

EMPLOYEE ENGAGEMENT TOOLKIT

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LONDON PHILADELPHIA NEW DELHI

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INTRODUCTION

Welcome to your employee engagement toolkit. This toolkit provides you with everything you need to design and then execute your employee engagement strategy and plan.

The contents of your toolkit will enable you to build employee engagement capability within your organization. The toolkit can be also used as a training resource to develop employee engagement skills and competencies.

The toolkit is primarily aimed at those individuals and teams who have some formal responsibility for employee engagement within your organization. This could include HR professionals, learning and development, internal communication and those individuals and teams with employee engagement in their job title.

ORGANIZATION OF THE TOOLKIT

The toolkit is made up of eight modules:

Module 1 – Defining employee engagement: what is it?

Module 2 – Setting your employee engagement objectives

Module 3 – Making the business case for employee engagement

Module 4 – Measuring employee engagement

Module 5 – How to develop employee engagement: putting your plan into action

Module 6 – Essential tools and techniques for employee engagement

Module 7 – Communicating for engagement

Module 8 – Planning and action

Each module can be used on its own or the modules may be used together to enable a full employee engagement strategy and plan to be designed.

THE MATERIALS

Each module contains a variety of different materials to enable you to develop your engagement strategy and plan.

Slides

Slides are included in a number of the modules to provide background and context for that particular module. Using slides often involves a 'show and tell' session with little participation except for some Q&A. When using the slides try to make the session more

interactive by asking questions and encouraging discussion with the group you are working with. Try to keep any show and tell sessions to a maximum of 30 minutes.

Activities

Each module contains a variety of different activities and exercises to either help you develop your engagement strategy or put your plan into action. There are detailed instructions contained within each module which explain:

- what the activity is;
- why you should use it;
- how to run the activity;
- how long the activity should last;
- who the activity is designed for or who you should use it with.

The activities are designed to provide you with everything you need to know to run them effectively.

Case studies

The toolkit also contains a number of case studies to demonstrate best practice employee engagement. The case studies have been carefully selected to provide the best examples of employee engagement in action. They will give you examples and ideas which you may be able to then use in your own organization. They also help to bring employee engagement to life, demonstrating it in action in a variety of different settings.

Handouts

Finally there are a number of handouts used within each module. Each handout comes with detailed instructions contained within the module to explain how to use it. There are a number of diagnostic tools within the toolkit, designed to give you insight into various aspects of your engagement approach and strategy. There are other handouts included to give you more information and detail in specific areas.

READY TO GO

You are now ready to start using your employee engagement toolkit to develop and improve employee engagement within your organization. We hope you enjoy using the tools and techniques detailed here.

ACTIVITY 4.2 *What survey approach is right for your organization?*

What this is: This activity is designed to help you consider which is the right survey to measure employee engagement within your organization.

Why use it: Different surveys measure different aspects of engagement, therefore it's important to analyse which survey approach and question set will best meet your organizational needs.

How to use it: To run this activity you'll just need the activity questions below, and a flip chart and pens to capture the outputs from your conversations.

Who to use it with: This activity is helpful to use with those people who have some responsibility for designing your engagement strategy and approach, for example your senior team, HR team and engagement team.

Background

- There are a variety of different employee engagement survey approaches, as detailed in the previous 'show and tell' activity (revisit the slides and notes from the previous activity if required).
- It is important for a company to select the right survey for them.
- This activity will enable you to consider what the right approach could be for your company.

Facilitator instructions

- This is a facilitated group discussion activity.
- Using the activity questions, ask the group you're working with to consider how they would answer them.
- Capture feedback on a flip chart, and at the end of the discussion agree any action points and next steps.

Activity questions

- Do you currently use a survey: yes or no?
- If the answer is yes:
 - Is it giving you what you need?
 - What currently works well with the survey you are using?
 - If not what is it you're missing?
 - What doesn't work so well with the survey you are using?

- Does this survey work with your definition of employee engagement?
- How do you ensure you get value from your survey?
- Are you seeing improvements in engagement?
- If the answer is no:
 - Do you believe you need to implement an engagement survey?
 - What is it you are trying to measure?
 - Do any of the models or approaches discussed appeal to you?
 - Which survey could work well with your definition of employee engagement?
 - How will you ensure you get value from your survey?
 - Could you design and run your survey in-house or do you need to bring in an external supplier?
- Further general questions:
 - What are the action points and next steps?

ACTIVITY 4.3 *Running your employee engagement survey*

What this is: This activity is aimed at those of you who are either looking to introduce an employee engagement survey into your organization, or wish to review the process and approach you currently use to ensure it is fit for purpose.

Why use it: This activity will enable you to ensure you are getting the most from your survey process.

How to use it: To run this activity you'll just need the activity questions below, and a flip chart and pens to capture the outputs from your conversations.

