



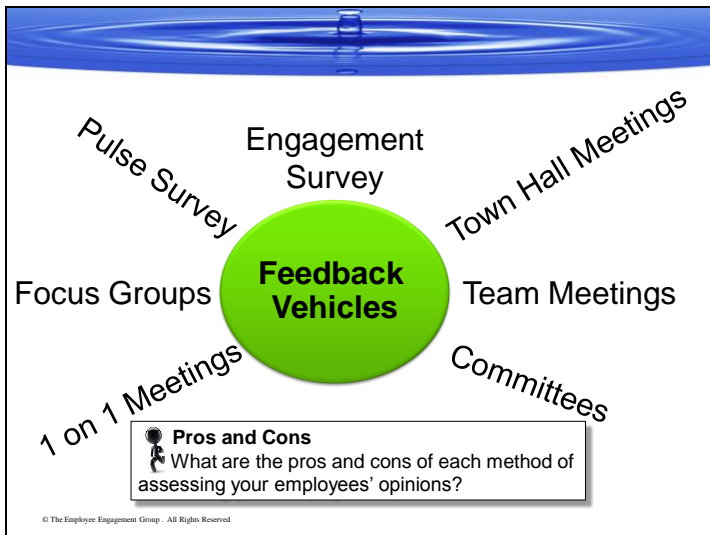
Session 2

Assessing and Acting *Your Engagement Baseline*

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Gathering Employee Feedback

from potential to performance 



Feedback Tool

Pros

Cons

**Engagement
Survey**

Pulse Surveys

**Town Hall
Meetings**

**Team
Meetings**

Continued on next page

Feedback Tool *(continued)*

Pros	Cons
Committees	
1 on 1 Employee Meetings	
Focus Groups or Think Tanks	
Other	

Listen and be prepared to act



- Feedback must lead to action
- Create complete project plan including:
 - Methods for capturing feedback and ideas
 - Action planning sessions
 - Follow up strategy
- Recognize what you can and cannot change

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- Equal mix of leadership and non-members of Leadership team
- Evaluate results of data
 - Strengths
 - Challenges
- Make recommendations
- Recognize that you can't do it all
- Repeat formula for local sub-committees
 - Develop action plans

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Creating the best team:

- Diversity of your 8 – 16 members
- Volunteers and high performers
- Seek fresh eyes and shared ownership

Deputize and empower to:


- Prioritize
- Present to leadership
- Follow up and follow through

Create a Communication Plan



- Commission a communication team to develop a plan
 - Macro results to senior leadership
 - Outline results for employee base
 - Identify both strengths and challenges
- Communicate:
 - Actions to be taken
 - What will not be addressed (either this time or ever)
- Schedule multiple communications
 - It's not a one-time activity

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action plan

Adopt a Common Action Plan Template

- What does your action plan look like?
- Share action plans with
 - Leadership team
 - All employees
 - Other departments

Action Plan for [name of project]					
Location	Date	Specific Action	Responsible Person	Start Date	End Date
		Check the Specialist web site for an easy-to-use Action Planning worksheet			

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Keep it Simple
Execute Flawlessly

- What are the consequences of under-delivering on your promise?

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Plan for Follow-up

- 1) Follow Up
- 2) Follow Up
- 3) Follow Up
- 4) Follow Up
- 5) Follow Up

- What follow-up mechanisms have you used when collecting employee information?
- Who is responsible for follow-up?
- Best practices include:
 - Assign follow-up to committees and sub-committees
 - Schedule follow up activities on a regular basis
 - Use technology (but don't rely on it – the human touch is important)

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Partner with a Consulting Firm

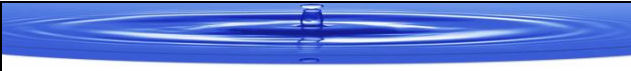


What's important to you in a partner?


