

Human signals

Exploring emerging human behaviour and service purpose during COVID-19

Edition 2 | June 2020



Building a better
working world

A rolling research project

EY Seren teams help organisations achieve growth by serving the needs of people, communities and the planet.



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EY Seren teams are running two-week sprints of mixed-method research to understand how the global pandemic is **changing how we live and how we work**.

The hypothesis is that **human behaviour is changing significantly, and that service providers will need to significantly change what they offer and how they offer it, to meet these new needs**. To do that, EY Seren teams are running:

- ▶ **Desk research** across over 200 sources
- ▶ **Depth interviews** with people, virtually, in their own homes about what really matters to them right now
- ▶ **Diary studies** with customers across the UK to get insight into how behaviour is changing
- ▶ **Interviews with design leaders and professionals across sectors** to understand how COVID-19 is transforming the role of design and delivery
- ▶ **Quantitative surveys** to validate and scale the insight

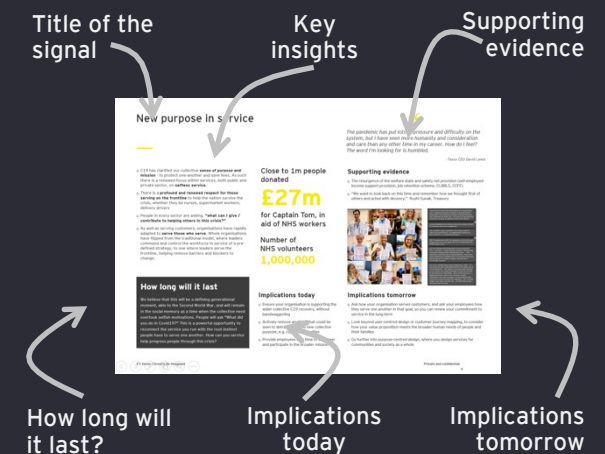
EY Seren teams will publish what we discover to our community fortnightly. If you want to **share your opinion** or find out more about this research, please let us know.

Insights in this issue

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The anatomy of an insight

Each fortnight EY Seren teams are collecting the research into a series of insights. We expect these to morph and adapt through this series of papers. All references are given at the end of the document.



Leaving lockdown - a recipe for behavioural confusion?

Governments are looking for strategies that unlock the economy whilst minimising health risks - a challenging behavioural dilemma.

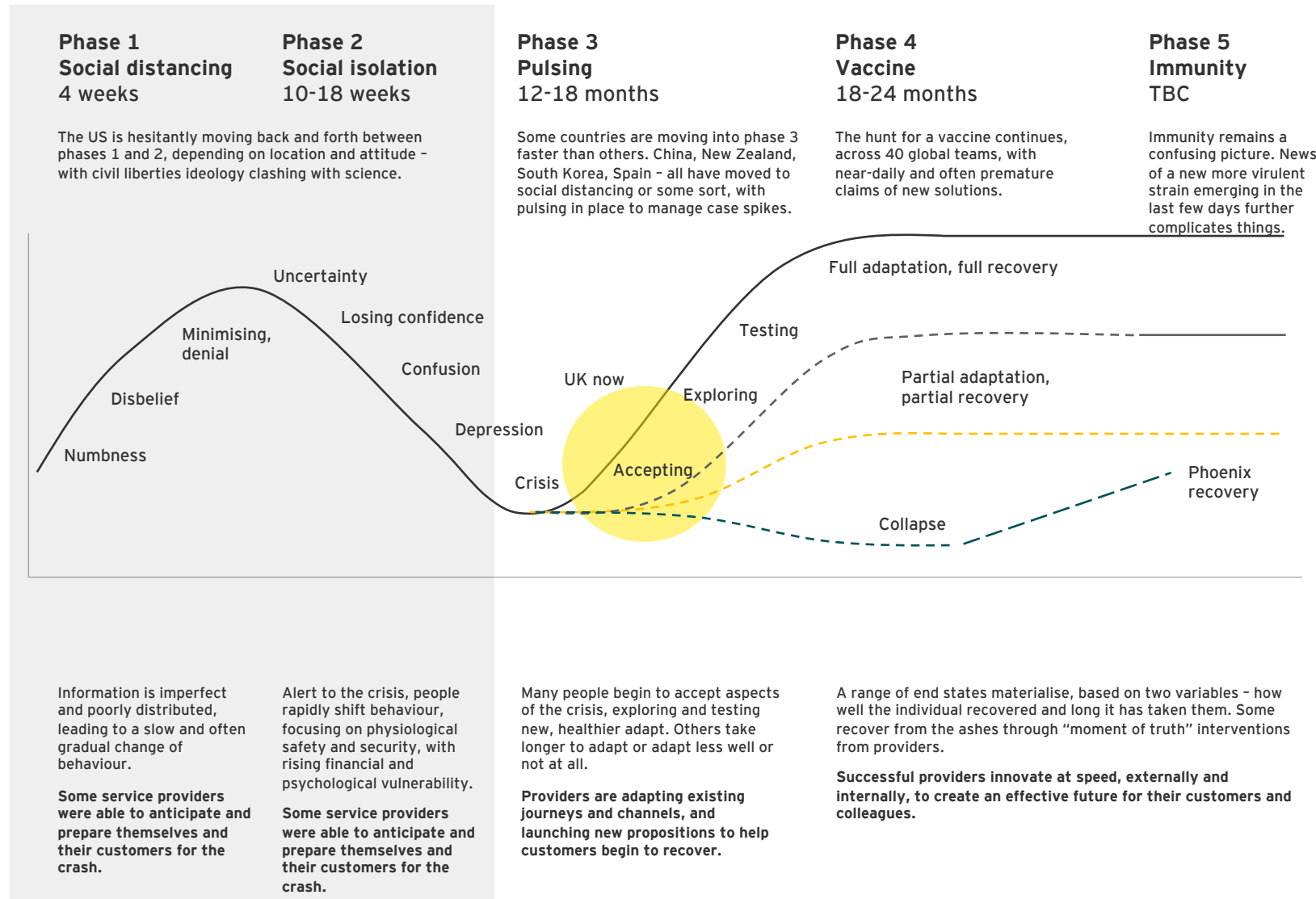
Moving to phase 3 - the UK has moved into phase 3, with a roadmap set out. Trials of health evidencing schemes are underway, alongside "back to work" guidance for employers.

Entering a new phase - after a period based on a relatively simple rule to stay at home, we are now entering a more complex phase, with its own risks.

Cognitive load - humans en-masse don't perform well under complex guidance, especially when it goes against ingrained habit and custom. The wider the range of interpretations, the greater the likelihood the rules will be eroded, intentionally or unintentionally.

Trust - so far there's been a high rate of obedience to the rules and science. In recent polls "scientists are the most trusted, [and] Government officials... are at the bottom of the rank." The former work in open and peer-reviewed transparency to protect health. The latter work under very different circumstances and to a range of balanced objectives. Public trust in the combined team and their rules are likely to be tested in this phase.

Service inconsistency - it now looks likely that different sectors will work under different rules. But people don't experience life as sectors, so confusion and inconsistent behaviour is likely to rise.





Edition 2

Human signals

What EY Seren teams' latest research has uncovered

Do I trust it?

