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Engagement Philosophy

Engagement does not have to be a complex or complicated process. It is about being aware of the basic needs employees need met to successful and managing with these needs in mind.

DON'T

- view engagement as a separate or temporary initiative
- place a sole focus on the survey event
- think of scores like a grade
- focus primarily on raising the numbers
- try to action on all results or make huge changes

DO

- integrate engagement into how you support your teams
- focus on the understanding employee needs and being intentional about meeting those needs
- consider how to make tweaks or adjustments to current practices
- utilize resources for recommended action
- pick <u>one thing</u> to work on as a team

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engaged employees

Employees who are highly involved in and enthusiastic about their work and workplace. They are psychological "owners," drive performance and innovation, and move the organization forward.

Employee engagement measures the involvement and enthusiasm of employees in their work and workplace. Employees can become engaged when their basic needs are met and when they have a chance to contribute, a sense of belonging, and opportunities to learn and grow.

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Engagement Segments Within U.S. Workplaces

Employees can be segmented into three fundamental psychological conditions of engagement that are behaviorally predictive.

30%
ENGAGED

Engaged employees are highly involved in and enthusiastic about their work and workplace. They are psychological "owners," drive performance and innovation, and move the organization forward.

53%
NOT ENGAGED

Not engaged employees are psychologically unattached to their work and company. Because their engagement needs are not being fully met, they're putting time — but not energy or passion — into their work.

17%
ACTIVELY DISENGAGED

Actively disengaged employees aren't just unhappy at work — they are resentful that their needs aren't being met and are acting out their unhappiness. Every day, these workers potentially undermine what their engaged coworkers accomplish.