Who to use it with: You can use this activity alone to help you understand if you are getting the most out of your survey process or with a group who have some responsibility for designing your engagement strategy and approach, for example your senior team, HR team and engagement team.

Background

Use the questions and accompanying information below to help you get the most out of a survey initiative. Equally the questions are useful if you already run a survey, but want to ensure you are getting the most from it.

1. For what purpose?

Make sure you are clear about why you are running a survey and how this insight can be used to inform your overall engagement strategy and plan. What will you do with the results and how can you ensure the survey report won't just gather dust on a shelf somewhere? There are many approaches to running a survey; the all-employee annual survey is not the only way. For example, some companies survey a sample of employees at more regular intervals across the year to run shorter 'temperature' checks. Other organizations don't actually do a survey at all, choosing to go down a qualitative route instead and run regular focus groups to understand how their people are feeling and how engaged they are. For some companies it's all about the external benchmark, or getting on a 'best of' list. There is no single correct way to gather insight about engagement, just be sure that you explore all of the options.

2. Begin with the end in mind (in the words of Stephen Covey, 1989)

Be clear about what a successful employee engagement survey project looks like and what insights will be useful. For example some companies want to understand the drivers of engagement from their survey process, while others simply want to view aggregated data from each question. Think about how you want to splice and dice the data; the design of your research needs to be built in up front to enable different segments of data to be viewed. If you are choosing to work with an external survey provider work out what success looks like and be really clear about what is important to ensure the smooth running of any employee engagement survey project.

3. What are your priorities?

Considering your priorities for the survey process is useful to help you decide whether or not you wish to use an external supplier or run the survey yourself. Using an external supplier has many benefits, for example use of the latest technology, ease of reporting, confidentiality of responses, ability to benchmark and access to the latest best-practice research and approaches. However, it's useful to revisit your objectives for running the survey to understand how important these aspects are to you. If you simply wish to get an understanding of how employees are feeling at a particular moment in time you might wish to use a tool such as Survey Monkey or Question Pro to run the survey yourself. However, be mindful that there is considerable technical skill involved in writing good questions and designing research, so ensure that a qualified member of your HR team, or other, is involved with this process.

4. Consider the ideal employee experience

When conducting a survey you are asking employees to take the time to complete the survey, so it's a good idea to think about how you can make this a positive experience for them. To avoid survey fatigue, the survey experience for employees needs to be positive. From the way the survey is positioned, to how participation is encouraged, through to the way in which results are communicated back to employees and the role they will have in action planning: these elements should all be considered to help make the survey experience a good one for your people.

5. What role do you want your managers to play in the survey process?

Getting the support of your managers is an important aspect of the overall survey process, therefore you need to consider how you involve them in the process. You need your managers on board with the engagement survey, to champion it and encourage their teams to participate. Therefore communication with managers throughout the survey process is important. Consider what support you require from your managers and what they will need from you in order to fulfill their role effectively. How will you support managers in making sense of their results and discussing them with their teams?

6. Useful questions to consider if selecting an external employee engagement survey provider:

- Does their definition and model of employee engagement work with your definition and model?
- Do their key driver questions align with your company strategy and focus?
- Is there an opportunity for their survey design to be bespoke for your organization or is it an off-the-shelf solution?
- Will their survey design include open response questions to collect employee comments?
- How has their tool been validated and tested?
- Does their tool allow for any external benchmarking?
- Are they able to offer translation services if required?
- Can they offer multi-format surveys if required, eg online and paper?
- Can they provide different cuts of the data as required, eg by department, team, manager etc?
- What reporting tools do they offer and how easy are they to use?
- What type of statistical analysis do they offer?
- Have they got any recommendations from other clients?
- What action planning support do they offer?
- What is the cost? Be sure to enquire about any extras such as requesting further data cuts, or special reports.

ACTIVITY 4.4 *Developing your own employee engagement survey*

What this is: This activity is has been designed to give you some guidance on how to develop your own survey if that is your preferred approach, and common pitfalls to avoid.

Why use it: This activity will help you to design your own survey and associate question sets.

How to use it: To run this activity you'll just need the activity questions below to develop your draft survey. This process works well if you develop a draft set of questions initially, then share them with a group of relevant stakeholders rather than trying to develop the questions in a group setting.

Who to use it with: You can use this activity alone to help you develop your draft survey questions, then share the draft survey with a group of relevant stakeholders for review and agreement.

Background

Typically it is when considering the potential drivers of engagement that the survey grows into a beast! There are usually only a small number of questions used to actually measure employee engagement itself. However, often when discussing which parts of the employee experience you want to measure to understand drivers of engagement, the numbers of questions asked can grow significantly.

There is an opportunity here to go back to the purpose of the survey: what is it you're trying to measure and why? Do you simply want to understand how engaged your people are, or is it important to look at what is driving engagement as well?