Key insights

Unsurprisingly, what people trust and distrust has changed. In some areas normal factors have accentuated, but in others new factors have arisen.

Economies and markets are founded on trust - so all the talk about "reopening the economy" will only be enabled by close attention to these.

Physical - surfaces, spaces and other people are all possible sources of infection and thus not to be immediately trusted.

Emotional - our ability to trust others comes down to judgements of whether they demonstrate competence, act with integrity, care about others and honour commitments. This is acute for new behaviours, such as digital usage or contact tracing apps, where emotional concerns around security are likely to need managing.

Perceived: time is a factor. People are willing to spend 10 minutes in close proximity to get groceries, but not two hours in a cinema, and much less a week on a cruise ship.

Prejudice: trust is determined through our "fast thinking" brains, which are often caught up with unconscious bias and prejudice. This could lead to the exclusion of certain groups, e.g. minority groups who are affected significantly by COVID-19.

How long will it last

It takes a lot of mental and emotional effort to live in a world where you distrust everything. We're just not used to it. Providers who foster and signpost trust, allowing people to "get it on face value", will thrive. In other domains, there is potential for this latent mistrust to be negatively sustained in a culturally corrosive way, as blame for mistakes gets distributed and defensive "divide and conquer" strategies kick in.

78%
Want businesses to protect employees and local communities



Supporting evidence

"When we smell something putrid or "off" we tend to feel, and indeed signal, disgust, and whole areas of the brain, particularly the insula, are activated. Decisions such as what to eat, who to mate with, are influenced by such subtle non-conscious factors... What we know is that when in a state of stress or when sensing danger, we all tend to be more suspicious and less welcoming of others generally." - Dr Graham Music, Consultant Child and Adolescent Psychotherapist

"Employer communications are the most credible source of information about the coronavirus. 63% said that they would believe information from that channel... versus 58% for a government website and 51% for traditional media." - Edelmans' Trust Barometer Report

Currys PC World is planning to roll out a zero-contact Drive Thru model, so that customers can shop without entering stores.

Implications today

- ▶ It's not enough to be clean. You need to provide evidence of cleaning and a clear hygiene protocol - screens, sanitisers, floor markers - all of these provide a base level of comfort and reassurance.
- ▶ Given the BAME community is disproportionately affected by COVID-19, pay particular attention to your diversity and inclusion agenda.
- ▶ Use marketing content and outreach efforts that resonate with customers, and avoid the inauthenticity of bandwagoning

Implications tomorrow

- ▶ Clearly demonstrate that you prioritise the

wellbeing of your customers and staff over financial concerns during the crisis

- ▶ If you've made missteps in your response, create an overt trust rebuilding strategy, to recover ground.
- ▶ Given COVID-19 is likely to last in social memory, return to your vision and mission, and ensure that trust plays a key role.

Human insights

"Who would want to go on holiday? I don't want to be the first jumping on a plane, going to a restaurant, I'd rather observe others first."

- Diary participant, Male 65

"When I went to Lidl, they were wiping over lots of things they had hand sanitiser as you walked in [...] It meant I didn't feel as dirty out today, I know that was probably in my mind before, but I didn't feel as grossed out."

- Diary participant, Female 31

"Some supermarkets will let only one person in, others have social distancing outside, and free flowing inside - we never went back there."

- Diary participant, Male 65

“

Airlines are talking about spare seats in between passengers. But you still don't know what germs are around.

- Diary participant, Male 65

A new era of leadership

Key insights

The mid 1930s sparked the **era of the engineer**. Veblen, Scott, and Rautenstrauch likened society to a machine, calling for government as “social engineering”. The policymaker’s role was to tinker and probe, to keep things working despite stresses, strains, and shocks.

The 1970s brought the **era of the scientist**. “Neoliberals developed their ideas on the model of physics.” In this mode, countries, markets and firms could be run according to a “Washington Consensus” of standardised policies”. Nations and markets became “convenient laboratories” for change.

COVID-19 is accelerating us into a new era: that of **the doctor**. The doctor sees the newly globalised and financialised economy like an organism struck by pathogens where old rule books don’t apply, and where subjectivity and objectivity sit on an equal footing. The opportunity to shift strategy towards purpose, sustainability, and inclusiveness is available in ways that it wasn’t before.

As leaders around the world focus on the longer term recovery ahead, there is an emerging realisation that any return to normal will require them to transform their businesses, services and platforms. There is also a desire to not only return to a “new normal” but address larger, regional and global challenges along the way such as climate change, poverty, and access to healthcare. **Care is the new watchword** – so this shift to a doctor mindset of leadership seems like an opportunity that shouldn’t be missed.

Leading in this new era requires a range of **new attitudes and traits**: empathy, purpose, acting on behalf of all stakeholders your organisation represents and impacts; the ability to seek a range of inputs yet be decisive; being other-directed, strong vision-setting; and balancing risks. If in doubt do what the doctor does – get closer to the people you care for.

How long will it last

EY Seren teams can relate to a lot of this. We have long recognised the need to combine thick messy data about humans, with the cold hard data from machines. To bring different experts together in experiments, and use customer contact to trigger empathy. This is a way through wicked problems, so it feels like an acceleration of a long-term shift.



Supporting evidence

“We believe that leadership is strengthened by continually referring to the big picture as an anchor for meaning, resisting the temptation to compartmentalise or to consider human life in statistics alone. Leadership in an uncertain, fast-moving crisis means making oneself available to feel what it is like to be in another’s shoes – to lead with empathy.”

- Harvard Business Review

“But one thing is clear: traditional “alpha” leadership is not proving very helpful at all in this crisis. Those who attempt to project puffed-up authority and come across as falsely knowledgeable in a situation where there is no certainty are clearly not the people we can trust right now.”

- The Financial Times

Implications today

- ▶ If you’re in a leadership position, look as much to your heart as to your head, but don’t get woolly – urgent decisions are critically needed.
- ▶ Find ways to have contact with real customers and colleagues at the frontline, to balance the “filter bubble” risk of acting only off second-hand “cold” dashboard data about people.
- ▶ Keep your communications clear and transparent.
- ▶ Don’t fear mistakes and missteps. Avoid the instinct to double down to appear confident.

Implications tomorrow

- ▶ Create cognitively diverse teams, especially at leadership levels, as they’re proven to outperform cognitively normative teams.

- ▶ Coach senior leaders in conscious and vulnerable leadership qualities, so they’re open to diverse points of view and mixed sources of information.
- ▶ Encourage leaders to bring their own struggles and experiences to bear, to create empathy and understanding, and avoid the often demanding and alienating need to be “always alpha”.

Human insights

“I tried to create the feeling in people that they are empowered to treat the situation as they wanted to and get everything in place in their own way. You can control your own narrative”

- Senior Manager, Professional Services Business

“I’ve gotten to know my line manager as more of a friend.”

- Diary study participant, Female, 30s

“I’m being honest with my team about the down days I experience, this makes it easier for them to share their true feelings with me and the team. A feeling where a team member can say “I’m overwhelmed” and they can take the day for their head”

- Director, FTSE100

“

Please be strong, be kind, and unite against COVID-19.

Jacinda Ardern - New Zealand Prime Minister

We've all lost something

Key insights

Everyone's lost something to COVID-19 and **everyone's navigating recovery from loss**. At one extreme there are those who have lost a loved one and experience grief and bereavement. Then the many who have lost income and financial security. And then the billions of people who have lost their freedom. The connecting factors - the loss of connection, security, agency, identity and independence.

