"Ten Steps of Engagement
For Managers and Leaders"
Leadership for Today and Tomorrow

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Before the session
Review the materials (slides, animations, notes, exercises, workbooks)
Understand the objectives – what is the training meant to address?
Practice the session at least once
Know your equipment – projector, laptop, remote mouse, webinar tool, and conference call system

Day of the session
Arrive early to set up room and/or web tool, test systems, etc.
Display presentation on screen before participants begin arriving

Starting the session
Start on time (or as close as possible)
Welcome participants to the workshop
Introduce self with name and title
Optional: conduct an icebreaker and/or introduction of participants
Address any housekeeping issues (such as participation expectations, questions, and phone etiquette if a webinar)

During the session
Manage your time and the participants during the session
Involve participants – ask for volunteers or call on people
If a webinar, use the system tools (annotation device, surveys, etc.)
Maintain a 'Parking Lot' for topics you aren't able to cover

Ending the session
End on time
Offer to stay longer to answer questions
Follow up with additional information and feedback quickly

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Agenda

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

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Key

Key points to be covered

Specific directions to facilitator

EXERCISE – activity for participants

>>> = click to animate or advance

Pre-workshop action: Customize the schedule to meet your needs. You can list the workshop times in the workbook or on a flip chart page.

Quickly cover the agenda emphasizing that due to discussions and exercises, the agenda is meant as a guideline only and the workshop may not adhere to the times listed.

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Key

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EXERCISE – activity for participants

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Introduce the Leadership Change Plan. Each participant should have a copy.

Describe the Leadership Change Plan as a document divided horizontally into the 5 topics we will be addressing in the workshop and vertically into three categories:
- *Own it*
- *Do it*
- *Measure it*

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Key

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EXERCISE – activity for participants
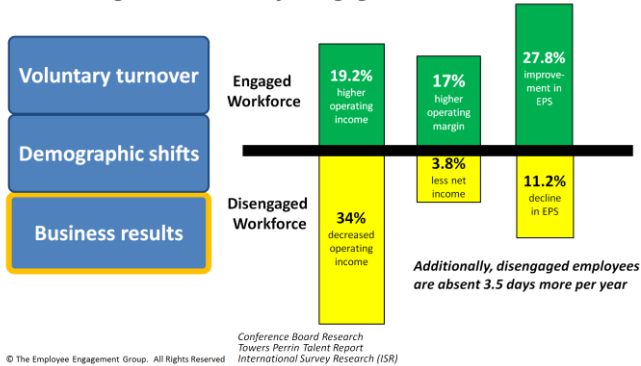
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Address the 10 steps briefly as a preview.

Remind participants that some steps are more involved than others and equal time will not be given to each

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STEP 1 – Link to High Performance

Making a business case for engagement – the 3 business drivers

Key

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EXERCISE – activity for participants

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Participants might be looking for some additional reinforcement at this point: businesses with:

>>>
- An engaged workforce show higher profits

>>>
- A disengaged workforce work with less operating income

>>>
- An engaged workforce show a higher operating margin

>>>
- A disengaged workforce with less net income

>>>
- An engaged workforce show a significantly higher earnings per share (EPS)

>>>
- A disengaged workforce shows a decline in their EPS

>>>
- Engagement also impacts absenteeism.

>>>

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*

Engaging Employees to Drive Results Action Plan
"Own It, Do It, Measure It"

Name:

Step 1 – Link To High Performance (Making the Business Case)

Step 2 – It Starts At The Top (Leaders Own It, Walk The Talk, Budget for Engagement)

Step 3 – Engage First Line Leaders (Train Your People Leaders, Establish Consistent Expectations)

Step 4. Communication – (Protocol, Venues, Technology, Branding, Transparency, Simple and Flawless Execution)

Step 5. Individualize Engagement (Generation, Culture, Diversity, Tenure)

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EXERCISE
Ask participants to bring out their leadership change plan. Note that there is already one entry made to this change plan.

Instruct them to think about:
- *How they will strengthen their mutual commitment with their employees*
- *Other actions they can do to link engagement to high performance (write on their change plan)*

Remind participants that they will be sharing these actions with their managers to develop an action plan for engagement.

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STEP 2 – It Starts at the Top

Team development

Mutual trust

Individual self esteem

Balanced

Accessible/visible

Problem solving

Common goals

Leadership

Conflict resolution

Focused

Interaction

Respected

Open communications

Nimble

Clarity of roles

Decisive

Decision-making power

Involvement

Top Team

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Tell participants that, based on prior research, these are the most common answers.

>>> to reveal answers

Briefly compare these answers to the answers from the brainstorm session.