When looking at which questions to include to understand drivers of engagement it is useful to consider the engagement survey within the context of the wider business strategy. For example for a retail company with brand and customers at the heart of its strategy, questions relating to these areas are important to include, but for a manufacturing company questions around quality and governance might be important.

There are some key themes which the majority of surveys will include. The Society for Human Resource Management (SHRM) Foundation in the United States identified a number of common themes used by survey providers to measure employee engagement. They include:

- pride in employer;
- satisfaction with employer;
- job satisfaction;

- opportunity to perform well at challenging work;
- recognition and positive feedback;
- personal support from line manager;
- effort above and beyond the minimum;
- understanding the link between one's job and the organization's mission;
- prospects for future growth with one's employer;
- intention to stay with one's employer.

Different survey providers will also include different items (questions) to analyse the key drivers of engagement: that is, what elements of an employee's work experience can be linked to those questions used to measure actual engagement.

Typically these types of questions include areas such as:

- work-life balance;
- diversity;
- pay and conditions;
- communications;
- leadership;
- managers;
- environment;
- training and development;
- reward;
- recognition;
- colleagues;
- career opportunities;
- job;
- brand;
- company reputation;
- customers;
- performance management;
- policies and procedures;
- goals and objectives;
- operating efficiency;
- health and safety;
- quality;
- and more...

Activity guide

- 1 Consider which questions you will use to actually measure engagement itself. This should link to your definition, for example, if we define engagement as 'our organization is a great place to work' then clearly we need to ask a question such as 'I would describe this organization as a great place to work'.

Typical engagement measurement questions include:

- I would recommend this company to my friends as a good place to work.
 - I intend to be working here in 12 months' time.
 - I am proud to work here.
 - I strongly believe in our goals.
 - I have great friends at work.
 - My work gives me a personal sense of accomplishment.
- 2 Now consider the 'driver' questions you wish to include; take a look at the list above to help you design these questions. Examples could include:
 - I get training and development to help me do my job.
 - My line manager treats me with respect.
 - Senior management are visible.
 - This company cares about its customers.
 - I am able to make the decisions I need to do my job effectively.
 - 3 Question design: using a five-point 'Likert scale' which allows respondents to reply to question statements in the following way;

Q. I am proud to work for this organization:

Strongly agree agree disagree strongly disagree no view
 - 4 Now consider what demographic questions you would like to include. For example you may wish to be able to arrange the data according to employees' level in the organization, or team they belong to. Think about the purpose of asking the various demographic questions and try to include them if you intend to actually use the data this gives you.
 - 5 Finally, consider what open response questions you'd like to include. Open response questions take longer to analyse given you will need to read through all of the responses and analyse the themes emerging. Remember that open response questions take longer to complete so will add minutes to the survey completion times.

Other points to consider

The number of questions and the survey completion time

- It can be tempting to try to shoe horn everything you have ever wanted to ask your employees about within the survey making it over-long and unwieldy. Try to stick to the core purpose of your survey and challenge yourself to keep questions used to a minimum. Generally the longer the survey takes to complete the less likely people are to fill it out or at least make it to the end.

Online or offline?

- There are a number of online survey providers which now exist, such as Survey Monkey, which make the survey process and subsequent data analysis simpler.
- Generally you have to pay a fee for these services if you go over a certain number of respondents; however, the fees tend to be very reasonable.
- Some online survey suppliers provide 'add-on' services to allow you to conduct more sophisticated data analysis.
- Of course if you have employees who are not online you'll need to consider providing a hard-copy version of your survey. Remember that you need to build in time to manually enter responses from any hard-copy surveys you receive.

Don't get obsessed with response rates

- Many companies still seem to be obsessed with improving their response rates to the annual survey, to such an extent that this can often be seen as a key component of their engagement strategy: to improve survey response rates by x%.
- Common sense would say that higher response rates are better; the more people filling out the survey the more engaged they must be. But this of course is not true.
- When you look at best-practice social science research, what we actually need is a representative sample of employees to ensure that the findings we observe can be generalized to the wider population.
- Therefore as long as we sample in the correct way, and the sample is large enough, this is enough to give us what we need.
- The question of sample size has long been debated within social science, but there are some helpful sample size calculators you can find on the internet which take account of:
 - your total population size, ie number of employees;
 - the margin of error you're willing to tolerate, usually between 3 per cent and 6 per cent.

- They then provide a calculation for how many responses you need to have either 90, 95 or 99 per cent confidence level. To illustrate:
 - Population size: 10,000 employees.
 - Margin of error: 3 per cent.
 - Sample size:
 - 90 per cent confidence = 703 responses;
 - 95 per cent confidence = 965 responses;
 - 99 per cent confidence = 1,556 responses.