The **loss of rituals to deal with dying and grieving** further extends the experience of bereavement and recovery. It has become harder to be present for friends and loved ones, to support them through the emotional hardships and experiences of grief and isolation.

Loss is a well-established area of psychological enquiry. It can lead to depression and anxiety, but also anger. For example, the perceived loss of freedom in the US during lockdown has led to acts of civil disobedience.

Understanding two key dimensions of our collective sense of loss will help providers improve services to better support people:

Resources: access to resources is an indicator of how well someone will recover from loss. If you have access to information, support and money, you're more likely to recover.

Capacity: although you may have access to resources, you may not have the capacity to apply those resources, due to the debilitating effects of grieving or the loss of identity from redundancy.

Human insights

"Today has been tough to be honest. Went shopping on my lunch break and I think a combination of things, the relaxing of the lockdown rumours and just general anxiety made this a big deal. Found myself struggling to follow my wife's fairly simple shopping list and feeling very overwhelmed."

- *Diary study participant, male, 36*

"I didn't sleep too well. I think it's because I'm anxious about how the economy is going to recover from this but not only that, will my own job be safe as well? Will it be affected by any redundancies when I go back?"

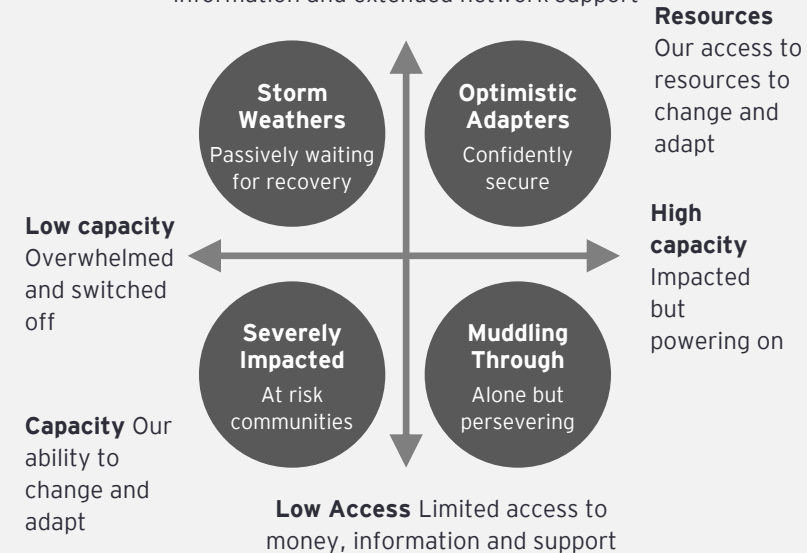
- *Diary study participant, male, 31*

Supporting evidence

"They tell us that COVID-19 is the great leveller. It's not. It's much much harder if you're poor."

- *Emily Maitlis, BBC News*

High Access Significant financial support, well information and extended network support



Loss Mindsets

EY Seren teams have created a framework to identify four customer mindsets across a spectrum that maps the intersection of our psychological capacity for change and the access to resources required to support us through that change. This framework allows us to align new and improvised service experiences to the specific need states of customers and colleagues. It allows us to experiment with ways to serve customers better, and use digital services and advanced analytics to support customers in improving their capacity for change, in circumstances where improved access to resources may not be possible.

How long will it last

With COVID-19, there's a strong cultural sense that everyone has lost something. The key for providers now is to move beyond the initial response phase of providing self-serve webpages and content resources, and create solutions that build the customer's capacity for change. The BBC's use of BBC Bitesize is a great example of helping both children and their parents to build their capacity to home-school.

The poorest fifth of households direct **55%** of their budgets on average to essentials, compared with just **39%** for the richest fifth. People living in more deprived areas in the UK have experienced COVID-19 mortality rates **more than double** those living in less deprived areas.

Implications today

- ▶ Recognise the vulnerability of customers and colleagues as a fact. Don't try to airbrush it out.
- ▶ Help people to normalise their emotions by providing information about usual reactions and pointing out that people often prevail, and even grow, through crisis.
- ▶ Connect to other service providers that can support customers and colleagues with limited access to resources.

Implications tomorrow

- ▶ Identify opportunities to support customers and colleagues through a phase of post traumatic recovery and growth.
- ▶ Review customer journeys and service communications for practical opportunities to help customers shift their mindset and increase their capacity for change.
- ▶ Connect customers together in communities where they can support one another and position your brand as a partner in recovery.

Make do and mend

Key insights

Although many have lost something in this crisis, there's also emerging evidence of people trying to **create something new**.

Consumption of screen content has risen, but the combination of binge-watching colleagues then binge-watching Netflix isn't much fun - there is a need to achieve a **screen-life balance**.

This desire to create something new is not about chest-thumping declarations of emerging from isolation with a suite of new skills, a new business idea and a brand new body, it's a gentler notion.

Given the scarcity of goods, resources, stimulus and cash, people are having to **make do and mend** what they have.

This **shift from consumption to production** is helping people find or rediscover the forgotten pleasure of the creative process.

So whilst for some this may be developing a new skill, for many it is the smaller acts, having a go at scratch cooking, creating a movie night or taking up drawing again, that are providing both relief and support, and bringing families closer together.

How long will it last

How much of this is born out of necessity versus choice is yet to be seen. For some, financial prudence will mean this becomes a necessary way of life for some time - a means of exerting control over their lives and expenditure. For others, the benefits to wellbeing, health, and family togetherness may form new rituals and values. As countries begin to emerge from lockdown, our newfound - and sustainable - skills will compete with the consumer convenience of the ready-made, pick-up-and-go culture.

Supporting evidence

"All bread bakers feel united. People are baking bread in many different languages"

- **Nigella Lawson**

"The garden is a sanctuary. No one wants to be isolated just in their house. It's good for the mind ... it gives you a sense of well-being."

- **Alan Roper, The Blue Diamond Group**

John Lewis is reporting a rise in sales of **sewing machines, craft kits** and **wool** as people become more creative with their time.

Online DIY product sales were up **42%** in March.

Implications today

- ▶ People are evaluating what they consider to be essential spending, especially as the longer term financial implications bite - the experience of "making do" is one way people are taking control and managing their financial uncertainty.
- ▶ Engage consumers in their desire to "create" and provide them with access to the tools, resources, and insights to make do with less, and create experiences in isolation that generate value.

Human insights

"My son is excited as I have created a little movie night and made little snack boxes, we would've never done this kind of thing before. Made cookies again - it went wrong. I'm not good at baking, but lockdown has made me try"

- **Diary study participant, female, 31**

"The one thing I reflected on today when both me and my son were lying on the grass in our garden, was the fact that this has given not just us, but everyone a great opportunity to re-live the "old school" days where parents had a lot more time to play with their children, spend time away from the TV and computers."

- **Diary study participant, male, 31**

Life in lockdown from diary study participants



Implications tomorrow

- ▶ New models of consumption will begin to emerge as the long term benefits of what lock down means in terms of climate change and consumer waste are examined. Brands that can activate the desire in customers and colleagues to make a difference will build on the loyalty they are creating through purpose with customers.
- ▶ A shift to purpose-centred design will support brands in creating authentic value with customers and colleagues in the post-lockdown consumer experience.

