

*Class 4:*

What management needs to know about best practices and business models of engagement solutions.

# Employee Engagement Tactics

# A Strategic Plan Linked to Clear Dashboards

*Employee Engagement improves efficiency by aligning tactics used to engage people toward a common purpose.*

## Monetary Results Can Be Achieved

# Under 20%

Of organizations have a strategic human capital plan with clear scorecards and ROI of engagement measurement practices.



**A Strategic  
Approach to People  
Requires  
Management and  
Performance  
Dashboards and ROI  
of Engagement  
Measurement, and  
Alignment of  
Engagement Tactics.**

- Human capital value add
- Human capital ROI
- Revenues, profits per employee, customer, channel partner, etc.
- Diversity, equity and inclusion success
- Training and development efficiency
- The ROI of expenses related to:
  - Sales and marketing
  - Incentives, recognition, and loyalty
  - Training and benefits
  - Communications

## The Engagement Toolkit

*The goal is to align and integrate all the tactics currently used to engage people, preferably on a seamless technology platform to reduce siloes and confusion.*

- Strategic process design
  - Brand and culture definition and alignment
  - Human capital dashboards tied to performance
  - Assessment and feedback
  - Recruitment and onboarding
  - Collaboration and innovation
  - Diversity and inclusion
- Job design
  - Communications in every media
  - Learning
  - Loyalty
  - Rewards and recognition and brand media
  - Technology
  - Human Capital; internal, external reporting.

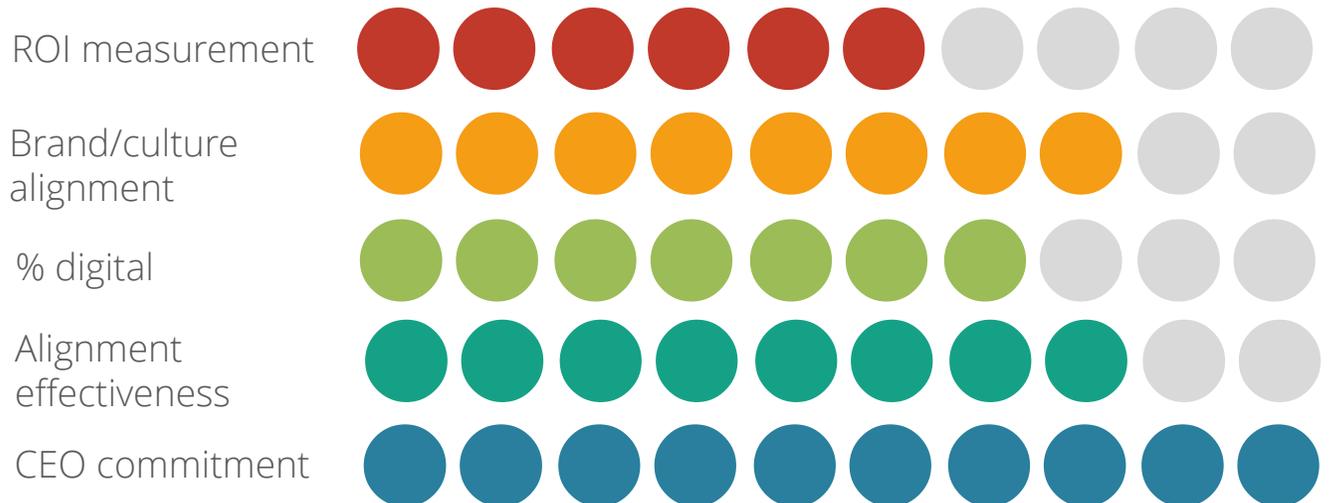
# Strategic Design Begins With Gap Analysis

*Identify the key levers of engagement needed to achieve your goals and their current state of effectiveness in terms of ROI measurement, alignment with brand and goals, degree of digitalization, and CEO commitment.*



