“Ten Steps of Engagement For Managers and Leaders”

Leadership for Today and Tomorrow

Introduction Exercise

Your Passion

– Find someone in the room that you don’t know (or don’t know as well as others)
– Share at least one non-work passion and why you enjoy it
– Introduce your partner
  – Name
  – Position
  – Passion
Purpose of this Leadership Workshop

`Leaders are key drivers of employee engagement`

1. Reinforce the important role you play in fostering employee engagement
2. Create awareness that employee engagement is a key strategic initiative
3. Reinforce the connection between employee engagement and high performance
4. Introduce new tools and share leadership best practices (Macro and Micro)

Agenda

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00</td>
<td>Welcome and Opening Remarks</td>
</tr>
<tr>
<td>8:20</td>
<td>Introduction Exercise</td>
</tr>
<tr>
<td>8:40</td>
<td>Overview</td>
</tr>
<tr>
<td>9:00</td>
<td>The 10 Essential Steps of Engagement</td>
</tr>
<tr>
<td>9:00</td>
<td>Step 1 – Link to High Performance</td>
</tr>
<tr>
<td>9:30</td>
<td>Step 2 – It starts at the top</td>
</tr>
<tr>
<td>10:00</td>
<td>Break</td>
</tr>
<tr>
<td>10:15</td>
<td>Step 3 – Engage First-Line Leaders</td>
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<tr>
<td>11:00</td>
<td>Step 4 – Communicate, Communicate, Communicate</td>
</tr>
<tr>
<td>12:00</td>
<td>Lunch</td>
</tr>
<tr>
<td>1:00</td>
<td>Step 5 – Individualize Engagement</td>
</tr>
<tr>
<td>1:30</td>
<td>Step 6 – Create a Motivational Environment</td>
</tr>
<tr>
<td>2:45</td>
<td>Break</td>
</tr>
<tr>
<td>3:00</td>
<td>Step 7 – Create Feedback Mechanisms</td>
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<td>3:30</td>
<td>Step 8 – Reinforce and Reward the Right Behaviors</td>
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<td>4:00</td>
<td>Step 9 – Track and Communicate Progress and Success</td>
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<td>4:30</td>
<td>Step 10 – Hire and Promote Engaged Employees</td>
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<tr>
<td>4:50</td>
<td>Wrap up</td>
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</tbody>
</table>

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Your Leadership Engagement Action Plan

“Own it” (What needs to change?)
• Push decisions down more; give direct reports more authority, a sense of ownership, and visibility

“Do it” (How should you do it?)
• Focus on delegating decisions for the X project
• Ask Tom and Amy to take on 80% of the process task force
• Observe how John pushes decisions down in meetings next month
• Ask direct reports more questions vs. provide answers

“Measure it” (How to determine accountability/results)
• Share my goal and get feedback from my supervisor and direct reports once a month

Your Leadership Engagement Action Plan

What to do with action plan

— Today
  • Complete each category with 1-2 commitments per category

— After you leave this workshop
  • We suggest you meet with your manager and direct reports to review your Leadership Engagement Plan
Ten Steps that Drive Employee Engagement Results

Step 1
Link to High Performance
- Define Engagement
- Making the Business Case for Engagement
STEP 1 – Link to High Performance

Define engagement

Engagement is unlocking your employee’s potential to drive high performance

It is a mutual commitment resulting in the capture of discretionary effort
STEP 1 – Link to High Performance

Making a business case for engagement – the 3 business drivers

Voluntary turnover

Disengaged Workforce

Engaged Workforce

Demographic shifts

11.2% decline in EPS

3.8% less net income

27.8% improvement in EPS

34% decreased operating income

19.2% higher operating income

3.8% less net income

17% higher operating margin

27.8% improvement in EPS

Additionally, disengaged employees are absent 3.5 days more per year

Conference Board Research
Towers Perrin Talent Report
International Survey Research (ISR)

STEP 1 – Link to High Performance

Leadership Action Plan

- A few Step 1 ideas have been included on your Action Plan
- What does your company do to support high performance

What We Covered

- Define Engagement
- Making the Business Case – The Four Business Drivers
Step 2
It Starts at the Top

- Leaders Have to Own It and Walk the Talk
- Greed is NOT Good
- Budget for Engagement
- Team Development

STEP 2 – It Starts at the Top
Leaders must walk the talk

A Tale of
Two
Captains
STEP 2 – It Starts at the Top

Leaders must walk the talk

Who Walked the Talk (and Who Didn’t)?

