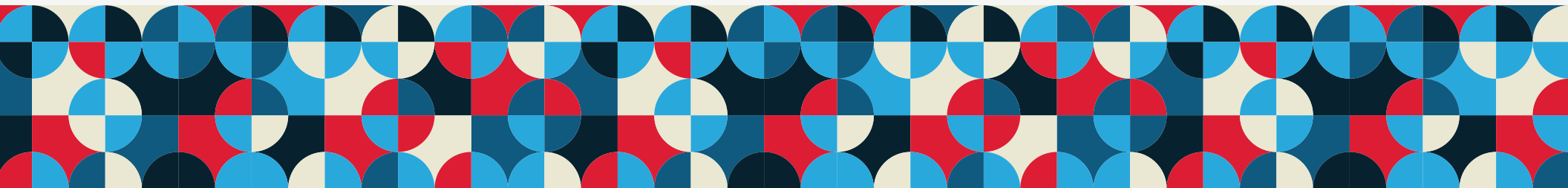


BENCHMARK REPORT

# Adapting to thrive during COVID-19

Presented by

*crew* 



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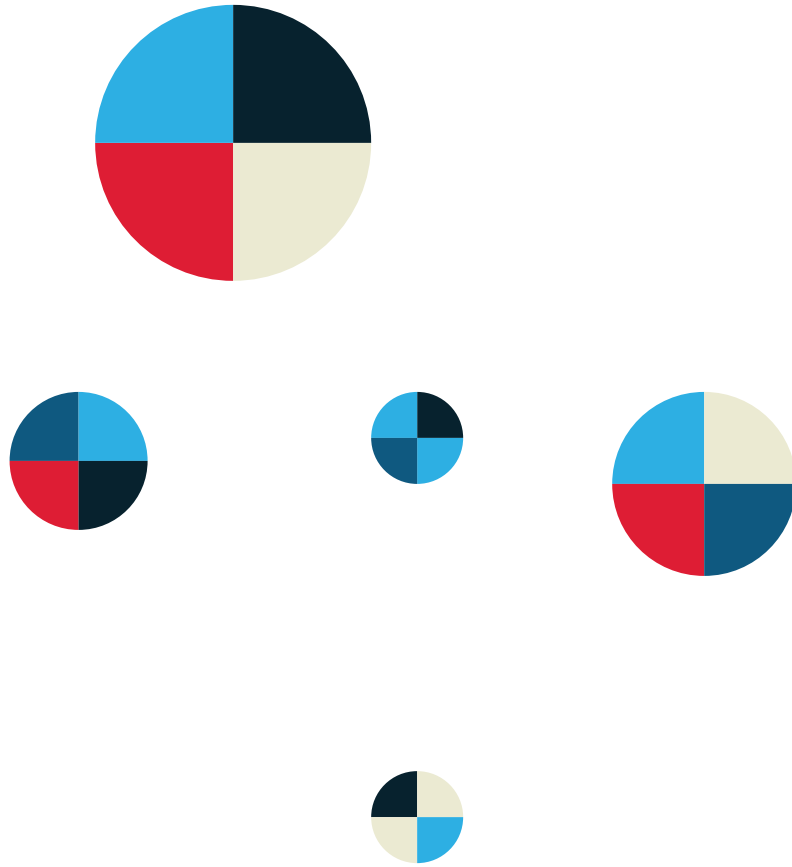
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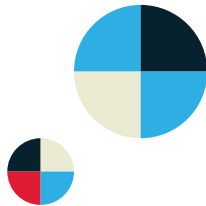
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## Overview

The COVID-19 pandemic is requiring business leaders with large frontline operations—from grocery stores, restaurants, and retail establishments, to hospitals, assisted living facilities, and other healthcare organizations—to rethink how they support essential frontline workers through better communications, updated training, flexible scheduling, and more. To get more insight into how companies are navigating this health crisis, adopting new best practices, and preparing for the future, we surveyed senior management and frontline teams from a variety of these businesses.

This report covers the most relevant findings from our research.