Sharing space and burdens

Key insights

COVID-19 is changing how people interact and navigate spaces (both public and private). **We are moving from a “high-touch” to a “low-touch” world.**

Urban infrastructure is ill-suited to physical distancing and is being **hastily changed to signal desired behaviours.**

Employers will roll out **physical distancing measures in workplaces.** This is already happening in China.

Citizens’ new default position will be to avoid crowds and public transport. **Bicycle use will increase in urban areas.**

People are sharing the burden of lockdown in family units and local communities. In some cases family members in the same local community are using social media to stay connected as they are forced to self-isolate.

In the short term, impacted workers have relied on bank repayment holidays and the government furlough scheme to sustain them. However, when these crutches are withdrawn, individuals will be forced to **turn to their family and other networks to bridge income gaps.**

How long will it last

Changes to public and private space will persist long after the immediate peak of infections subsides. Retail and leisure environments will be forced to adapt to facilitate low-touch, limited-proximity operating modes until a vaccine is widely available.

The phasing out of the government furlough scheme from July will mark the beginning of a new phase of vulnerability for workers as they turn to family to share burdens.

Supporting evidence

“The Mayor of London, Sadiq Khan, and TfL have today unveiled their “London Streetspace” programme which will rapidly transform London’s streets to accommodate a possible ten-fold increase in cycling and five-fold increase in walking when lockdown restrictions are eased. ...TfL will rapidly repurpose London’s streets to serve this unprecedented demand for walking and cycling in a major new strategic shift.”

- Press release, 6 May 2020

“A crucial factor for the future direction of the property market is the willingness of the “Bank of Mum and Dad” to keep on lending or gifting deposits”

- Clare Barret, Personal Finance Editor, FT

As of 1st May **4M** workers have been furloughed on **80%** of pay ,and more than **1.2M** have paused their mortgage repayments for three months.

Implications today

- ▶ Service providers should facilitate the shift to “low-touch”. They must consider how to encourage healthy behaviours to welcome customers back in a safe environment.
- ▶ Employers must introduce short-term transformations to office configuration, including contactless doors, lifts, room dividers and much stricter cleaning regimes.
- ▶ Employers will need to stagger the employee return to workplace. Guidelines for employees need to be clear with focused, hyper-care engagement.
- ▶ Customer experiences will need to manage new need states, anxieties and changing behaviours for a return to the high street and close proximity services.

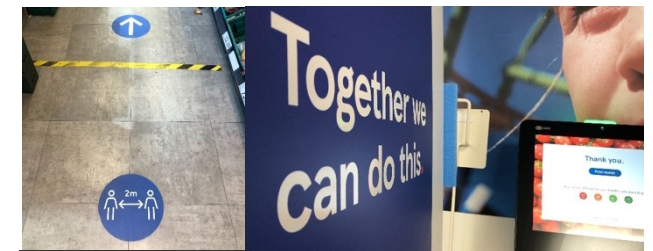
Human insights

“Now I think I’ll be anxious and more cautious about getting on packed tubes”

- Diary study participant, female, 31

“I think, one factor I have found challenging during this lockdown is that this is now the ‘new norm’. The whole queuing up for ages to get into a shop and then not being able to go with my wife to several shops, this has made shopping a lot more difficult, but I completely understand as to why it needs to be done.”

- Diary study participant, male, 31



Social distancing signposting in enclosed public spaces

Implications tomorrow

- ▶ Urban infrastructure will be redesigned to better regulate citizens’ flow around cities and reduce overcrowding and “choke points”.
- ▶ Employers should consider scaling down office space out of economic necessity, re-imagine the use and need of physical space for safe working and customer service and accommodate increased virtual working routines for most workers from home.
- ▶ Service providers must plan for a significant decrease in consumer activity and inability of borrowers to sustain repayments.
- ▶ Services will need to further digitise to ensure they are resilient, can accommodate pre-vaccine consumer behaviour and return to lockdown when outbreaks emerge.

Generation crisis

Key insights

A whole generation is **growing up that only know crisis**: with the 2008 financial crisis, COVID-19, and Brexit in the foreground, and the climate crisis ever-present in the background.

The typical psychological responses to crisis are uncertainty, fear and hopelessness, whilst at the same time people try to live an emotionally positive life. This can lead to **cognitive dissonance** and **bewilderment** - as indicated by the research:

- ▶ Longing for human connection **vs** valuing the solitude
- ▶ Guilty about screen time **vs** screens providing a lifeline
- ▶ Living for now **vs** feeling helpless about the future
- ▶ Enjoying a life pause **vs** tragedy of trauma elsewhere
- ▶ Enjoying family time **vs** madness of forced intimacy
- ▶ Opportunity to introspect **vs** feeling sick of myself
- ▶ Wanting to grasp the opportunity **vs** feeling exhausted
- ▶ Rediscovering cooking **vs** bored cooking every meal
- ▶ Working from home is good **vs** binge watching colleagues is bad
- ▶ Optimism for humanity coming together **vs** pessimism of long-term outlook

Millennials, born between 1981 and 2008 and now the largest part of the workforce, are maturing into a world of **continual personal and emotional turbulence**.

How long will it last

This is a generation that has only ever known crisis and the persistent need to adapt for the short term. Whether it leads to post traumatic stress or growth depends on individual capacity for change. EY Seren teams expect an increase in security-seeking and also radical new thinking.

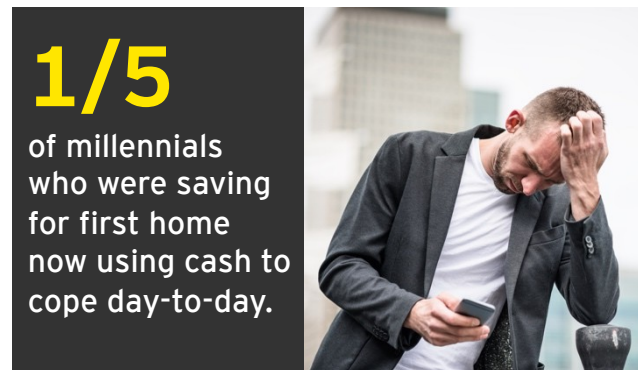
Supporting evidence

"More than a third (35%) of 26-40-year-olds are preparing to dip into savings and 22% are borrowing money from a friend or family member to get by... 8 in 10 (78%) millennials say they are currently concerned about their ability to pay bills and loans."

- Yahoo Finance

"They have smaller savings accounts than prior generations. They have less money invested. They own fewer houses to refinance or rent out or sell. They make less money, and are less likely to have benefits like paid sick leave... Compounding their troubles, millennials are, for now, disproportionate holders of the kind of positions disappearing the fastest."

- The Atlantic



Implications today

- ▶ This cohort likely makes up a large part of your workforce, so make time to empathise with the conflicting emotions people are feeling.
- ▶ Adapt the service propositions you offer to better serve the need for stability and security-seeking. Create offers that combine a pathway to the future combined with flexibility along the way.

Human insights

"I woke up so early today had the worst night's sleep and the worst dreams. I realise now I think it was because I was watching the news before bed as this happened last week as well as all the dreams in a weird way were about COVID-19. I was so anxious."