BEST-PRACTICE ORGANIZATIONS

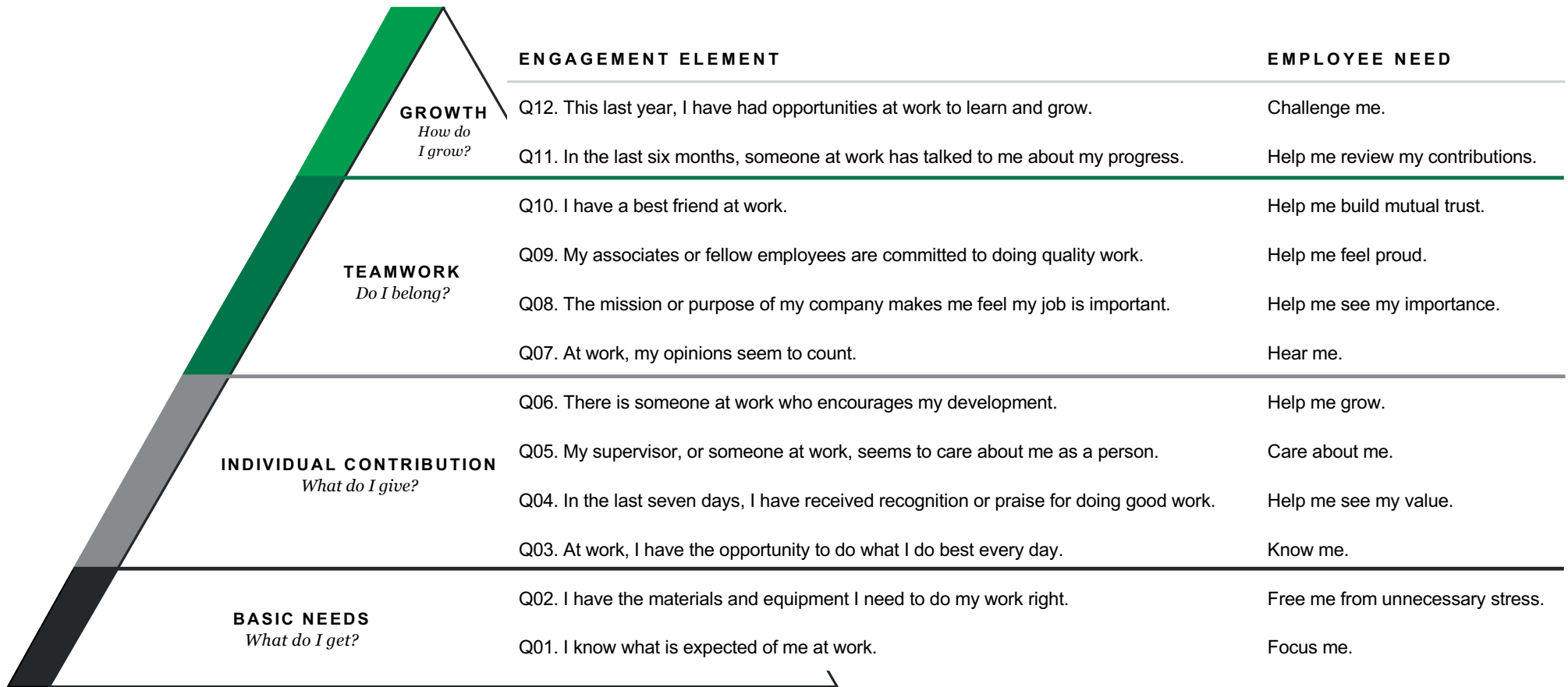| 70%	25%	5%

WF Q2 2024, U.S. Employees MOE: ±1 point. Percentages for best-practice organizations are averages across 2024 Gallup Exceptional Workplace Award winners; percentages reflect the year that Gallup collected the winners' engagement data (2022) — not the year that Gallup named the award winners.

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The Four Levels and 12 Items That Matter for Engagement — Gallup's $Q^{12\circledR}$

	ENGAGEMENT ELEMENT	EMPLOYEE NEED
GROWTH *How do I grow?*	Q12. This last year, I have had opportunities at work to learn and grow.	Challenge me.
	Q11. In the last six months, someone at work has talked to me about my progress.	Help me review my contributions.
TEAMWORK *Do I belong?*	Q10. I have a best friend at work.	Help me build mutual trust.
	Q09. My associates or fellow employees are committed to doing quality work.	Help me feel proud.
	Q08. The mission or purpose of my company makes me feel my job is important.	Help me see my importance.
	Q07. At work, my opinions seem to count.	Hear me.
INDIVIDUAL CONTRIBUTION *What do I give?*	Q06. There is someone at work who encourages my development.	Help me grow.
	Q05. My supervisor, or someone at work, seems to care about me as a person.	Care about me.
	Q04. In the last seven days, I have received recognition or praise for doing good work.	Help me see my value.
	Q03. At work, I have the opportunity to do what I do best every day.	Know me.
BASIC NEEDS *What do I get?*	Q02. I have the materials and equipment I need to do my work right.	Free me from unnecessary stress.
	Q01. I know what is expected of me at work.	Focus me.

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Q^{12+}— Meeting Demands of the New Will of the Workplace

Recommended items to add to the Gallup Q^{12} to align with the needs of today's workforce

Key Workplace Issues That Present Threats and Opportunities for Leaders in Today's Workplaces

Items That Best Measure the Key Workplace Issues

- Diversity, equity and inclusion ⟶ • **Respect:** At work, I am treated with respect.

- Wellbeing, burnout and mental health ⟶ • **Wellbeing:** My organization cares about my overall wellbeing.

- Performance management ⟶ • **Coaching habit:** I have received meaningful feedback in the last week.

- Customer retention ⟶ • **Customer:** My organization always delivers on the promise we make to customers.

Employee Engagement Shapes Work and Life Experiences

THE EMPLOYEE EXPERIENCE
Engaged vs. Not Engaged or Actively Disengaged Employees

Engaged employees are:

70%
less likely to feel **burned out** at work very often or always

48%
less likely to be watching for or actively **seeking a new job**

5.9x
as likely to strongly agree they would **recommend their organization** as a great place to work

LIFE EXPERIENCES
Engaged vs. Not Engaged or Actively Disengaged Employees

Engaged employees are:

61%
more likely to be **thriving in life** (based on their life evaluation)

36%
less likely to say they experienced **worry** during a lot of the previous day

30%
less likely to say they experienced **stress** during a lot of the previous day

Analysis based on WF Q1 2024 survey

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Managers That Enter Action Plans Saw **Double** the Growth in Their Team's Engagement

Best practice managers and leaders utilize Q^{12} item data to have team conversations and create a team action plan to change behaviors.