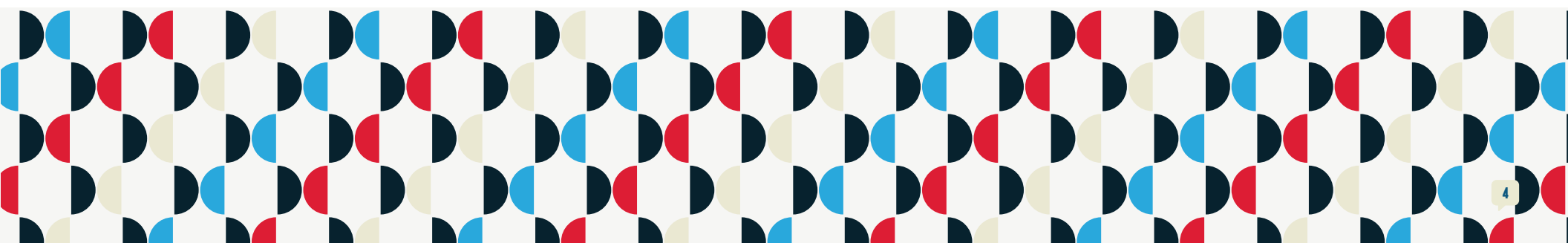


### KEY TAKEAWAYS:

- 1 The frontline gets top marks for agility.** When asked who was the most adaptable segment in their workforce during COVID-19, twice as many respondents selected frontline employees as compared to any other group. The single most popular reason they gave for frontline agility was having supportive and understanding managers and teammates.
- 2 Employee communication is mission-critical during a crisis.** Respondents said communication with frontline teams was the practice that had the most positive impact during COVID-19, especially in the healthcare sector. Specifically, all employees across the organization find themselves communicating more with frontline managers, primarily about safety guidelines and procedures.
- 3 Training helps workers keep up with constant change.** Half of the people surveyed attribute new training practices or materials as contributing to their organization's effective response to COVID-19, and most say that learning management is a top priority for planned technology investment.
- 4 COVID-19 is catalyzing essential technology adoption.** Business leaders recognize the importance of embracing new real-time, digital solutions to help their workforce continue adapting well to future phases of the pandemic. More than half of all companies surveyed, including 65% of retailers, are investing more in employee technology.

# In depth: Ranking operational response to COVID-19

This benchmark study hones in on how employees and managers at all levels of an organization feel about their company's response to COVID-19, operational practices, and future technology priorities. The following pages include specific insights about each of these topics. In particular, we uncovered several commonalities and differences among employees in the food service, healthcare, and retail segments, as well as between frontline teams (e.g., associates, shift leaders, and floor managers) as compared with senior management (district or area directors, senior staff, and executives).



## Employers have the confidence of their employees

In general, the majority of the people we surveyed believe their organization has responded well to COVID-19:

- 82% score their business' response as "ideal."
- 74% remain confident or very confident in the company's ability to navigate the ongoing demands of the pandemic going forward.
- 62% trust their employer to do the right thing moving forward related to the pandemic.

This is promising, since [Ernst & Young's pre-pandemic research](#) found that less than half of workers had a "great deal of trust" in their employer, boss, or team/colleagues. When drilling down into a variety of operational dimensions, we saw the most positivity surrounding businesses' handling of employee safety during COVID-19. Overall, 90% of respondents — across all roles and nearly every industry — said their company's response in this particular area was ideal.

### KEYS TO SUCCESS

Do you consider your organization's COVID-19 response to be ideal in these specific areas?



### TOP RESPONSES

#### AMONG SENIOR MANAGERS



#### AMONG FRONTLINE TEAMS



## CONFIDENCE IN THE FUTURE

### Haves and have-nots

That said, there is a marked difference between industries in how confident employees feel about the future and their employers' ability to navigate the crisis. Respondents are more upbeat in industries where demand remains strong (such as food services) and in sectors such as healthcare, where demand has spiked.

	NOT CONFIDENT	NEUTRAL	CONFIDENT
FOOD SERVICE	2%	20%	78%
HEALTHCARE	0%	26%	74%
RETAIL	0%	41%	59%

Retail, on the other hand, has been hard-hit by the pandemic, and unsurprisingly only 59% of respondents report being confident in the future.

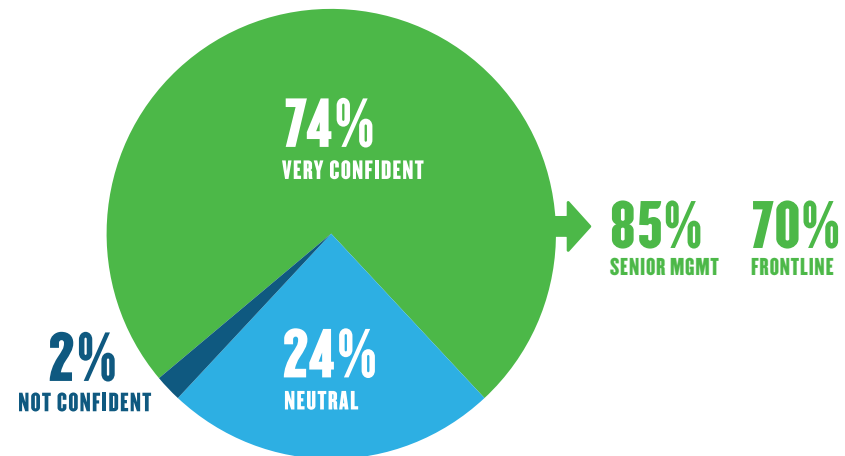
As compared to other industries, these leaders give their organizations somewhat lower scores for speed of response (76% ideal), overall customer experience (76% ideal), and customer communications (65% ideal).

### Experience varies significantly by role

While marks for performance are generally high, frontline teams remain a bit more skeptical. They are 15% less likely to claim confidence in their company's preparedness than senior management (70% vs. 85%), and only 79% score their organization's overall response to COVID-19 as 'ideal,' compared to 89% of corporate leaders. While 94% of management give their company top marks in areas like internal communications, only 72% of frontline teams agree.

### ORGANIZATIONAL CONFIDENCE

How confident are you in your organization's ability to navigate the COVID-19 pandemic successfully?



## Your frontline is the most adaptable workforce segment

When asked which segment of their organization initially adapted best to the COVID-19 crisis, most respondents selected frontline employees, with frontline managers coming in second—a good sign, since in many businesses, an overwhelming majority of the workforce is made up of these frontline leaders and the employees they oversee.