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STEP 3 – Engage First Line Leaders

Train your leaders on engagement

How do you rank?

On the following chart, rank yourself in each category from 1 – 12:
- 1 = Highly Effective
- 12 = Needs most work

Use each number only once but use all numbers

Force Rank Yourself

Trust, Authority, Security, Direction, Vision, Structure, Clarity, Role Model, Reassurance, Cohesion, Inspiration, Recognition

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EXERCISE – Rank Yourself

Objective: Participants will identify areas out of the list where they have their strongest traits as well as areas that are their weakest

Tell participants to force rank themselves in the 11 areas:
1 = Highly effective
12 = Needs most work

Explain that they should use all numbers 1 – 12.

Give 1 – 2 minutes to complete then ask for volunteers to discuss their highs and lows. Discuss how they might make improvements.

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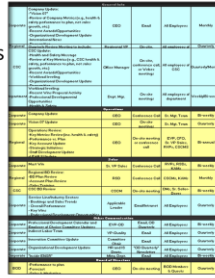
STEP 4 – Communication, the Cornerstone of Engagement

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")

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Introduce the Communication Protocol, or communication promise Cover the goals:

- Establish communication expectations – specifically identify and commit to what will be communicated, when, by who, and in what way
- Reinforce key elements of your strategic plan – the examples listed below this bullet are common strategic initiatives; your organization may choose to list others
- Create alignment with employees – alignment is a powerful engagement tool. When employees know what the company direction is, they are able to support and help meet the goals. Following a communication protocol establishes the consistent communication of goals and strategies resulting in alignment
- Reinforce communication – studies show that, with all the information that is available to employees, a message must be received 13 times in order for it to really resonate

>>>

Is this company prepared?

Address the statistics with emphasis on:

- *Ask, Are policies the answer to controlling social media? Do we want policies?*
- *Ask, Why do you think CIOs block social media? Discuss answers (most answers will revolve around social media being a drain on computer power and server space)*
- *Ask, What do you think employees are doing if their social media is blocked? Discuss answers (most will answer that employees are finding other alternatives)*

>>>

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

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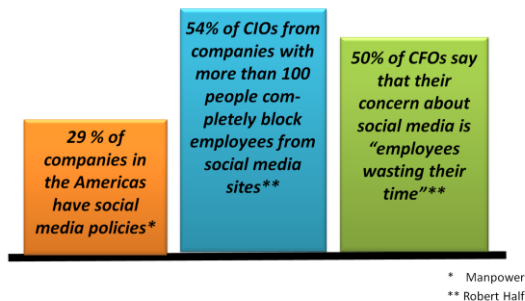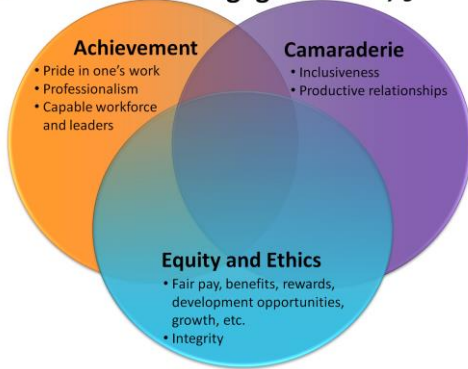
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Introduce the 3 individual areas that all generations have in common. Each appears on >>>. The bullets below have some explanation for each similarity:

Achievement – all generations seem to want to accomplish goals and be successful. They have pride in their work and a professional attitude
Camaraderie – employees what to be part of something successful and develop relationships that are strong and will last.
Equity and ethics – all generations are tuned to fair pay, benefits, rewards, etc. That's not to say that they all need the exact same, just that there's a fair method of distribution. This is why so many people are upset with CEOs receiving large bonuses or golden parachutes while employees are being laid off.

>>>

STEP 6 – Create a Motivational Culture

Know your employees

Achievement
• Satisfaction of successful project
• Want to exercise talents
• Self-motivated if job is challenging

Adapted from *The Manager's Desk Reference* - Cynthia Berryman-Fink and Charles B. Fink

Affiliation
• Interaction with others
• Social aspect of workplace

Autonomy
• Want freedom/ independence
• Like to work alone
• Take responsibility for own tasks/projects

Esteem
• Specific recognition and praise
• Public or private

Safety/Security
• Crave job security
• Steady income/benefits
• Hazard-free work

Authority
• Influencing people
• Sometimes controlling
• Lead and persuade

Equity
• Want to be treated fairly
• Compare selves to others

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Key points to be covered

Specific directions to facilitator

EXERCISE – activity for participants

>>> = click to animate or advance

There are 7 motivators that everyone is impacted by but at different levels. In other words, we have all these motivators, but some are primary, others secondary.