■ Pre ■ Post

	Action Plan	No Action Plan
Pre	3.65	3.71
Post	3.88	3.82
Growth	+.23	+.11

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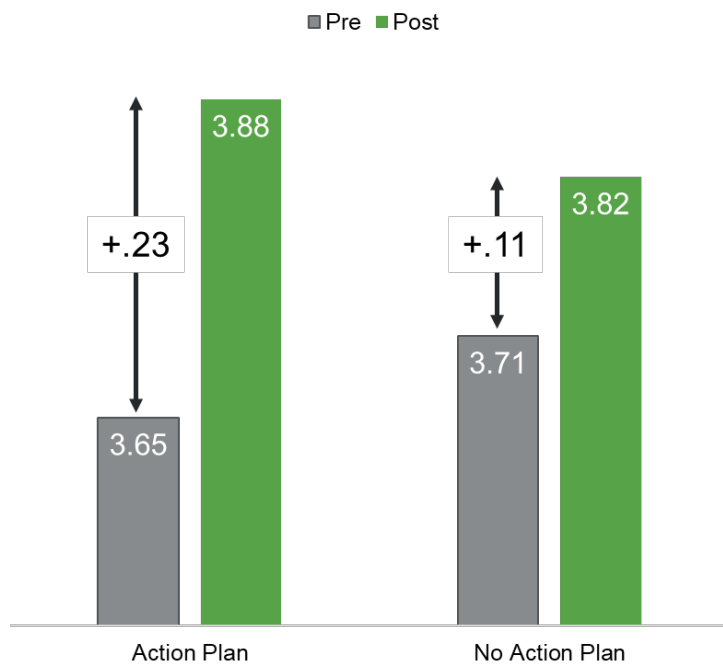
Employee Engagement Item-Level Results

Example of the impact of action planning

Legend: ■ 1 (Strongly Disagree) ■ 2 ■ 3 ■ 4 ■ 5 (Strongly Agree)

n-size = 121

Category	Item	1	2	3	4	5	P'TILE	CURRENT MEAN	MEAN Δ	PAST MEAN
ENGAGEMENT MEAN							27th	3.77	+0.31 ▲	3.46
	Q00 Overall Satisfaction	5	13	24	37	21	20th	3.55	+0.25 ▲	3.30
GROWTH How do I grow?	Q12 Learn & Grow	8	8	13	28	44	50th	3.93	+0.37 ▲	3.56
	Q11 Progress	8	11	18	27	36	46th	3.73	+0.45 ▲	3.28
TEAMWORK Do I belong?	Q10 Best Friend	13	14	22	26	25	64th	3.36	+0.28 ▲	3.08
	Q09 Quality			22	28	43	29th	4.05	+0.25 ▲	3.80
	Q08 Mission	6	13	17	25	40	26th	3.79	+0.27 ▲	3.52
	Q07 Opinions	15	15	17	24	30	11th	3.39	+0.23 ▲	3.16
INDIVIDUAL What do I give?	Q06 Development	8	13	15	22	43	32nd	3.78	+0.32 ▲	3.46
	Q05 Cares	7	11	11	21	50	13th	3.95	+0.29 ▲	3.66
	Q04 Recognition	23	9	10	24	33	26th	3.35	+0.46 ▲	2.89
	Q03 Do Best		6	20	39	32	47th	3.90	+0.32 ▲	3.58
BASICS What do I get?	Q02 Materials		10	15	25	46	35th	3.99	+0.39 ▲	3.60
	Q01 Expectations	5		16	35	41	18th	4.04	+0.06	3.98