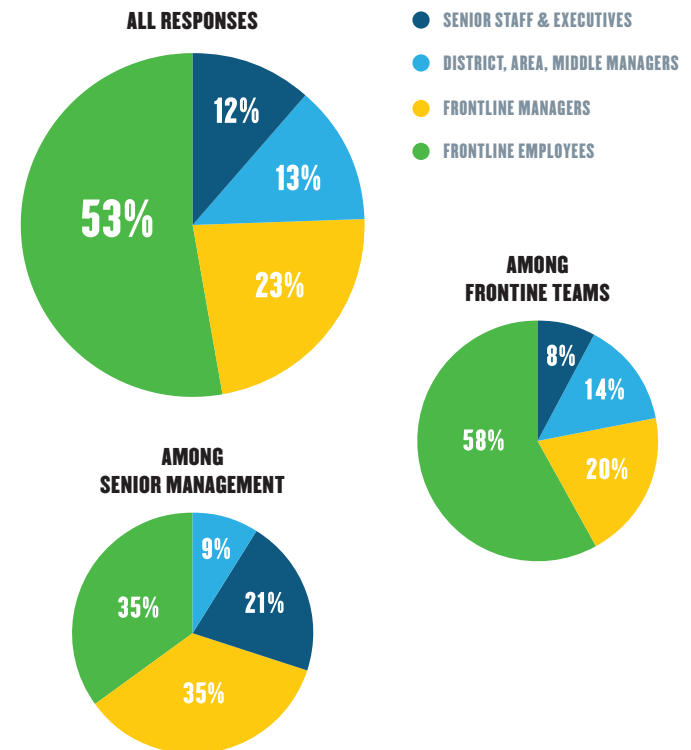
Of course, frontline teams had little choice but to adapt. In the midst of the pandemic, they were asked to perform essential roles and keep their organizations—and our society—running. Our findings suggest a widespread belief that these individuals rose to that challenge. Interestingly, within retail and grocery organizations, frontline managers were considered most adaptable by 41% of respondents, likely because of their pivotal role in overseeing evolving customer-facing procedures like new sanitation requirements and contactless transactions.

Senior leadership fared less well. Fewer than 12% of our respondents believe their CEO and senior executives adapted best. This mirrors findings from the most recent [Edelman Trust Barometer](#), which found that only 29% believe CEOs are doing an outstanding job handling demands placed on them by the pandemic. In the food service industry, only 6% feel their senior staff is the most adaptable, possibly because frontline employees have limited access to leaders outside of those in their immediate region.

Notably, other senior management were almost three times more likely to indicate that their executive team had adapted best, suggesting a disconnect between corporate leadership and frontline teams during the crisis. This can be a difficult gap to bridge in the best of times. Now, it's proven to be even more challenging as organizations explore new digital avenues to replace lost in-person connections.

### FRONTLINE ADAPTS

Which segment of your workforce do you think has adapted best to the current climate?



## Healthcare leaders step up

The healthcare industry provides a noteworthy exception to reservations around senior leaders' agility. In this sector, 22% rated senior leaders as the most adaptable, more than double the average in other industries, which was 8%. This reflects the vital and highly visible roles senior healthcare officials have played during the pandemic—from managing operational challenges like personal protective equipment (PPE) shortages, to providing guidance on safety precautions both to their employees and the community more broadly.

[The Harvard School of Public Health](#) studies the unique challenges facing healthcare leaders, which have only been amplified during the pandemic.



**Our shipment of new PPE supplies has arrived!**

**Yes! Thank you!**



***“The challenge for [healthcare] leaders is to deploy influence, often beyond their formal authority, to foster unity of purpose and effort. The secrets to success are communication, coordination, and collaboration.”***

— Eric McNulty / Co-Director / Harvard's 'Leading in Health Systems' program



### Top drivers: Knowing how and knowing who (to turn to)

Respondents said the most important factors helping employees adapt to the crisis were having supportive and understanding managers and teammates, followed by effective training. The latter was particularly pronounced in healthcare organizations. Among long-term care, hospitals, and other acute care providers, 59% viewed effective training as the dominant contributor. This is not surprising given the precision required in their work. However in retail, more than 65% indicated team support as the key reason for employees adapting well.

#### NAVIGATING TURBULENCE

What are the top reasons you think these employees have adapted better than others?

