



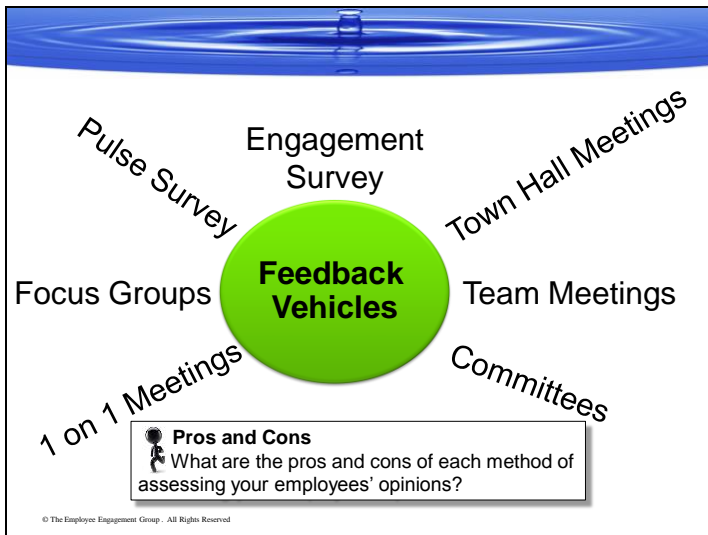
## **Session 2**

# **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
<b>Committees</b>	
<b>1 on 1 Employee Meetings</b>	
<b>Focus Groups or Think Tanks</b>	
<b>Other</b>	


**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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**Create Committee and Sub-committees**



- 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:					
Week	Start	Opportunity Identified	Specific Action	Responsible Person	Progress/Status
			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**

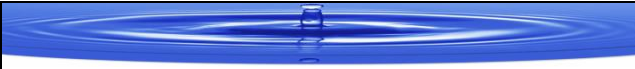


**What's important to you in a partner?**


- 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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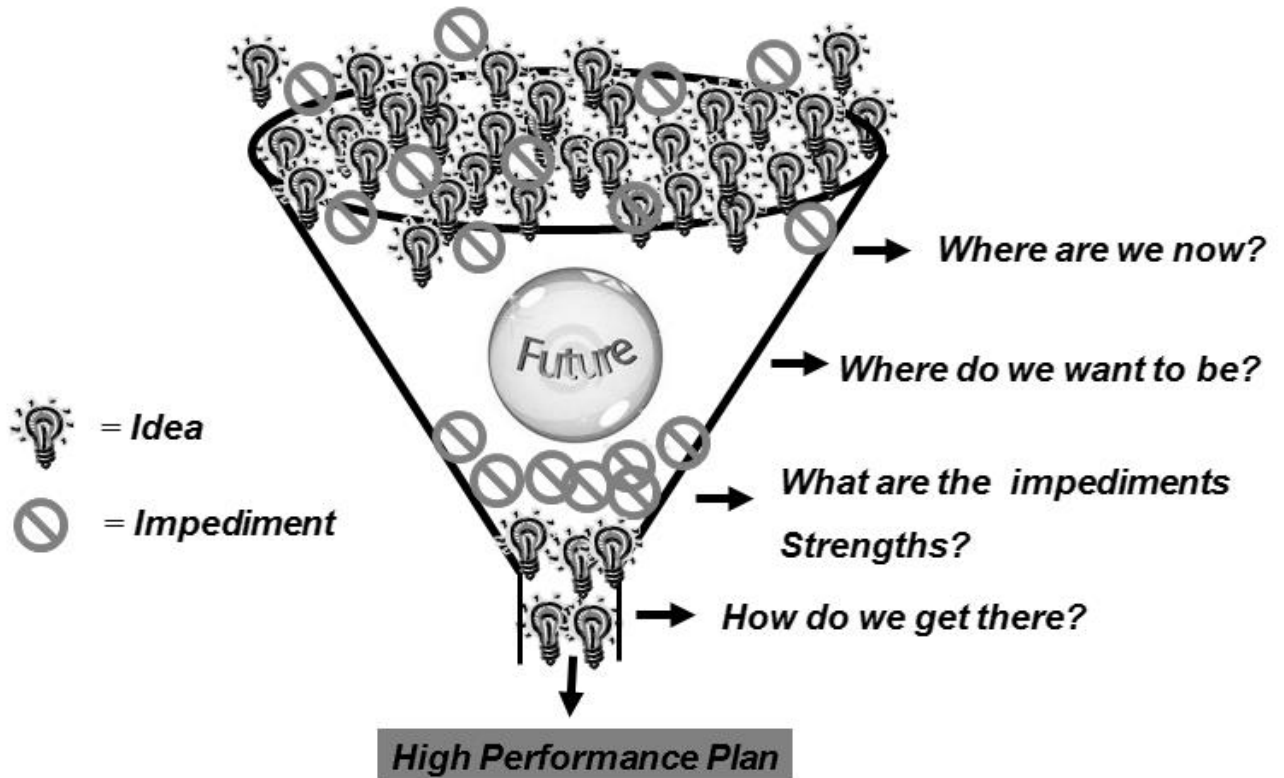
### Partnering with Consulting Firms on Surveys