- Quick turn-around
- Normative data
- Cost
- Flexibility
- Credibility
- Languages
- Customizable
- Filters
- Reporting (ease, thorough)
- Presentation of material
- Services after

You May Not Get it All
On the worksheet in your workbook, rank order the criteria that's important to you to help you determine your needs

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**Invest Less in Technology
More in Solutions**



Use your Rank Order exercise to help determine your technology provider

- Could you use your own technology?
 - Pros and cons
- Recognize that solutions don't come from the technology
- What providers have you used?

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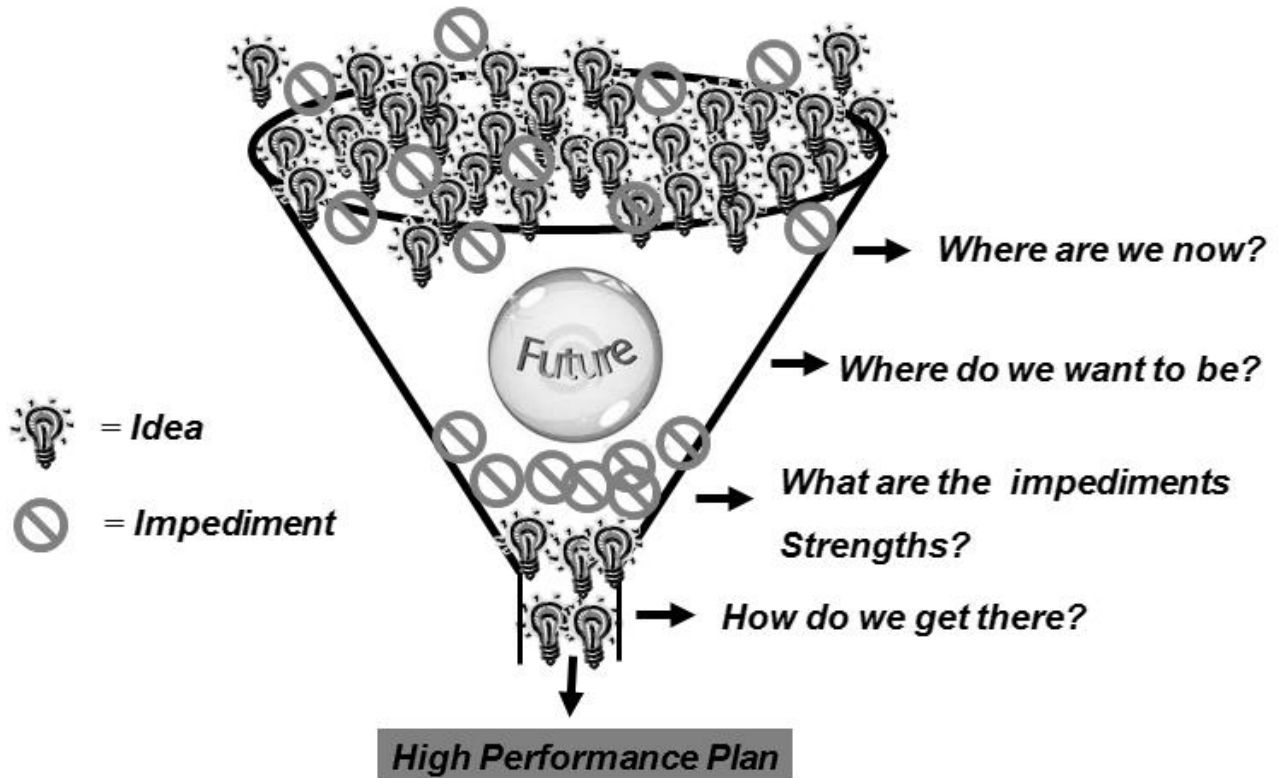
Partnering with Consulting Firms on Surveys

Count the number of categories below (including any you've added). Force rank your needs for a survey partner to help you identify the best provider for your specific organization.