Diary study participant, female, 32

"Struggled today because work was slow, and I didn't have much planned besides that. I live alone so often feel lonely during lockdown and miss human interaction with family and friends."

- Diary study participant, female, 31

“

As we're trying to hack the system and figure it out, we just got hit again... It makes you just want to lay down and just stay there.

- Vox magazine interviewee

Implications tomorrow

- ▶ Seek out the voice of this cohort in decision-making, whether from employees inside your organisation, or from customers outside.
- ▶ Provide explicit permission to this group that they can experiment through change. Empower them to explore radical thinking, within a structured approach that manages risk.

Virtualising customs and rituals

Key insights

Customs and rituals are integral to being human. **There is an** uncanny sense of incompleteness when one can't hug a loved one, head out to meet friends and family for lunch, or shake hands with a client at the start of a meeting.

Equally, physical playground rituals play a real role in childhood education. **Many families struggle with the responsibility of home schooling and keeping children engaged.**

Our leisure time is marked by rituals of collective meals, weekend trips to shopping malls and high streets for lunch and dinner, window shopping, sporting events, cultural events, and so much more.

As the summer months approach, travel destinations, culture events, and sports are **all virtualising a return to a mediated shared experience.**

We are more social, in many ways, than ever before, and **social distancing is really more about physical distancing** and our willingness to experience services and share moments together safely in close physical proximity.

How long will it last

It's about physical distancing, not social distancing. Service providers need to create new ways to engage customers in physical proximity and connect families and friends through social and commercial rituals that can be enhanced and supported by digital and virtual experiences. And as new habits and rituals emerge, with a focus on sustainability and social purpose, brands have an opportunity to shape new services and value propositions.

90%
of the world's population now live in countries with travel restrictions.

An estimated **25M** aviation jobs and **100M** travel and tourism jobs are at risk.

Supporting evidence

Chinese authorities are working hard to encourage citizens to stop the tradition of shared plates and potluck meals.

The retailer Currys have launched a new live video shopping service to allow people to browse stores with help from professionals.

Some UK bank branches are using video conferencing to maintain contact with their local customers.

Many museums, cultural sites, and travel destinations have launched virtual tours you can access from home and explore at your leisure.

"We're not going to swing the doors open and go back to what was happening before. I don't think that "where shall we go in Europe for the weekend?" approach is going to come back in the same casual manner."

- **Tony Wheeler, Lonely Planet**

Human insights

"Morning home-schooling is more structured than the afternoon"

- **Diary study participant, female, 31**

"We are not socialising in person but are going onto Zoom and various WhatsApp groups but even this is getting boring now - except with my children and grandchildren. Generally, really fed up that I can't do what I want."

- **Diary study participant, male, 65**



Implications today

- ▶ Adapt your service so that old rituals and customs can be maintained.
- ▶ Think about the physical touchpoints not only in your service experience, but the journey to your service and journey home afterward. What are the concerns your customers and colleagues will have? How will you address them? How will you virtualise and deliver your service experience to the home?
- ▶ Use your research, insights and analytics to gain a deeper understanding of your customers' needs and shape virtual experiences that can build a stronger emotional connection.

Implications tomorrow

- ▶ Find ways to create new customs and rituals.
- ▶ Virtualise service to create increased social proximity whilst maintain physical distancing. Allow colleagues to connect with customers and increase the personal nature of the services you provide, powered by your digital capabilities.
- ▶ Tap into your customers' new found sense of purpose and longing for a return of social experiences, to drive better engagement and create connections that will last a lifetime.

Escape from home

Key insights

The end of the lockdown honeymoon has been palpable: the flood of memes have reduced, the long-term fatigue of isolation is kicking in, and though some may not yet feel ready to return to work, many more are ready to escape the home.

Governments are easing lockdown restrictions. Complex social distancing rules and personal health concerns will make the return to physical proximity a complex challenge for those returning to work, their high street, and their school. Expect a return to some things, but normal is unlikely to be one of them.

Each individual will balance competing and inter-related personal, family health and financial wellbeing considerations when assessing their level of comfort with a return to any physical proximity.

Many have found new ways to live and work, which will be either cast away or reconfigured in a new round of experiments.

For customers dealing with complex issues like bereavement, illness, and job loss, these will continue and they're likely to demand new digital expectations developed during lockdown to be met.

How long will it last

The return to work will be an ongoing effort as markets re-open and people escape their homes to physically re-engage with services, family and colleagues. Responding to colleagues and customers with purpose, transparency and empathy will be essential. Our day one response will adapt over time. Customer and colleague sentiment measurement will help you navigate changing behaviours and expectations.

Supporting evidence

A recent poll by the Economist found that over a third of Americans think it will be "several months" before it will be safe to reopen businesses as normal—which suggests that if businesses do re-open some customers, at least, may stay away.

EY research participants had conflicting perspectives on the future, desiring an escape from home but also balancing personal and family health concerns and conflicting messages across the global media and government landscape.



Implications today

- ▶ Set clear principles about the way you'll manage the process.
- ▶ Set-up and track how customers and colleagues are experiencing the shift, so you can quickly inform decisions.
- ▶ Pay overly close attention to feedback and measures, and communicate regularly, at the same crisis levels, on any adjustments to protocol.

Human insights

"I'm less concerned about getting back to work but more worried about the prospect of getting there - will I really want to get on the Tube, step into an elevator or even eat lunch out?"

- Design Leader, FTSE100

"Finding it tough being away from loved ones. Feeling sad that I can't physically see them."

- Diary study participant, female, 31

"Like lots of Nans, I'm missing my grand-daughters. I just want to hug them and smell them. I want to kiss their sticky faces."

- Diary study participant, female, 56

“

As people come out of this crisis and start coming back to work, the first thing that I would do is have a discussion about what everyone learned from the experiments they ran. Some of those experiments were by force, others were by choice, but we've all had to test out different routines and the way we work.

- Adam Grant,

Wharton School Professor and Author of Give and Take

Implications tomorrow

- ▶ Set up a return to work central function, to explore what elements of this experiment should remain and what should end.
- ▶ Be transparent with your behavioural insights and data, collating cross-sector best practice, and government guidance on staying healthy and well in close proximity.
- ▶ Even though we've progressed to phase 3, make plans for intermittent returns to phase 2, and also for how you will progress based on phase 4 and 5 scenarios.

A woman with blonde hair is sitting at a wooden table in a kitchen, looking at a laptop and holding a smartphone. In the background, a man is standing near a washing machine, and a young girl is sitting on a kitchen counter. The scene is dimly lit, suggesting an evening or indoor lighting. The text is overlaid on the left side of the image.

Edition 2 Working with signals

How to apply these insights in your organisation

Working with #humansignals

Using the concept-generation matrix so you can action these human signals in your organisation

About this method

The next couple of pages walks you through a simple, hands-on method for generating ideas from these human signals, or any insights you may have access to or be generating. The aim is to help you identify opportunities and generate ideas relevant to your customers, organisation and context.

When to use:

Once you've read the themes and are thinking: how can I apply these to our organisation, in our context?