56%

SUPPORTIVE MANAGERS & TEAMMATES



49%

EFFECTIVE TRAINING



32%

ACCESS TO TIMELY INFO



29%

HAVING AN AGILE MINDSET



18%

RECOGNITION

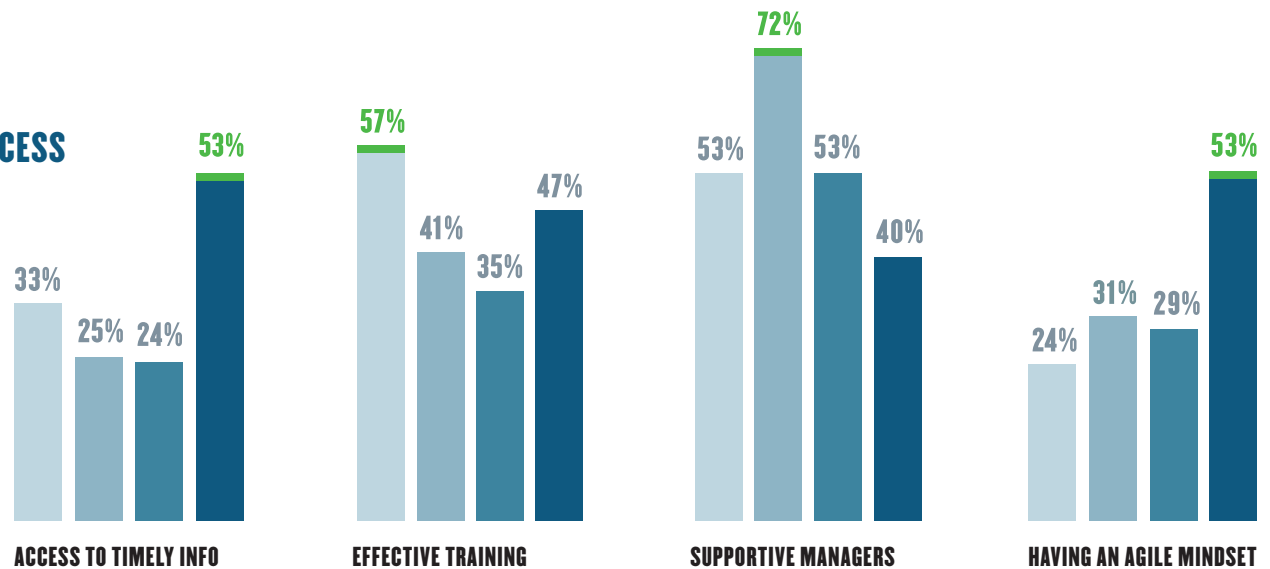


### For senior managers, mental agility proved more important

There was no training or manual to prepare senior leaders for 2020. As such, half of senior management—especially those in healthcare and retail—ranked an agile mindset as one of the pivotal factors contributing to success during the pandemic. Respondents who felt that senior staff adapted best were more likely to attribute an agile mindset or access to timely information as the biggest drivers. 86% who were in a senior management position themselves said agility was key, while 75% of the frontline respondents who chose senior staff as most adaptable felt it was due to having timely information.

#### TOP REASONS FOR SUCCESS

- FRONTLINE EMPLOYEES
- FRONTLINE MANAGERS
- MIDDLE-LEVEL MANAGERS
- SENIOR EXECUTIVES



## Keys to ensuring effective operations during crisis

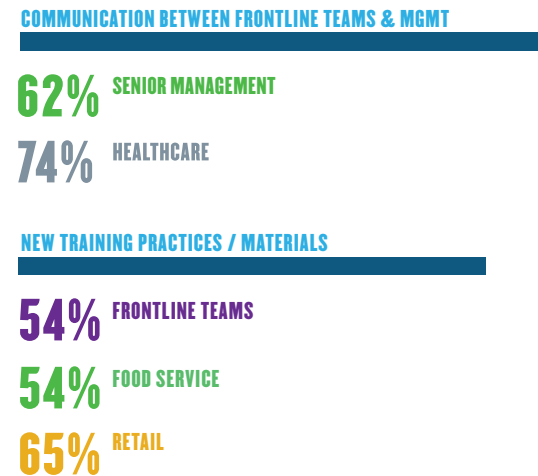
Broadly speaking, three key factors emerged that are helping businesses navigate the COVID-19 pandemic successfully. Respondents clearly recognize the critical role that [internal communications](#), [employee engagement](#), and training programs have played in supporting flexible operations.

### OPERATIONAL BEST PRACTICES

Which best practices have had the most positive impact on your organization's response to COVID-19?



### TOP RESPONSES BY ROLE AND INDUSTRY



## Employee communications

**Communication between management and frontline teams has proven to be the most important muscle helping companies successfully manage the pandemic.**

The realities of COVID-19 have made it crucial for this process to happen in real-time through digital, always-on channels. This is especially notable among healthcare organizations, of which more than 73% rated communication as one of their most impactful practices.

Of course, this sector is most likely to experience blowback if frontline caregivers are left out of the loop or don't get the information they need. Unfortunately, according to Gallup, [19% of healthcare professionals](#) feel their employer has communicated too little about COVID-19.

Of all the frontline employees and managers we interviewed, 48% gave their company's internal communications top marks, which benchmarks higher than [another Gallup poll](#), in which only 41% strongly agreed that their company was keeping employees well-informed during the crisis. When we specifically asked frontline teams whether employer communication about the pandemic was timely and effective, 60% agreed but 22% disagreed.

Open dialogue between various levels of your workforce is often the first aspect to break down during times of high stress. While 85% of senior management believe they're doing a good job of listening to employee feedback during the pandemic, only 66% of frontline teams feel that they have an effective way to communicate concerns to their employer.

“Sustained two-way engagement helps you become aware of potential vulnerabilities before an issue triggers your looking for one,” said [Associate Professor Keith O. Hunter](#) at the University of San Francisco. “Having robust communication up and down the line is one way leaders can improve their ability to see upcoming challenges or threats from further away while there is time to course correct or make preparations.”

***“Communication is so important at every level of our business— from corporate down to the frontline, from store managers to their teams, and between departments and co-workers.”***

— John Vining / Director of HR / ShopRite operator [Brown's SuperStores](#)

## BEST PRACTICES

Across industries and roles, there's no doubt that everyone is communicating more with everyone—but frontline managers are receiving the most additional communication from all other levels (78% are communicating more with this group). This aligns with recent findings from the [Institute for Public Relations](#), which notes that two of the most effective channels for communication are direct communication through supervisors or managers (61% rate it very effective) and one-on-one check-ins (76%). This speaks to both the outsized importance of floor managers and the myriad demands placed upon them.