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		

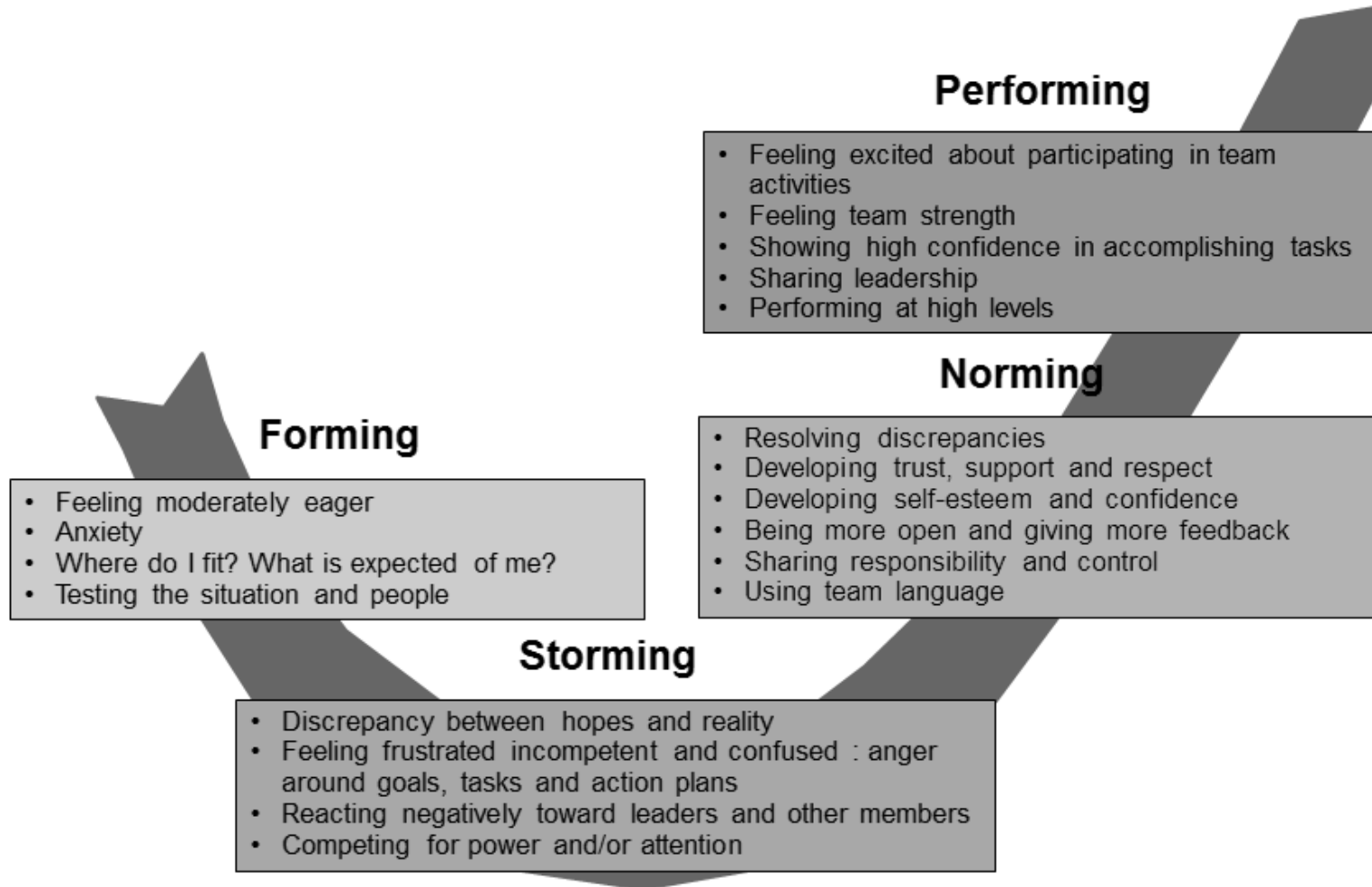
### After the Survey

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



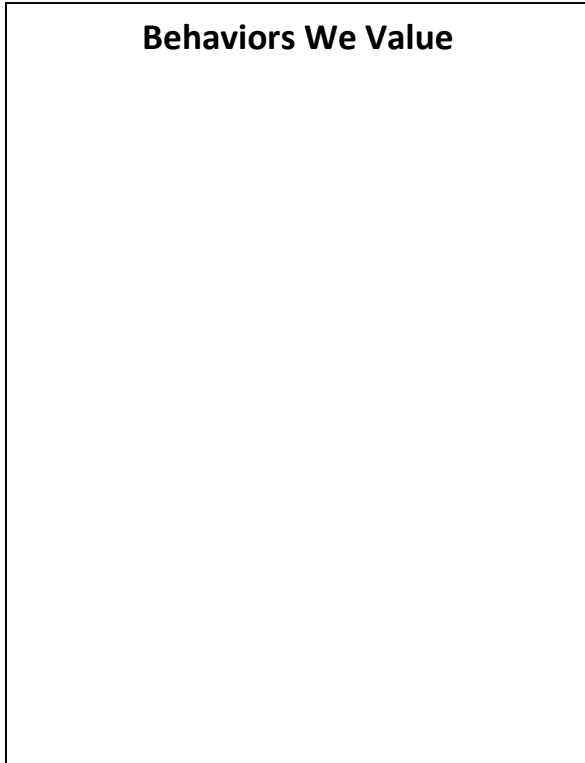
SWOT Analysis