You'll see for this example you're looking at a 10–15 per cent sample size for the results to have a low margin of error and high confidence level... this is nowhere near the 80 per cent-plus response rates companies go after.

The same tools also provide a calculator to work out how many surveys you'll need to send out to generate the required response rate.

To illustrate:

- if we are going for 95 per cent confidence we need 965 responses back;
- our predicted response rate is 35 per cent;
- therefore we will need to send out 2,754 surveys to ensure we reach the necessary response rate.

Finally the tool then calculates the accuracy of your response rates.

To illustrate:

- population size is 10,000;
- we actually had back 2,460 completed responses from the 2,754 surveys we sent out;
- which gives us:
 - an error level of 1.4 per cent at 90 per cent confidence;
 - an error level of 1.7 per cent at 95 per cent confidence;
 - an error level of 2.3 per cent at 99 per cent confidence.
- You can see from the example above that with a population of 10,000 employees, an approximate response rate of 25 per cent comes with a very low error rate and a high confidence level.
- Finally before we move on a quick word on sampling. In order to be able to generalize any findings to the wider population we need to ensure we take what is known as a probability sample.
- A probability sample means that everyone within the population, ie employee base, has an equal chance of being included in the sample.

- The easiest way to achieve this is to send the survey to everyone.
- Or you can select a sample of employees to send the survey to, as detailed by the worked example above; you just need to ensure you use probability sampling methodologies so that you can generalize the results once they are in.

Mind your language

- One of the challenges of using a survey is that of the semantics and language involved.
- For example often surveys will ask questions about senior leadership: depending on where employees sit in the hierarchy this will mean different things to different people.
- Establishing questions with as little ambiguity as possible is a real challenge.
- Often this ambiguity and differences in interpretation become clear in the survey follow-on process.
- For example when running focus groups to delve deeper into issues raised within the survey it becomes clear that employees have interpreted certain questions in very different ways.

Obsession with benchmarking

- In addition to obsessing about response rates, senior leaders are also often obsessed with external benchmarking: making the Sunday Times Best Companies list, or the top companies in the Great Place to Work list.
- Whilst this motivation does provide a burning platform to enable a focus of resources on engagement, very often making the list eclipses the purpose of engagement itself, to improve the business and create a competitive advantage.
- The objectives and plan are at risk of being short term when the focus is to benchmark.

And finally:

- When you have drafted your survey questions, share them with relevant stakeholders to help craft and draft your engagement survey.
- When you have a set of agreed questions use the information below to ensure you don't fall into any of the common pitfalls associated with employee engagement surveys.

EXAMPLE SURVEY

You can use the example surveys below to help you craft and draft your own survey.

Example demographic questions:

- 1 Please select the job/role/description that most closely relates to you
- 2 Please select your functional group
- 3 How long have you worked for XXX?
 - Less than 1 year
 - 1–3 years
 - 3–5 years
 - 5–8 years
 - More than 8 years
- 4 Gender
 - Female
 - Male
- 5 Age
 - Less than 20 years old
 - 21–29 years old
 - 30–39 years old
 - 40–49 years old
 - 50–59 years old
 - Over 60 years old

Likert scale questions: 5-point scale, strongly agree – strongly disagree:

I strongly believe in the goals and what we do here.

I am proud to work here.

I would recommend this as a good place to work.

I think XXX is doing a good job of recruiting the right people for its future needs.

XXX values teamwork.

Where I work, effective measures are taken to ensure my health and safety.

XXX is considerate of my life outside of work.

My benefits are fair (medical, pension, holidays).

My pay is fair.

Management let me know clearly what is expected of me.

Management are good at establishing priorities for us to focus on.

Management do a good job of communicating.

My line manager communicates well.

My line manager treats me with respect.

My line manager gives me recognition for a job well done.

I have regular conversations with my line manager about my performance.

I understand how my performance is evaluated.

My line manager helps us to work as a team.

I have a clear understanding of the goals of my team.

I can challenge our traditional ways of doing things.

I believe that my department does a good job of developing its people to their full potential.

There are sufficient opportunities for me to receive training to improve my skills in my current job.

I have the right tools and resources to do my job properly.

I am able to make the decisions I need to do my job effectively.

Where I work, there is little wasted time and effort.

Where I work, decisions get made without undue delay.

Where I work I am clear about who is responsible for what.

Where I work we regularly discuss how we do things.

Where I work, we are good at sharing best practices and knowledge with other teams.

Where I work, people are held accountable for delivering what they have promised.

My work gives me a sense of personal accomplishment.

I have good friends at work who provide me with support.

The people I work with cooperate to get the job done.

We work together effectively across departments to meet customer needs.

Open response questions:

If there is one thing you could do to improve your experience of working here what would it be?

What is your advice to senior management?

Do you have any other comments?