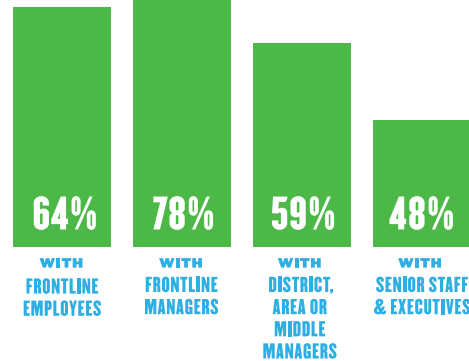
“Senior leadership does a good job of communicating daily during a crisis but there is something about getting information from the people you work with every day and trust. People feel better if they can ask questions directly of someone they feel comfortable with,” said [Geoffrey D. Rubin, Duke University](#).

Be careful, however, not to over-rely on your frontline managers for communication. A cascade-only approach can place excess burden on them and result in a breakdown of information flow, since frontline managers are often the most overburdened and over-taxed individuals in your organization. To ensure that the right communication is reaching your associates, clerks, or

caregivers, complement communication from their direct managers with more immediate modes of communication from the corporate office. Empower senior management and executives to reach all frontline employees directly, while providing avenues for communication to quickly flow back up the chain.

## TIME SPENT COMMUNICATING

Since COVID-19, do you find yourself spending more time communicating with the following types of employees?



**88%** OF   
**SENIOR MANAGEMENT**  
say they're communicating more with frontline managers.

**44%** OF   
**FRONTLINE TEAMS**  
say they're communicating more with senior executives.

**39%** OF   
**FOOD SERVICE LEADERS**  
say they're communicating more with senior executives.

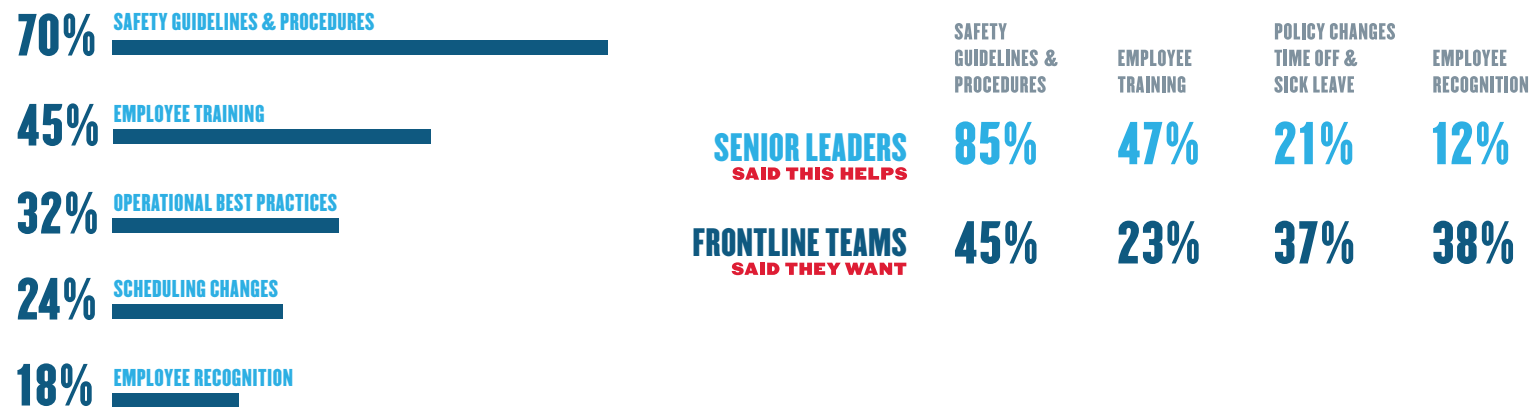
## BEST PRACTICES

### Meaningful communication

Not surprisingly, information about safety procedures and guidelines was selected as one of the three most helpful types of internal communications by 70% of respondents. This was followed by 45% who emphasized employee training content, and 32% highlighting details about operational best practices. Yet, when we asked frontline teams what type of information they'd like to see more of going forward, we found that 37% wanted more communications around policy changes related to time off and sick leave, and **38% were clamoring for employee recognition**—especially amongst food service and healthcare workers. Other specific requests included information from employers about possible COVID-19 exposure incidents, testing options, and store-specific procedures or opening updates.

## TYPES OF COMMUNICATION CONTENT

What types of communication have been most helpful in navigating COVID-19?



## Employee engagement

The findings above—especially the fact that 56% say those who have adapted well during COVID-19 have done so because of understanding teammates and managers—point to the importance of cultivating a supportive, engaged culture in times of high stress. It's essential to remember the role of team-building and company values even and especially during a crisis. In the early stages of the pandemic, Gallup found that [employee engagement had reached a record high of 38%](#), but that number has more recently dropped to only 31% as disruption, social discontent, and uncertainty persist. 54% of U.S. workers, especially those on the frontline, are simply 'not engaged,' meaning they might show up to work, but will probably put in the minimum effort required.

In some industries, like food services, the impact of engagement is even more pronounced. Research from [Black Box Intelligence](#) notes that restaurant managers with engaged teams report 41% lower absenteeism, 70% fewer accidents, a 24% decline in turnover and, conversely, 24% higher productivity and 20% greater sales.