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

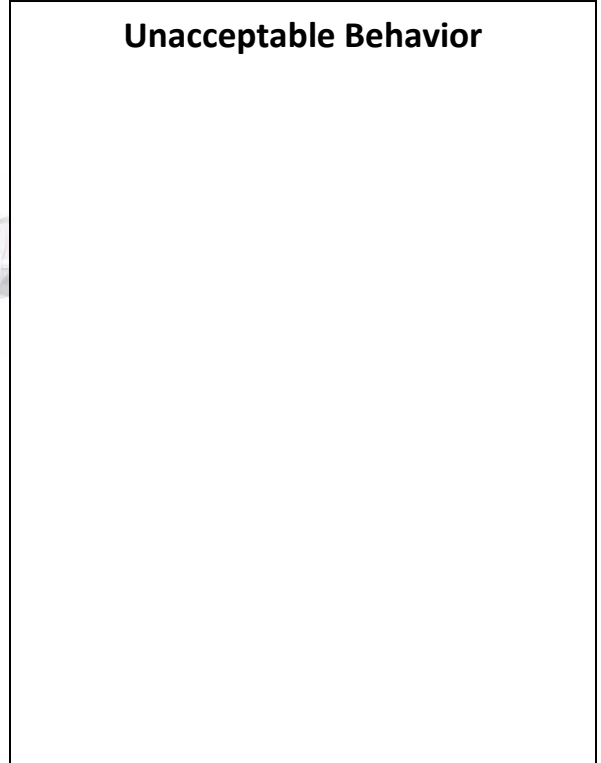


# Our Agreement

**Behaviors We Value**



**Unacceptable Behavior**



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