1. With your partner, discuss when you’ve worked with a leader where the leader “Walked the Talk”

2. What can you do to ‘walk the talk’?

3. Report back

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STEP 2 – It Starts at the Top

Team development

- Mutual trust
- Leadership
- Focused
- Interaction
- Open communications
- Decisive
- Individual self esteem
- Problem solving
- Common goals
- Nimble
- Decision-making power
- Involvement
- Accessible/visible
- Balanced
- Conflict resolution
- Respected
- Clarity of roles
**STEP 2 – It Starts at the Top**

*Team Development*

**Performing**
- Feeling excited about participating in team activities
- Feeling team strength
- Showing high confidence in accomplishing tasks
- Sharing leadership
- Performing at high levels

**Forming**
- Feeling moderately eager
- Anxiety
- Where do I fit? What is expected of me?
- Testing the situation and people

**Storming**
- Discrepancy between hopes and reality
- Feeling frustrated, incompetent, and confused: anger around goals, tasks, and action plans
- Reacting negatively toward leaders and other members
- Competing for power and/or attention

**Norming**
- Resolving discrepancies
- Developing trust, support, and respect
- Developing self-esteem and confidence
- Being more open and giving more feedback
- Sharing responsibility and control
- Using team language

Source: Tuckman
STEP 2 – It Starts at the Top

Leadership Action Plan

• Own it - list at least one thing you feel need to change
• Do it - write a brief description of how you will change in that area
• Measure it - list the measurements you will use to track your success

What We Covered

• Leaders have to own engagement and walk the talk
• Greed is NOT good
• Engagement is not free – it requires a budget
• Developing high performing teams is essential to engagement
The #1 driver of employee engagement is one’s first line supervisor*

Disengaged managers are 3 times more likely to have disengaged employees**

* Gallup survey of 80,000 Global Employees
** 2009 Sirota Intelligence Study
STEP 3 – Engage First Line Leaders

Train your leaders on engagement

Leadership Action Plan

• **Own it** - list **at least one** thing you feel need to change
• **Do it** - write a brief description of how you will change in that area
• **Measure it** - list the measurements you will use to track your success

Two tools you can use to ask your employees to evaluate you on the 12 Needs

What We Covered

• Train your leaders on engagement
• Set consistent leadership expectations
• Leadership is where it all starts
STEP 4 – Communication, the Cornerstone of Engagement

Communication protocol – your communication promise

Goals of a communication protocol
• Establish communication expectations and process
• Reinforce key elements of your strategic plan
  – Health and Safety
  – Profit
  – Growth
  – Engagement
• Create alignment with employees at all levels
• Reinforce communications (“13x Rule”)
### STEP 4 – Communication, the Cornerstone of Engagement

*Communication protocol – your communication promise*

<table>
<thead>
<tr>
<th>Message</th>
<th>Who Delivers</th>
<th>Venue</th>
<th>Audience</th>
<th>Frequency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Company Update</td>
<td>CEO</td>
<td>Email and Town Hall</td>
<td>All Employees</td>
<td>Monthly</td>
</tr>
<tr>
<td>Business Line Update</td>
<td>Business Line Leaders</td>
<td>Blogs, Tweets</td>
<td>Matrix Employees</td>
<td>Bi-Monthly</td>
</tr>
<tr>
<td>Sales, HR, Finance, etc.</td>
<td>Function Head</td>
<td>Email / Meetings</td>
<td>All employees</td>
<td>Monthly</td>
</tr>
<tr>
<td>Department Update</td>
<td>Line Managers</td>
<td>One on one meetings</td>
<td>Direct Reports</td>
<td>Monthly</td>
</tr>
<tr>
<td>Innovation Update</td>
<td>All Employees</td>
<td>Email /text Dept. meetings</td>
<td>Managers and above</td>
<td>Always</td>
</tr>
</tbody>
</table>

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STEP 4 – Communication, the Cornerstone of Engagement

Is social media a fad?

Social Media as a Communication Tool

What is your Social Media Policy?