*“We noticed a huge difference when we started sharing the daily cleaning checklist so every store sees it. Teams quickly engaged by posting pictures of what they had cleaned. Not only does that get people motivated, it gives them that little sense of competition, and changes the culture.”*

— Sherry Houston / COO / Houston Enterprises (KFC franchise group)

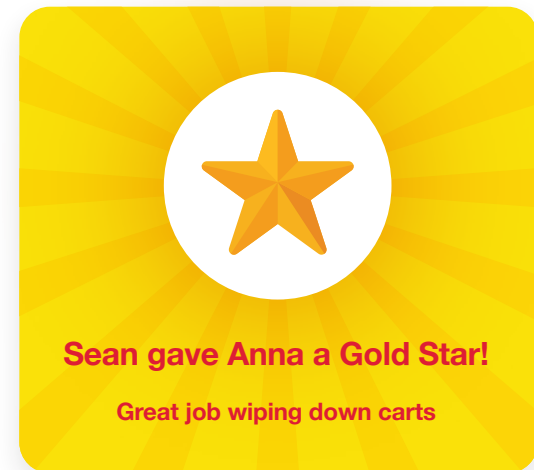
### Employee recognition

**Of course, recognition is a major driver of employee loyalty.**

[Cathy Blankman, growth leader at Taco Bell franchisee](#) K-Mac Enterprises, pointed out that recognizing the extra effort people put in or the exemplary job they do on different tasks cascades down, until the act of recognizing good work and spreading positivity extends throughout every level of the organization. And, according to research by the [WorkHuman Institute](#), employees who have been recognized in the past month are twice as likely to see a path to grow in the organization, and **69% reported that they would work harder if they felt their work was recognized.**

Unfortunately, recognition is also the easiest responsibility for managers to overlook when under pressure.

- Only 18% of our respondents indicated that employee recognition content has been helpful during COVID-19. Among senior management, that percentage dropped to just 12%, compared to 21% of frontline teams.
- Recognition ranked in the bottom three responses to the question of ‘Why have employees adapted better during COVID-19?’ 18% selected ‘recognition from managers’ (but only 11% at healthcare organizations), and a mere 9% chose ‘recognition from peers.’





## Flexible scheduling

Another factor that can fuel employee engagement, especially in frontline-centric businesses, is flexible scheduling options. This is even more crucial in the middle of the current health pandemic, which dramatically impacts people who are immunocompromised or caring for someone who is. Employee turnover is expensive, so there's value in keeping workers connected to your organization, no matter their circumstances or current availability. To help with this, businesses should offer easier ways for staff to swap shifts, as well as more flexible working hours—something that 86% of HR leaders say they're doing, according to a recent study by the [Society for Human Resources Management](#).



***“A big challenge lies in fast-changing scheduling requirements. Being able to adapt to these challenges and stay flexible is critical.”***

— Gary Hawkins / Founder & CEO / [CART \(Center for Advancing Retail & Technology\)](#)

Almost two-thirds of frontline teams say their employer has accommodated requests for more or fewer hours than usual depending on their circumstances, although 24% state the opposite. [Michael Spataro of Axsium](#) and [Mark Wales, a Workforce Institute board member](#), each offer helpful advice on how operators should think about balancing the needs of rapidly changing government regulations, wildly fluctuating consumer demand, evolving labor standards, and uncertain workforce availability.

## Workforce training

Another important trend we discovered in our research was operators' increasing focus on training. This is essential these days, since frontline employees must learn rapidly how to help their customers with the explosion of digital orders, contactless curbside pickup, and click-and-collect transactions. According to [S&P Global Market Intelligence](#), COVID-19 should accelerate brick-and-mortar retailer efforts to add workers in order to support new tasks and responsibilities surrounding these digital operations, while also ensuring a safe shopping experience in physical stores.

In our research, 50% of workers felt new training practices or materials had positively impacted their organization's response to COVID-19, and this number jumped up to 65% amongst retail businesses such as supermarkets, fitness centers, and hotels.

- 49% of respondents think that employees who adapted well to COVID-19 did so because of effective training.
- 45% say communication around training is one of the most helpful types of information the organization provides.
- 44% are prioritizing new employee technology to support training and learning management.

*“What it means to work in retail is going to change—that’s a pre-pandemic trend that the current crisis will simply accelerate.”*

— [Tracy Hadden Loh](#) / Fellow / [The Brookings Institution's Metropolitan Policy Program](#)

Digital tools are a great way to make sure your organization surpasses these benchmarks. For instance, [Harps Foods'](#) vice president of human resources, Frank Ray, noticed that once they added a mobile employee engagement solution, interest in career growth picked up. He shared, “We’re getting employees raising their hands now, saying that they see open opportunities out there and that they want to be trained in produce, grocery, deli. And they’re getting to learn new skills, and hopefully eventually rise up the chain.”

An ever-more critical area of training is helping your leaders across the organization to better communicate and stay agile during the continuing crisis. Dr. Martin Armstrong, vice president of payroll shared services at Charter Communications, recently noted on a [Workforce Institute podcast](#) that an overwhelming 80% of the workforce is made up of frontline leaders or the frontline employees who are managed and influenced by them. However, these leaders only receive 20-30% of a typical company's leadership development efforts and resources.