What you'll need:

- ▶ A team of people responsible for your COVID-19 response
- ▶ An open-minded and trusted atmosphere
- ▶ Reliable video conferencing tool
- ▶ Online whiteboarding tool

Step-by-step guide



Step 1. Prepare

- ▶ Take the themes from human signals that resonate with your organisation and prioritise the ones you want to work on.
- ▶ Feel free to rephrase or break them down to suit your needs. Just make sure your team has a shared understanding of them.
- ▶ You can also supplement the list with any additional insights your own research teams may have identified.
- ▶ Lay out your insights in the below format, on your online whiteboard tool. You should end up with the same themes labelled along the horizontal axis and areas of impact along the vertical axis.
- ▶ Every grey square then represents the intersection of a theme with an area of impact.

What to do?

Step 2. Explore

- ▶ Secure enough time for your team to focus on this exercise. We would recommend around 90 minutes. Set the scope for the session based on your strategic or team priorities.
- ▶ Break the team into smaller breakout groups of two, in separate calls if possible and assign them each a theme or set of the themes to explore. Have the teams code challenges in red and opportunities in yellow.
- ▶ Give people 30-40 minutes to work quietly in pairs, to generate ideas in each of their boxes. Give people a timeslot and target number of ideas per box. Keep the energy up and drive momentum. Quantity and chemistry is more important than quality at this stage.

Step 3. Prioritise

- ▶ Bring the groups back together.
- ▶ Ask each group to talk through their preferred ideas. Encourage anyone with a similar idea to call out "snap" (you can utilise the chat function here), and then contribute any builds they might have. Encourage a "yes and..." mindset to build on ideas.
- ▶ Once complete, you should have a populated board. Ask everyone to vote against their favourite ideas. Some tools have dedicated voting features. Give each team member a fixed number of votes to cast.
- ▶ Look at the results of voting and agree on what ideas should be prioritised.

Canvas to use

	Human signal 1	Human signal 2	Human signal 3	...
Customer				...
Colleague				...
Business				...

	Do I trust it	A new era of leadership	Customs and rituals	...
Customer	●	● ○	○ ○	...
Colleague	○ ○	○	●	...
Business	● ○	● ○	○ ●	...

Working with #humansignals

Moving from human signals towards a timeline of opportunities (Page 2/2)

Step-by-step guide continued

What to do?

Step 4. Put your ideas on a timeline

- ▶ This step is all about prioritising which ideas need to be worked on most urgently.
- ▶ Edit the timeline headers below to fit with your organisation's own milestones, or you can use our timelines from earlier in the document (from pulsing through to immunity) - whichever works best.
- ▶ Take each priority idea from step 3 and allocate them to a phase in the timeline.
- ▶ For each idea, challenge the team on how they can deliver value across all three time horizons. As an example, for a beyond concept, what is the now activity to consider that may allow us to deliver value earlier.

Step 5. Run your customer and organisation through the concept

- ▶ This step is about going deep into your idea from a customer's point of view, and from a few organisational points of view - so you can check it's desirable, feasible and viable.
- ▶ **Customer:** whether B2B or B2C, your customer will experience your service idea over time. If you have customer personas, introduce them here. Their experience will have a:
 - ▶ Before - the trigger and the route are critical, how the need emerges and the customer discovers the service and decides whether to invest time and effort in it to get value out.
 - ▶ Begin - first impressions of a service matter and are where new behaviours are forged.
 - ▶ During - how the customer gets value over time from using products and channels.
 - ▶ After - how the customer assesses the service and shares the experience with others.
- ▶ **Channel:** consider which channels customers are likely to want to use to interact with the service.
- ▶ **Enablers:** which internal organisational teams need to be consulted to make this a reality?
- ▶ **Success measures:** what cost, revenue and experience metrics will indicate service success for your idea.

Canvas to use

Now	Next	Beyond
<i>Days and weeks</i>	<i>Weeks and months</i>	<i>Months and years</i>

	Before	Begin	During	After
Customer				
Channel				
Enablers				
Success measures				

You should now have a range of fresh, COVID-19 relevant, customer-centred and business-oriented concepts to socialise within the business.

Get in touch if you want help with any of this or would like a facilitated session.



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A woman with blonde hair is sitting at a wooden dining table, focused on her laptop. She is also holding a smartphone in her left hand. On the table in front of her is a white coffee cup, a notebook, and a charging cable. In the background, a man is standing at a kitchen counter, and a young girl is sitting on the counter to the right. The scene is set in a modern kitchen with dark cabinets and a washing machine. The overall atmosphere is one of remote work in a home environment.

Edition 2

Leaders guide

On creating value remotely

When value comes from deep work, how do you help teams avoid the shallows of remote working?

Why you now need to move from a situation of remote busyness, to a focus on remote value creation.

EY Seren teams have long recognised the power of “deep work”, which is why our sprints usually have “dark room Fridays”, so people can recharge, collect their thoughts and let creative ideas emerge from the hustle of a busy week.

EY Seren teams explore how organisations can achieve this through remote working.

“We all like to think we have strong teams that can work autonomously but the reality is some people cope with this better than others... It’s difficult to strike the balance between being a good “remote” leader together with not being intrusive or being seen to be checking up for the sake of checking up.”

- Diary study participant, male, 36

According to the Harvard Business Review, the time employees spend on collaboration has increased by 50% over the past two decades... [but] researchers found it was not uncommon for workers to spend a full 80% of their workdays communicating with colleagues in the form of email (on which workers’ spend an average of six hours a day); meetings (which fill up 15% of a company’s time, on average); and more recently instant messaging apps (the average Slack user sends an average of 200 messages a day, though 1,000-message power users are “not the exception”).”

- Doist

Remote working can increase shallow work and decrease the deep work where value is created

- ▶ Constant interruptions to check in and communicate break flow, which is a critical ingredient of deep work. The fewer the interruptions, the better quality the work.
- ▶ The need to be visibly productive becomes the need to be connected. The industrial work model of “productivity” required workers to be visibly working for the full eight-hour day to justify their employment. In remote knowledge work, this isn’t so necessary, or even so desirable. We’re all experiencing how counterproductive being “always on” can be.

Shallow work

- ▶ Processing email and chat
- ▶ Attending status update meetings
- ▶ Arranging logistics
- ▶ Organising work lists

Deep work

- ▶ Working on a service improvement or innovation
- ▶ Defining and writing a strategy paper
- ▶ Preparing a key presentation
- ▶ Researching a problem

- ▶ Right now people are so “busy” they’re having to do their deep work in the margins, around a tidal wave of shallow work. This is leading to personal problems (stress and overwork) and also business problems - not enough value is being created.

Right now teams are confused and tired. To maximise the deep work your organisation needs, leaders must actively rethink how to lead teams and help them work remotely.

How world-leading value creation businesses do it remotely

“ “We’re betting that in the future, the most successful companies and teams will be the ones who make this shift. It will be the teams that don’t require their employees to be always-on, prioritise asynchronous communication to create space for deep work, and allow employees to disconnect and recharge fully.”

- Doist

“Regardless of industry, company size, or leadership styles, a high-trust culture is a defining characteristic of every company that wins a coveted spot on the Fortune 100 Best Companies to Work For list that we have produced each year since 1998.”