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* Manpower
** Robert Half

Who sets policy?
STEP 4 – Communication, the Cornerstone of Engagement

*Leverage communication technology*

**Exercise** – Make a Video

In your groups and using an iPhone or Droid, create a ‘company video’ highlighting one of the following:

- Introducing new employee to the company
- Announcement and introduction of a new VP
- Introduction and marketing plan for a new product

**Leadership Action Plan**

- **Own it** - list **at least one** thing you feel need to change
- **Do it** - write a brief description of how you will change in that area
- **Measure it** - list the measurements you will use to track your success

**What We Covered**

- Create your own Communication Protocol
- Leverage communication technologies and apply it to the 13 X factor
- Look at how you brand your company for your employees
- How are you using social media?
- Keep communications transparent, simple, and execute flawlessly
STEP 5 – Individualize Engagement

By generation

“It’s time to rethink what you think you know about managing people”

Eric McNulty – Harvard Management Update
**STEP 5 – Individualize Engagement**  
*By generation*

**Achievement**
- Pride in one’s work
- Professionalism
- Capable workforce and leaders

**Camaraderie**
- Inclusiveness
- Productive relationships

**Equity and Ethics**
- Fair pay, benefits, rewards, development opportunities, growth, etc.
- Integrity

**Exercise: Addressing commonalities**

In your groups, make a list of actions you are taking in your organization to address your assigned common areas.

Use this worksheet in your workbook to jot down ideas you can use for your organization.
**STEP 5 – Individualize Engagement**

**Exercise** – Using diversity information

Using the information about the Inclusion Model in your workbook, select 3 – 4 areas of diversity and note how those could benefit your organization.
**STEP 5 – Individualize Engagement**

**Leadership Action Plan**
- **Own it** - list at least one thing you feel need to change
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**What We Covered**
- Four generations at work, each with their own strengths and challenges
- Diversity – it’s not all about equity anymore
- After 3 – 4 years, your staff may be thinking about leaving

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**Step 6 – Create a Motivational Culture**
- Know Your Employees
- Develop Yourself and your Staff
- Innovate
- Create Alignment

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STEP 6 – Create a Motivational Culture

Know your employees

Exercise – What motivates you?

Individually on the form in your workbook

– Force rank yourself, numbering each motivator 1 – 7, using each number only once.
– Use ‘1’ as your primary motivator and label what motivates you the least as ‘7’

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STEP 6 – Create a Motivational Culture

*Develop yourself and your staff*

- Brown bags
- External seminars/conferences
- Tuition assistance
- Self-study/certification programs
- Books/Articles

- Self assessment
- Objective feedback, 360
- Note strengths and potential
- Mentors
- Knowledge sharing
- Bring to mgmt or client meetings

- Delegate/Provide added responsibility, visibility
- Autonomy to solve problems on own
- New role or stretch assignments (scope, fix-it, line to staff, etc.)

Help to reflect on, and learn from, mistakes
Provide perspective; reassurance after setbacks
STEP 6 – Create a Motivational Culture

Create Alignment

Between “Where I am Today” and “Where am I Going”

Between “My Job” and “Where is the Company Going?”

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**STEP 6 – Create a Motivational Culture**

Leadership Action Plan
- **Own it** - list at least one thing you feel need to change
- **Do it** - write a brief description of how you will change in that area
- **Measure it** - list the measurements you will use to track your success

What We Covered
- Get to know your employees – use the 7 motivators
- Develop yourself and your staff
- Make it safe to innovate and be creative
- Ensure alignment with your employees

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**Step 7**
Create Feedback Mechanisms
- Pulse Surveys
- 360s and Performance Appraisals
- Open Forums
STEP 7 – Create Feedback Mechanisms

360 Feedback and Performance Appraisals

1. Look for opportunities - especially in turnaround situations, hardships, and / or when high performance is “standard”

2. Communicate the situation
   – What you observed

3. Communicate the consequences/impact of the action
   – Explain what happened (or could have happened) as a result

4. Reward the action/Ask for action
   – Reward and recognize the behaviors you want to reinforce
   – Describe what you want to see in the future for behaviors you want to correct

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STEP 7 – Create Feedback Mechanisms

Resource Matrix

<table>
<thead>
<tr>
<th>Performers</th>
<th>Investment</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
<td>High</td>
</tr>
<tr>
<td>Low</td>
<td>Low</td>
</tr>
</tbody>
</table>

Performance

Potential

Leadership Action Plan

• Own it - list at least one thing you feel need to change
• Do it - write a brief description of how you will change in that area
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What We Covered