## Future-proofing with technology

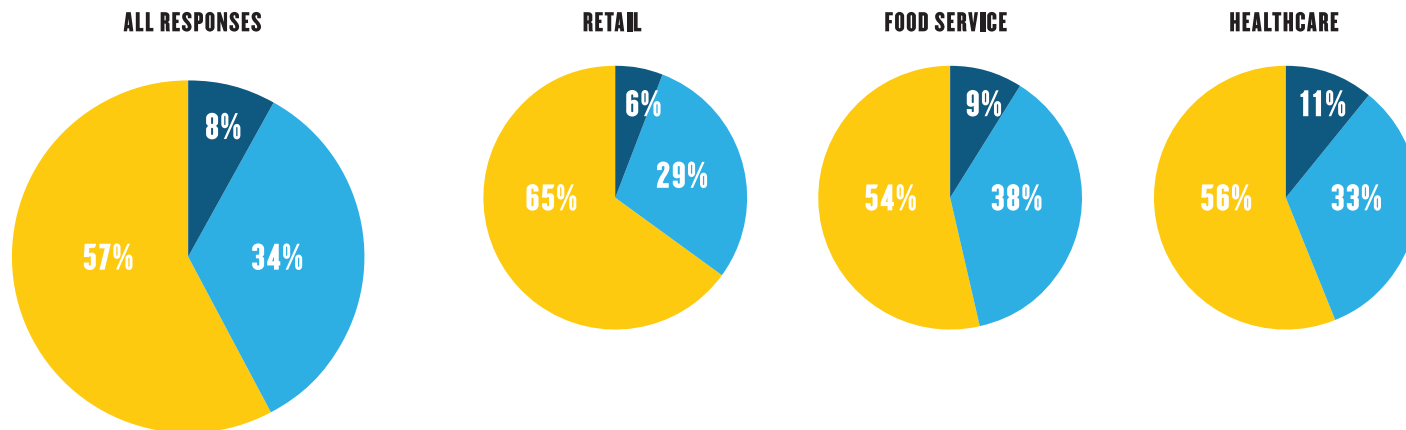
Each of the operational strategies described above can be amplified with the help of mobile-first applications that facilitate quick and easy real-time communication, stronger cross-organizational connections, and rich learning and development opportunities. That's one reason 70% of mobile and endpoint net new investments will be aimed at enabling frontline workers over the next five years<sup>1</sup>.

To find out if businesses agree, we asked respondents about their companies' technology investments and priorities for the future. Despite unstable economic conditions, leaders across all industries told us they're planning to invest more in employee-facing technologies over the coming year. Some of the highest levels of investment coming from competitive industries like retail, where 65% plan to invest more.

## TECHNOLOGY INVESTMENTS

How much more (or less) is your company planning to invest in employee technology as a result of COVID-19?

● INVESTING MORE ● INVESTING SAME ● INVESTING LESS



<sup>1</sup> Gartner, Hype Cycle for Frontline Worker Technologies, 2019, Rob Smith, July 31, 2019

## TECHNOLOGY ADOPTION

One of the key goals teams have is to adopt platforms that help get everyone on the same page with regards to new policies, procedures, and in-store tasks. In particular, investment in communication, collaboration, and intranet solutions topped the list of technology priorities, with over 68% of senior management indicating increased investment—and even more in healthcare and retail. Meanwhile, 51% of food service companies are prioritizing training and learning management solutions to meet their growing needs in this area.

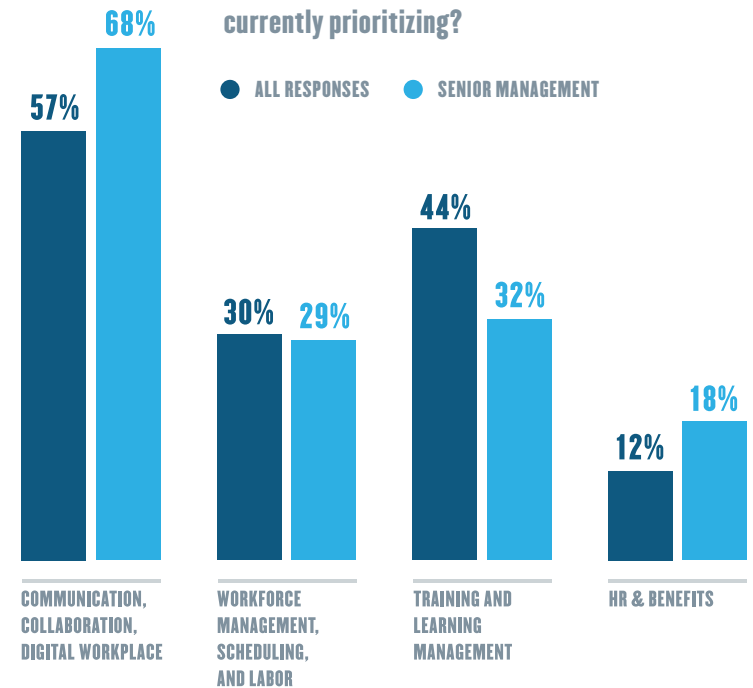
A recent [Ernst & Young report](#) on reopening noted, “As companies compete for key talent, more flexible ways of working that harness digital communication apps can improve work/life balance and meet employees’ personal preferences. Validating that the workforce is on a constant trajectory of training will enable a culture where no one is left behind as new technologies are embedded in business processes.”

*“The silver lining is that the crisis has really triggered and forced a large number of retailers to innovate, to really understand the role of technology and tech innovation and how it can be used to help their operations across nearly everything. I don’t think nearly enough industry executives truly understand the breadth, depth, and speed of change and transformation and disruption that’s coming at them.”*

— Gary Hawkins / CART

## TECHNOLOGY PRIORITIES

What kinds of employee technology are you currently prioritizing?