Action Planning in Three Steps

1. **Step One: Prepare**

   1. Export team Q12 results from Gallup Access in one pager. Identify the team's highest Q12 items for team discussion.

   2. For lowest Q12 items, click "**Get Advice**" to download the conversation guide for the team discussion

2. **Step Two: Team Discussion and Action Plan**

   1. Thank your team. Share overall team scores.

   2. Celebrate your team's highest scores.

   3. Discuss lowest scores using the discussion questions on the three-page reference document.

   4. As a team, determine what <u>one item </u>to work on and a reasonable action plan to improve that item.

3. **Step Three: Follow-Through**

   1. Enter actions into action planning tool in Gallup Access.

   2. Follow-up on action plan monthly with your team to ensure progress and adjust as needed.

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Step One: Prepare

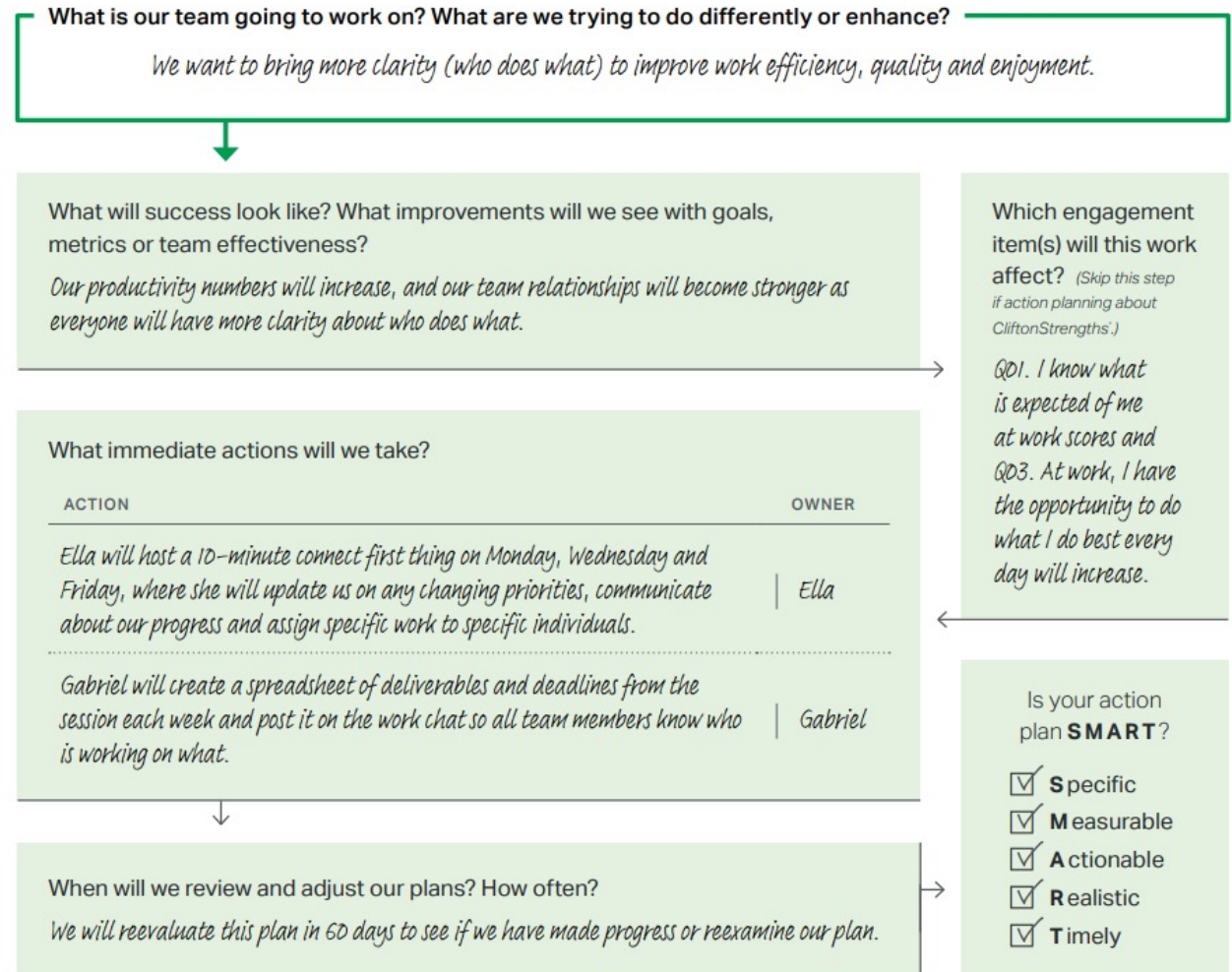Prepare for your team discussion by reviewing your team's results in Gallup Access.

Keep in mind the following when reading your results:

- Pay close attention to Q01-Q06.
- Focus on the high scores and look for recognition opportunities.
- Think about where your team might experience the biggest increase in engagement.
- Interpretations of the Q^{12} items can vary.
- A score of "5" represents that a need is consistently met. A score of "4" suggests that the need is often met, but not consistently so.
- Improving engagement is a team effort and does not fall to leaders alone.