- Great Place to Work

Remote working maturity scale

Skeptics	Testers	Adopters	Scalers
Don't see value of or need for remote working. May even suspect deep, value creating work can only be done with physical proximity.	Apply remote working by exception to specific locations and roles. Cultural norm is to work in physical proximity.	Available to everyone, though models of use and engagement vary across the organisation. Cultural confusion about best way to work together to create value.	Remote working shapes how the organisation thinks and works. Value is created systematically, regardless of location or personal preference.

Organisations higher up the scale have a preference for:

1. Asynchronous over synchronous work	Synchronous work requires the whole team to stop what they're doing in order to come together for the majority of activities e.g., updates, decisions, communications. This breaks people's flow and undermines quality of knowledge work. Instead, asynchronous work allows the bulk of these things to happen in parallel to the work, using transparent work tools like kanban boards and by using email and messaging apps. Though beware of email, as it locks information in personal inboxes.
2. Writing over talking	Talking fades, where as writing persists. When people are remote, and trying to work to their own energy, they won't always be there to hear you speak. So you, or someone else, will end up repeating things. Often details will be confused along the way. Writing things down provides a persistent record, available to all in the team. It usually encourages clearer thinking too.
3. Blocking time over fragmented time	Everyone works differently. Some are night owls, some are introverts. Cognitively diverse teams excel. So it's best to let people work the way that gives them best energy. The key to this is letting people and teams block their time each day and week, and avoid fragmented and crowded days. The key is to let people balance signal and noise - with enough collaboration and solo working to achieve the result.
4. Maximising work not done over busywork	Measure performance based on outputs and results, not on responsiveness or hours worked. You want teams actively managing their scope and deliverables within available time and based on available resources. Encourage them to challenge one another on whether planned work is necessary or a priority. Focus only on what's needed to achieve the outcome.
5. Using the tech over being used by the tech	The speed at which software like Zoom, Microsoft Teams and other remote working tools have been adopted, demonstrates how reliant teams now are on these new technologies. However, no tool is perfect. Teams need to work out how they will combine different tools into their work, alongside good remote ways of working (which is explored on the next page). All technology has downsides - notifications can encourage overwork and burn out, and the "always on virtual mirror" of video-conferencing software, is quickly becoming a less-popular feature.

Questions leaders should consider to improve remote working maturity

Remote working doesn't work the same way as normal working. Leaders need to make a number of active choices.

What rituals matter to us?

Don't let physical distancing become social distancing. Consider which of your work rituals need to be virtualised. Explore what new ones may be needed.

- ▶ Use morning "stand ups" and "stand downs" to help people collectively start and end the day.
- ▶ Encourage people to create their own 5-10 min "time-to-work" and "time-to-finish" rituals, to replace the travel between home and work.
- ▶ Retain serendipity by allowing guests to attend other team meetings, or by running non-work sessions during work hours e.g. group lunch.
- ▶ Encourage audible claps and cheers when recognising success on video conferences.
- ▶ Make time for rapport so people can still create bonds.
- ▶ Give junior members access to senior people, to replace the "being spotted" opportunities of the office.

How should we communicate?

In remote working, not all channels perform the same function, and dialogue and one-way communication work better on different formats.

- ▶ Match channel to need. Video-conferencing for complex dialogue, written messages for relaying facts.
- ▶ Use the *why, what, when, who* model of communications, so you don't forget key facts.
- ▶ Encourage people to share their communication styles, so people don't negatively judge others.
- ▶ Use photos and gifs to help bring messages to life.
- ▶ Be present. People need verbal and non verbal feedback during video conferences. Avoid "dead-face" aka "I'm here but doing something else".
- ▶ Avoid backchannel. It may be innocent, but it unnerves the speaker.
- ▶ Build in pauses and solo thinking, to encourage input from quieter members.

What can and can't people do?

As organisations take on remote working, it can lead to confusion and uncertainty of how to behave. This can often leave people feeling they should just do more. Help people define practical terms, such as:

- ▶ "You don't have to attend everything, but you must attend these things..."
- ▶ "You can and should block out "dark room time" for focused work. We suggest..."
- ▶ "You don't have to have your camera on... or explain why it's off."
- ▶ "You can experiment with taking a meeting whilst taking a walk."
- ▶ "Don't be afraid of having family and pets play an unexpected role."
- ▶ "You can turn your notifications off between x and y times, and all channels off out-of-office hours."

How should I manage?

Remote working is not a free-for-all. As a leader, you need to make clear what you expect from people, and avoid the bigger risk of misinterpretation that comes with remote working.

- ▶ Set clear expectations, through over-detailed written briefs and delegation documents.
- ▶ Consciously increase the trust you put in teams and avoid micromanagement.
- ▶ In return, request transparency, through Kanban boards and wikis, so you can drop in anytime to see how the work is progressing.
- ▶ Agree clear decision making norms.
- ▶ Go for joint tasks, rather than isolated ones, to avoid reinforcing isolation.
- ▶ Create a shared identity within the team, which echoes the company mission. Use it as a regular touchstone.
- ▶ More of your team are vulnerable, so give extra focus to diversity and inclusion. Start team meetings with a check in, allowing people to score their energy from 1-10, with no judgement. Encourage peers to support one another.

How do we meet?

Fewer opportunities to connect necessitate good meeting hygiene.

- ▶ Set a clear agenda in advance.
- ▶ Start with the decisions the group needs to make.
- ▶ Consider allowing people time to review material in silence. Then open for discussion.
- ▶ Designate a clear chairperson to run the agenda, keep to time and achieve the outcome.
- ▶ "Stack" contributors who want to comment, so each gets queued.
- ▶ Don't feel obliged to wait for a meeting. Some video conferences are best done unplanned.
- ▶ Take notes live into a shared wiki, and create Kanban cards for all actions, so there is a live record, and to avoid re-work.

A woman with blonde hair is sitting at a wooden dining table, looking down at a laptop. She is holding a smartphone in her left hand. On the table in front of her is a white coffee cup, a notebook, and a charging cable. In the background, a man is standing at a kitchen counter, and a young girl is sitting on the counter to the right. The scene is dimly lit, suggesting an evening or indoor lighting. The text 'Edition 2' is in yellow, and 'Notes from the field' is in white.

Edition 2 Notes from the field

Remote diary studies

Dear (virtual) diary...

Human signals called for a research technique which would reveal changing habits, attitudes and motivations over time. EY Seren researchers chose an ethnographic, longitudinal method called a **diary study** to gather **rich qualitative data** on their experience of life during the pandemic.

Research participants are asked to **log key activities on-the-fly via a private WhatsApp channel** and reflect on their experience and emotions at the end of each day. This approach is proving ideal for **gathering insights from participants remotely in the context of the COVID-19 lockdown**.

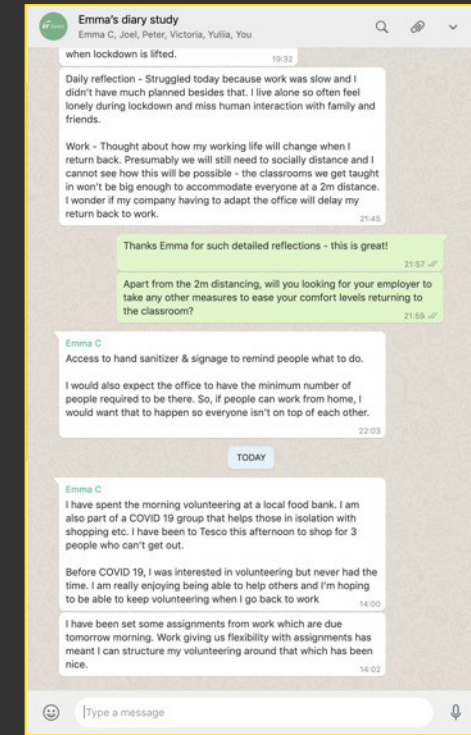
Researchers respond rapidly to emerging events, **probing participants for vital information in real-time** as their experience unfolds.