• Pulse surveys
• Using 360 and performance appraisals
• Open forum ideas to gather feedback
Step 8 – Reinforce and Reward the Right Behavior

Recognition

Companies with recognition programs vs. without recognition programs (Answering “yes”)

- Employees are satisfied with the level of recognition they receive for doing a good job:
  - 34% (Recognition Programs)
  - 18% (Companies without Recognition Programs)

- Managers/supervisors effectively acknowledge and appreciate employees:
  - 36% (Recognition Programs)
  - 36% (Companies without Recognition Programs)

- Employees are rewarded according to their job performance:
  - 64% (Recognition Programs)
  - 36% (Companies without Recognition Programs)

SHRM 2012 Global Survey

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STEP 8 – Reinforce and Reward the Right Behavior

Ask Yourself:

Rewards/Recognition

Available to everyone
Related to an outcome
Delivered consistently
Valued by employees

STEP 8 – Reinforce and Reward the Right Behavior

Leadership Action Plan
• Own it - list at least one thing you feel need to change
• Do it - write a brief description of how you will change in that area
• Measure it - list the measurements you will use to track your success

What We Covered
• Money doesn’t matter as much as you might think
• Measuring achievement is key to engagement
• Establish accountability in order to recognized appropriately
• Recognition doesn’t have to be hard (or expensive)
STEP 9 – Track and Communicate Progress

What to measure

<table>
<thead>
<tr>
<th>Metric</th>
<th>Company Average</th>
<th>Top 25% CSC's</th>
<th>Year-to-Date</th>
<th>Year-to-Date</th>
<th>Jul 02</th>
<th>June</th>
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<tbody>
<tr>
<td>Health and Safety</td>
<td></td>
<td></td>
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<tr>
<td>Lost Time Case Rate</td>
<td>2.22</td>
<td>2.0</td>
<td>0.7</td>
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<tr>
<td>Employee Wellness</td>
<td>Currently undefined</td>
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<td>Employee Engagement</td>
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<tr>
<td>Training % of Payroll (Training labor, discretionary and Dues + Memberships)</td>
<td>6.4</td>
<td>5.9</td>
<td>5.9</td>
<td>6.2</td>
<td>5.4</td>
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<tr>
<td>Turnover-Total % (annualized)</td>
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<td>Turnover-Voluntary % (annualized)</td>
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<td>Employee Satisfaction Survey</td>
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<td>30</td>
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<td>DPO % Completion</td>
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<td>Cost Management</td>
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<td>Overall Raw Cost for Facilities (w/o depreciation) (DOSO)</td>
<td>4,922</td>
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<td>S/FTE for Total Discretionary</td>
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<td>DSO</td>
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<td>Profitability</td>
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<td>Total Utilization % ($ Weighted)</td>
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<td>58.2</td>
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<td>CSC Contribution (Gross $)</td>
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<td>237,0</td>
<td>204,0</td>
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STEP 9 – Track and Communicate Progress  
*Highlight the positives and celebrate success*

**Exercise** – Measuring your ROI

At your tables discuss:
- What should be tracked in order to measure engagement?
- How should we communicate progress to our employees?
- How would you celebrate success?

Be prepared to report back
**STEP 9 – Track and Communicate Progress**

**Leadership Action Plan**
- **Own it** - list at least one thing you feel need to change
- **Do it** - write a brief description of how you will change in that area
- **Measure it** - list the measurements you will use to track your success

**What We Covered**
- Measuring the return on investment helps to make the business case
- Don’t keep the news a secret – communicate progress
- Highlight the positives and address the negatives
- Celebrate success

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**Step 10**

Hire and Promote the Right Behaviors and Traits

- The B.E.S.T Profile
- Sales Focused
- Tri-branding Opportunities

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STEP 10 – Hire/Promote the Right Behaviors and Traits

The B.E.S.T Profile

Today and in the Future
(dynamic)

B.E.S.T. Profile

Success characteristics
Identify behaviors and traits of high performance
Include in Selection
Modify job to fit candidate
STEP 10 – Hire/Promote the Right Behaviors and Traits

The B.E.S.T Profile

Leadership Action Plan

- **Own it** - list **at least one** thing you feel need to change
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What We Covered

- Use the BEST Profile to determine hiring needs
- Your employees and customers should be your advocates
- Conduct ‘Stay Interviews’ to reduce ‘Exit Interviews’
Thank You

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