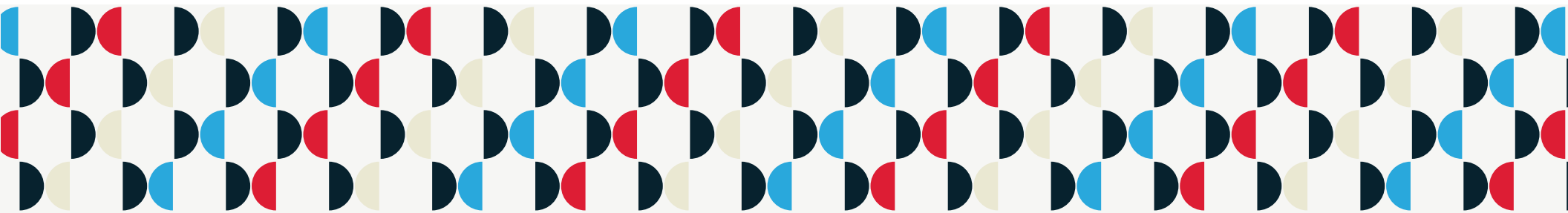


# Boosting agility during future pandemic phases

*“Leading companies will emerge from the current crisis with the motivation to reboot and rebalance. Leaders need... a different set of value drivers: putting humans at the center of their purpose; innovating at scale through ecosystems of partnerships and alliances; and deploying technology at speed.”*

— Dan Higgins / EY Global Advisory Technology Consulting Leader

Given all of the insights we uncovered above, it appears that many frontline service businesses are handling challenges surrounding COVID-19 as well as can be expected. However, no organization can afford to rest on its laurels at this pivotal point in the pandemic’s trajectory. In order to mitigate further disruption during the months and years to come, and actually take advantage of new digital opportunities emerging from this seismic shift, it’s paramount to reflect on your approach to communications and people operations, and look for new ways to strengthen agility and resilience.



## CONCLUSION

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Across Crew's customer base, we've noticed several best practices that are helping teams to not just survive these difficult times, but set themselves up for a future in which their business can truly thrive.

### TOP OPERATIONAL BEST PRACTICES DURING COVID-19

#### 1 Find a balance of top-down and bottoms-up communications.

It's more critical than ever to ensure important announcements can reach all of your employees rapidly. In fact, across Crew's customer base, we found that after COVID-19 started, the speed of communication consumption increased dramatically. 85% of messages are now read within one minute of being sent and 98% within an hour, as compared with 62% and 88% a year ago. In order to help manage your employees' fear, uncertainty, and doubt, it's crucial to not just get information across, but to listen to your workforce as well. Having a channel like Crew where frontline employees can reach management instantly is invaluable.

#### 2 Build lasting connections with frontline employees and managers.

Teammates can be a lifeline for essential workers dealing with both increased health risk and increased demands for their time. With an easy-to-use digital workplace, anyone in the organization can easily connect and engage by sharing stories, problem solving collaboratively, and getting the support they need.

#### 3 Foster engagement by increasing employee recognition.

During times like these, there are many time-sensitive pieces of communication that leaders have to disseminate quickly. But the best leaders still find time to publicly acknowledge quality work and frontline sacrifice in the face of daunting new challenges. This helps your frontline feel more connected to the organization, to each other, and to back-office leaders who might now be working from their homes. Many of our customers tell us that Crew's public recognition module gives them an easy way to recognize and motivate quality performance.

#### 4 Digitize scheduling and training processes to keep up with dynamically changing needs.

Another way to up your game is to provide frontline employees with a mobile app that puts their schedules and timely training reminders in the palm of their hands. Solutions like Crew let people know in an instant when they're needed at work (or when there might be a new store closure or opening), and even gives them handy ways to request shift coverage or swap shifts as needed. Many leaders also use Crew to share videos or regular updates about new sanitation procedures and other requirements so that everyone can stay on top of ever-changing tasks.

*“When COVID first started, there were operational changes daily, sometimes more than once a day. These were serious changes about masks, how we had to handle product, what we needed to disinfect, supply chain issues, and store closures. It was invaluable to be able to send updates to the entire team instantly and see who saw them. I can’t imagine how we would have done that without Crew.”*

— Sherry Houston / COO / KFC franchise group - Houston Enterprises



# Methodology

**Crew** conducted global online surveys of more than 600 store operators and their frontline teams from June 22 through July 6, 2020 and July 23 to August 18, 2020. These studies garnered insight into how a variety of organizations are navigating COVID-19, adopting new best practices, and preparing for the future. Respondents included owners, chief operating officers, vice presidents, district managers, area directors, general managers, and associates. For the purposes of our analysis, we grouped responses from frontline teams—including associates, clerks, caregivers, shift leaders, and floor managers—and from senior management—district or area directors, middle managers, senior staff, and executives. Our research spanned industries such as assisted living, education, food service, grocery, healthcare, hospital, hotel, travel, tourism, fitness, beauty, personal care, professional services, and other retail organizations ranging from 50 to 5,000+ employees.



Crew is a mobile-first frontline app that helps companies streamline communication, scheduling, training, and more across large, geographically distributed teams. Crew's simple and secure frontline workplace gives employees and leaders access to the information, motivation, and people they need to do exceptional work together. Crew helps more than 35,000 teams reduce turnover, increase sales, and improve customer service.

[crewapp.com](http://crewapp.com)