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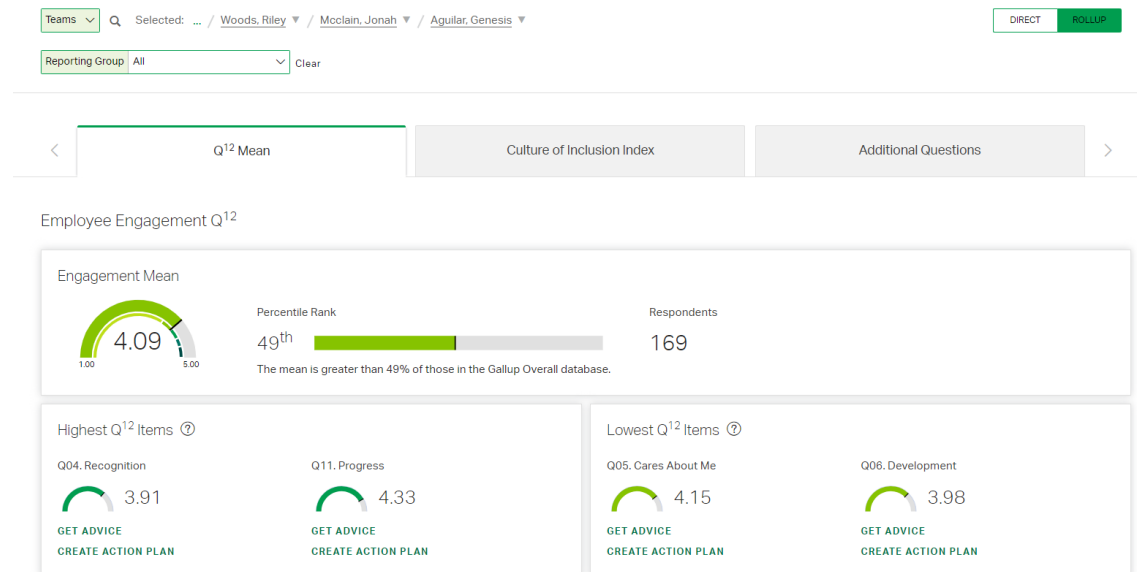
Step Two: Discuss and Plan

– Thank your team for participating and providing their feedback on the survey.

– Celebrate your team wins. What 1-2 areas did you score the highest?

– Discuss lowest scores using the discussion questions for that Q12 element.

– Through that conversation with your team, create an Action Plan based on the one item you decide to focus on.

What is our team going to work on? What are we trying to do differently or enhance?

We want to bring more clarity (who does what) to improve work efficiency, quality and enjoyment.

What will success look like? What improvements will we see with goals, metrics or team effectiveness?

Our productivity numbers will increase, and our team relationships will become stronger as everyone will have more clarity about who does what.

What immediate actions will we take?

ACTION	OWNER
Ella will host a 10-minute connect first thing on Monday, Wednesday and Friday, where she will update us on any changing priorities, communicate about our progress and assign specific work to specific individuals.	*Ella*
Gabriel will create a spreadsheet of deliverables and deadlines from the session each week and post it on the work chat so all team members know who is working on what.	*Gabriel*

When will we review and adjust our plans? How often?

We will reevaluate this plan in 60 days to see if we have made progress or reexamine our plan.

Which engagement item(s) will this work affect? *(Skip this step if action planning about CliftonStrengths.)*

Q01. I know what is expected of me at work scores and Q03. At work, I have the opportunity to do what I do best every day will increase.

Is your action plan **SMART**?

- ☑ **S**pecific
- ☑ **M**easurable
- ☑ **A**ctionable
- ☑ **R**ealistic
- ☑ **T**imely

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TEAM CONVERSATION DO'S & DON'TS

✓ DOs

- Manager is open and positions action planning as an improvement opportunity.
- The team speaks up; manager facilitates and listens.
- The team creates an action plan together.
- The whole team is committed to driving engagement.
- Focus on the positive and what the team can affect.
- The team decides and is always focused on at least one element to improve.
- Thank your team for participating.