Category	Description	Rank
Cost of survey process	<i>We have a limited budget for completing the engagement survey</i>	
Credibility of partner	<i>We need to use a well-known survey provider like a Gallup or Towers Watson</i>	
Customizable	<i>We have specific needs and can't use an out of the box</i>	
Filter options	<i>We want to be able to drill down into multiple levels of employee data (by department, location, manager, etc.)</i>	
Flexibility	<i>Our time frame is in flux – we need the survey provider to be able to kick off the survey at a moment's notice</i>	
Global	<i>We need to deliver this survey in multiple offices across multiple countries</i>	
Guidance during process	<i>We know very little about conducting a survey and need my provider to give me specific guidance</i>	
Languages	<i>We need to deliver this survey in multiple languages</i>	
Normative data (industry)	<i>We want to see normative data that is specific to our industry</i>	
Normative data (size)	<i>We want to compare our data to companies of our size (no matter what the industry)</i>	
Online survey option	<i>Our survey must be done online in a secure environment</i>	
Paper survey option	<i>Some of our employees are remote without access to a computer – they will need a paper version of the survey</i>	
Presentation of material	<i>We want our survey provider to deliver the initial results to our leadership team</i>	
Quick turnaround	<i>We need to have a quick turn-around from start of survey to finish</i>	
Reporting	<i>We want reports that are easy to read while being thorough</i>	
Services	<i>We want a provider that offers services after the survey such as consulting and training</i>	
Other		
Other		
Other		