Notice that money is not one of the motivators – money can provide motivation but on a short term basis. These motivators are more intrinsic.

Definitions appear with each >>>.

Achievement - Employees with this need want the satisfaction of accomplishing projects successfully. They want to exercise their talents to attain success. They are self-motivated if the job is challenging enough, so provide them with the right work assignments and they will consistently produce.

Autonomy - These employees want freedom and independence. Allow them to make their own choices, set their own schedules, and work independently of others.

Safety/Security - Employees with this motivation crave job security, a steady income, health insurance, and a hazard-free work environment. These folks need predictable work with little risk or uncertainty. Salary and fringe benefits are also important to them.

Equity - These employees want to be treated fairly. They probably compare work hours, job duties, salary, and privileges to those of other employees. They will become discouraged if they perceive inequities.

Affiliation - This need is satisfied through affiliation with others. These employees enjoy people and find the social aspect of the workplace rewarding. Motivate them by giving them opportunities to interact with others: teamwork projects, group meetings, and so on.

Esteem - These employees need recognition and praise. This does not necessarily mean public praise. Give them ample feedback and recognition whenever possible.

Authority - These employees get satisfaction from influencing and sometimes even controlling others. They like to lead and persuade, and are motivated by positions of power and leadership. Give them the opportunity to make decisions and direct projects.
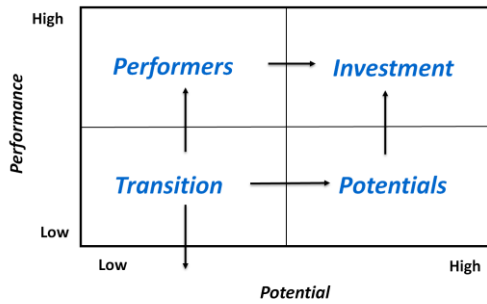
After covering the details, discuss any questions

Ask, Based on this information, what do you think motivates you? Discuss responses.

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Resource Matrix

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The Resource Matrix is a tool to help you to "know" your staff and their potential so training and development can be focused accordingly. When training time and dollars become precious - this is where it's going to be critical – where you're going to spend your resources.

Transitional Employee - indicates a definite transition employee who needs coaching, warning, developmental plan, question if they're in the right position – or counsel out – act upon, shouldn't reside here for long. Experts say 80% of time is spent with TE s - if you act upon, time is reduced. Be aware of managers who are TEs – they tend to hire with same or lesser skills than themselves.

Potentials – have potential but may need coaching on performance deficiencies. Are they capable, do they need expectations clarified, are they motivated? Coach and develop to bring performance issues up to par. Or, may perform well, but have they reached potential? If not, look for ways to grow and develop – build them.

Performer – also have some potential but tend to be just steady workers. It's important to identify these individuals as they may not have the desire to become investment employees. You want to keep them but put limited amount of time coaching them to higher potential

Investment employees - grow, develop, mentor - invest.

>>>

STEP 8 – Reinforce and Reward the Right Behavior

Ask Yourself:

Rewards/
Recognition

Available to everyone

Related to an outcome

Delivered consistently

Valued by employees

Key

Key points to be covered

Specific directions to facilitator

EXERCISE – activity for participants

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Here are some important considerations when doing rewards.

- Rewards and recognition must be available to everyone on your team. That doesn't mean they are given out equally but every team member has an opportunity to earn and receive them
- They are related to a specific outcome, not just for a "good job"
- They are delivered consistently. If one person receives a reward/recognition, someone accomplishing the same or equivalent task receives the same.
- The reward/recognition has value. That means that each employee might be treated differently. >>>

What kind of rewards/recognitions do you use? Discuss how answers support four considerations.

>>>

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

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Key

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EXERCISE – activity for participants

>>> = click to animate or advance

This further describes the difference between the job description and B.E.S.T. Profile.

Yesterday we dealt with job descriptions which were static and lifeless. They described what the person would need to have in order to be qualified for the job (experience, education, skills).

Today (and in the Future) we will focus on the B.E.S.T. Profile – what the employee has done in the past and will do for your company. It isn't just what can be written on paper that is important to success – it's also how one behaves and the traits one has that makes a high performance employee.

STEP 10 – Hire/Promote the Right Behaviors and Traits

The B.E.S.T Profile

Key

Key points to be covered

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EXERCISE – activity for participants

>>> = click to animate or advance

The BEST Profile is a tool that you can use to the key behaviors and traits (as well as education and skills) you need to fill the position.