Why virtual diary studies?

- ▶ Discovering the new: ideal for revealing territories for new product and service development.
- ▶ Getting Personal: diary studies are up close and personal – a rare opportunity for access to customers' lives, thoughts and feelings on a very human level.
- ▶ Revealing authenticity: participants respond in their own time, in their own environment. This facilitates authentic responses on a deep level.
- ▶ Understanding context: EY Seren teams learn about the environment that a product or service is being (or will be) used. This often reveals unexpected challenges and opportunities that wouldn't be revealed in a lab or interview.
- ▶ Uncovering insights: diaries generate a lot of data (which requires sifting), but the result is often surprising insights which might not have registered on a survey or interview.
- ▶ Achieving depth: researchers conduct depth interviews at the end of the diary study to help the team correctly interpret the content shared in the diary updates.

10
Participants

148
Days of participant diaries (cumulative)



Secure, private WhatsApp channel between researchers and participant.

Notes from the field



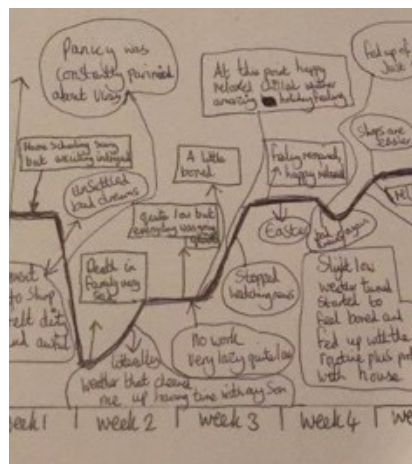
Guy Simpson

“Rather than asking participants to remember what they did or how they felt in the past, interceptive messaging allows participants to respond in the moment with messages and photos via a tool they have at their fingertips - WhatsApp.”



Victoria Rogers

“The tool's familiar and light-touch nature makes it perfect for engaging hard-to-engage individuals like busy health professionals and parents juggling work with childcare.”

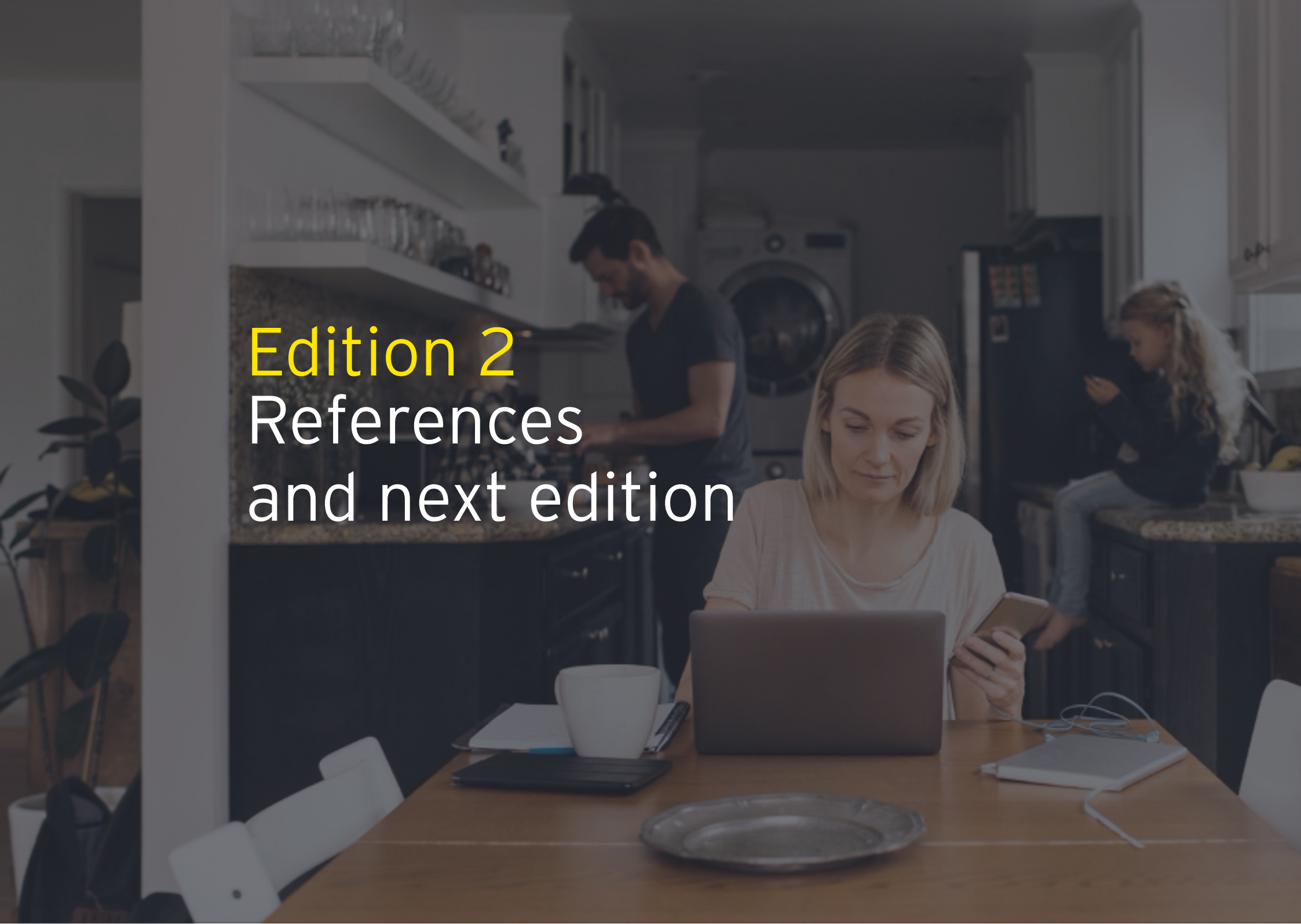


In-diary exercises produce rich participant artefacts such as this mood chart.

Part 2: Daily reflections - potential topics



Participants are provided with a framework to guide their daily reflections.

A woman with blonde hair is sitting at a wooden table in a kitchen, looking at a laptop and holding a smartphone. In the background, a man is standing near a washing machine, and a young girl is sitting on a counter. The scene is dimly lit, suggesting evening or night. The text 'Edition 2' is in yellow, and 'References and next edition' is in white.

Edition 2
References
and next edition

What next?

EY Seren teams are taking an iterative approach to this research, working in two-week sprints to continually challenge our assumptions and release what we discover to our community. If you want to share your opinion, get earlier editions or find out more about this research, please let us know.



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Edition 1 of “human signals” is still available via the [EY Seren website](#)

1. New purpose in service
2. Straining digital capacity
3. Health evidencing and etiquette
4. Homification of work
5. Adapting and becoming more adaptive
6. Enterprise agility tested
7. We're all vulnerable



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