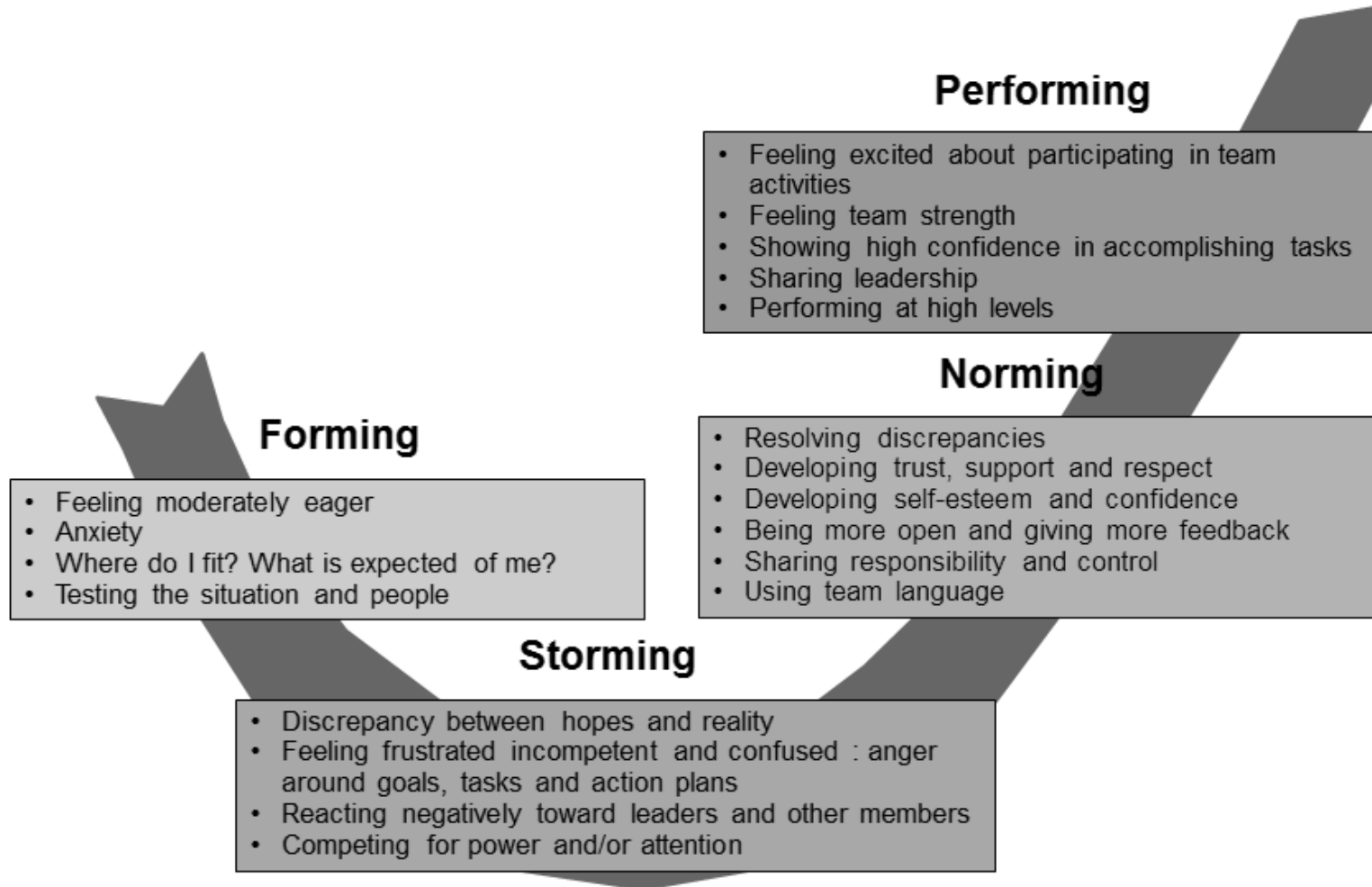
After the Survey

After conducting the survey and reviewing the results, it's important to decide on actions.



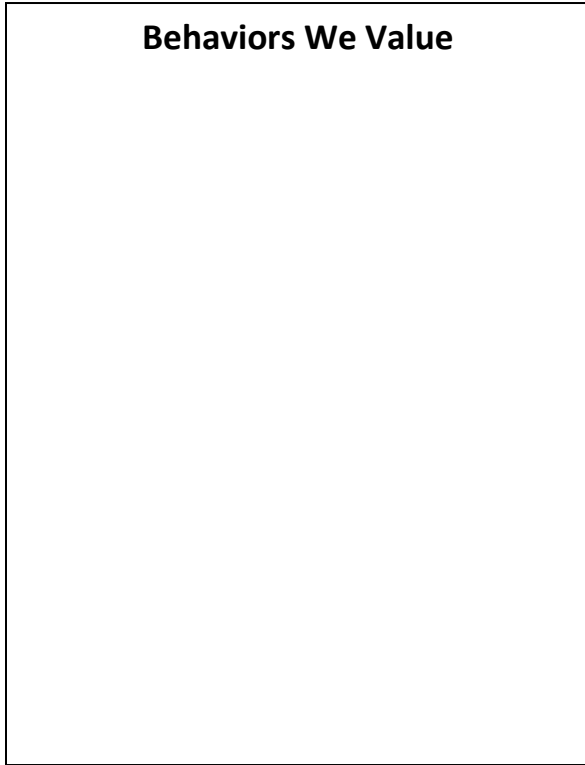
SWOT Analysis

	Helpful	Harmful
Internal	<p>Strengths</p> <ul style="list-style-type: none"> • What's working well? • What's making a difference? • What value do we bring to our customers? • What do we do really well? • What are our differentiating factors? 	<p>Weaknesses</p> <ul style="list-style-type: none"> • What is not working well? • Not is not making a difference? • What processes need improving • What hinders our sales? • What do our customers dislike?
External	<p>Opportunities</p> <ul style="list-style-type: none"> • What needs to be improved or changed? • What should we stop doing? • What should we start doing? • What is missing that we need to be doing? 	<p>Threats</p> <ul style="list-style-type: none"> • What is threating our business? • Customer trends? • Tech trends? • Economic trends? • Financial threats: Costs? Revenue? Debt? Cash-flow?



Our Agreement

Behaviors We Value



Unacceptable Behavior

