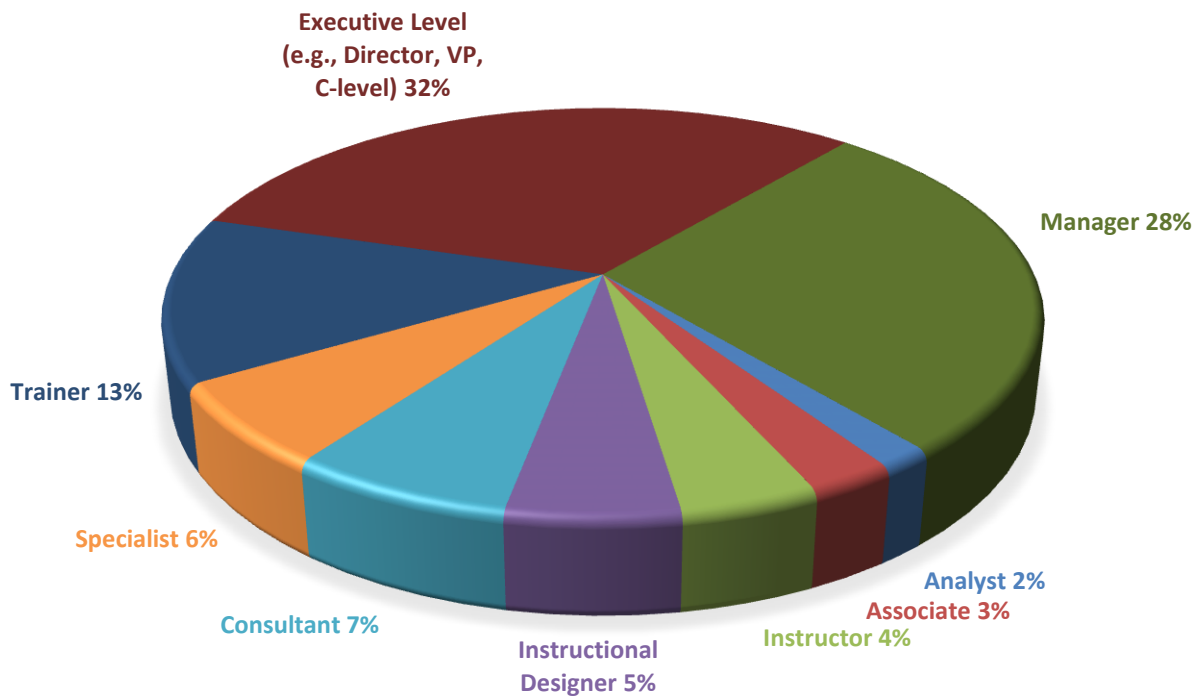


Percentage of Respondents, N = 184

Job Roles

Approximately 60 percent of respondents held leadership titles (management or executive-level roles; see Figure 16).

Figure 16. Job Roles Represented in the Study.



Percentage of Respondents, N = 184

About this Report

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