✗ DON'Ts

- Manager is being dominant or defensive.
- Manager, not the team, creates an action plan.
- Manager tells associates how to answer the survey questions next time.
- The team is passive and has a "whatever" attitude.
- Focus only on the negative.
- Action plan is vague and unclear.

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Step Three: Follow Through

- Enter action plan into the online action planning tool.

- Follow-up on action plan with your team regularly to make sure they are implemented and drive positive change.

- Update your plan to make changes or mark complete.

- Review potential additional actions throughout the year to keep the process ongoing.

Clarify Expectations

MARK AS COMPLETE   MORE ∨

Employee Engagement Survey - Reports Demo - Hierarchy | Aguilar, Genesis

DUE DATE	TASKS	ISSUES	STATUS	CREATED
DEC 31, 2024	0	0	ACTIVE	AUG 27, 2024

Overview   Tasks   History

Plan Details

GOAL

Align on what is expected in my 1:1 conversations with each direct report.

RELATED ITEMS

- Q01. Know What's Expected

DESCRIPTION

Set clear objectives for what is expected in our 1:1s and use a structured format (quick check-in, review of current projects, discuss roadblocks, look at future goals)

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Step Three: Follow Through- Escalated Issues

- During your team discussion, if an issue arises that is out of your team's control, you can escalate an issue to your manager.

- See discussion points from the action planning tool to review with your team before escalating an issue.

- Once you have escalated an issue in Gallup Access, notify your manager of the issue that has been submitted to ensure they review it in a timely manner.

(Optional) Is there anything we learned that we need to escalate to upper leadership? Who should handle the escalation?

Excerpt from Action Planning Tool

- *What actions can top leaders take?*

- *How can we better equip top leaders to address our issue or concern?*

- *What are our best alternatives if the answer is no?*

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Example of Q4: In the last seven days, I have received recognition or praise for doing good work.

Employees who are not adequately recognized at work are twice as likely to say they'll quit in the next year.

❑ **Discussion Questions:**
  ❑ How do you like to receive recognition?
  ❑ What is the best recognition you have ever received?
  ❑ What type of recognition do you prefer? What are you most comfortable with?
  ❑ From whom would you like to receive recognition?
  ❑ Think of three colleagues who help you the most in your job. Have you thanked them or recognized them for their help?
  ❑ Who are your biggest cheerleaders at work? Who helps you believe in your success?
  ❑ How can we build a culture that encourages and values recognition and praise as a team?

❑ **Action Plan**

  ❑ Make recognition an agenda item at regularly scheduled meetings.

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Gallup Access Demo

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Appendix

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Example of Q2: I have the materials and equipment I need to do my work right.

- ❑ **Discussion Questions**
  - ❑ How did you interpret materials and equipment?
  - ❑ What do you need to get your job done?
  - ❑ What are the essentials? What materials and equipment are essential to doing your job well? How happy are you with the availability and functionality of each of these needs?
  - ❑ Does your work equipment (or lack thereof) lead to any stress? How can we help alleviate this stress?
  - ❑ Do you have all the information you need to do your job right?
  - ❑ Are there things that distract you or keep you from being positive, productive, or accurate in the work that you do?

- ❑ **Action Plan**
  - ❑ In regular meetings, ask staff to think about what they are working on and if they need anything to help do their work better.

On average, only one in three workers strongly agree that they have told their manager the one thing they need most to get their work done and why.

Managers with bottom-quartile performance on this measure average 20% to 40% higher employee attrition than their top-quartile peers. This represents millions of dollars in direct and indirect turnover costs.

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**To Embed Engagement and Core Behaviors Into
Your Management Style, Make Slight Shifts**

Consider making these slight shifts, or others:

- End each meeting with a review of what happens next. (Expectations)

- In 1-on-1 meetings, ask employees their opinions about changes upcoming or already made. Welcome their ideas. (Opinions count).

- Include departments with which your team collaborates into your strategy session. (Cooperation).

- Talk to each staff member about the best parts of their day and about how they like to be recognized. (Do best, Recognition).

- Discuss developmental ideas with each employee — what is the learning and development plan for each?

- Go straight to the source when friction occurs. Assume positive intent and exhibit trust.

- Genuinely recognize people 2x as frequently as you do today.

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