## Tactical Gap Analysis for Each Tactic

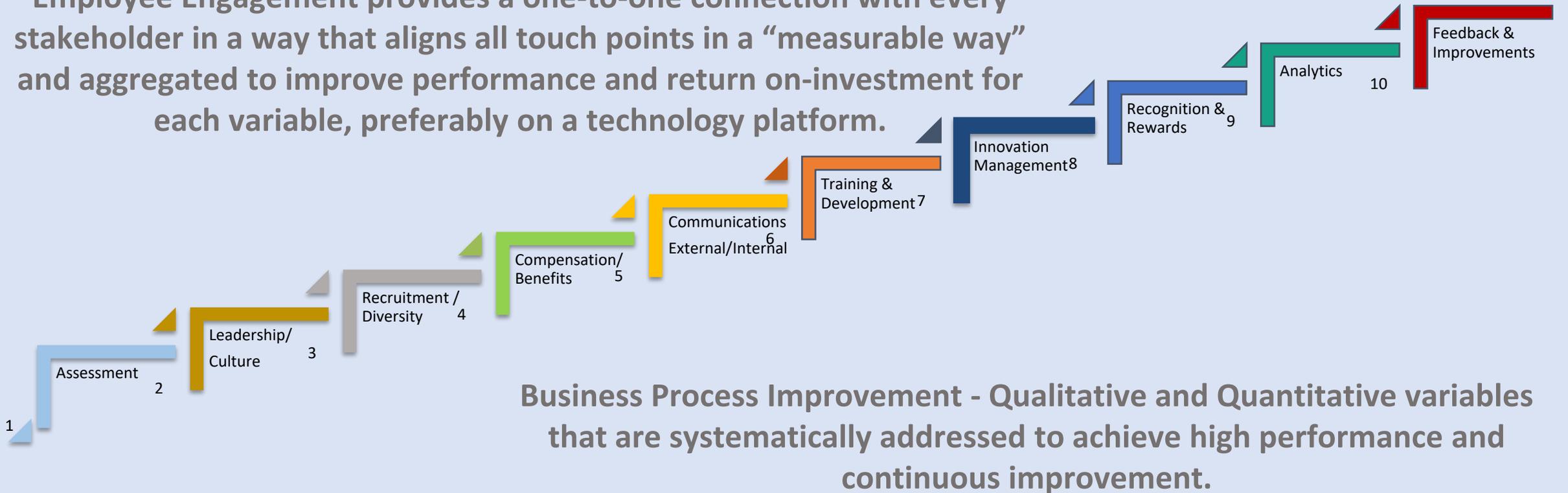
The opportunity is to analyze each human capital initiative based on its relevance to the organizational goals; how it's measured, how well it's integrated with other engagement efforts, and level of CEO support.



*Once we understand the playing field, we align and streamline current activities against clear quantitative and qualitative benchmarks.*

# An Iterative, Sequential “Step by Step” Design Process

Employee Engagement provides a one-to-one connection with every stakeholder in a way that aligns all touch points in a “measurable way” and aggregated to improve performance and return on-investment for each variable, preferably on a technology platform.





## Brand and Culture Alignment and Definition

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- Every company needs a clear purpose to align the interests of all stakeholders toward common goals.
- Brand and culture definition and alignment ensures that the purpose is aligned with the brand and culture and addresses all stakeholders—shareholders, customers, employees, etc.
- The process requires a strategic approach that enables all stakeholders to visualize what the company and all its stakeholders look like on “it’s best day.”
- Establishment of a management dashboard for human capital management relevant to the business and a focus on ROI measurement of engagement investments.

# Engagement Technology

- Identify the key levers of engagement critical to your business and their current state of seamless digitalization, integration, and alignment.
- Assess how the various technologies already used can be integrated for seamless access on smart phones.
- If there is little integration of digital platforms for engagement, consider implementing an EPT (Enterprise Portal Technology) to connect all engagement efforts across the enterprise.

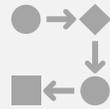
**Business model:** advisory and implementation fees; monthly per-seat SaaS or other service fees.

**ROI:** Higher human capital ROI and value add; higher revenues, profits per customers and employees; greater willingness to recommend.

# Assessment and Feedback



The process of monitoring the level of engagement and willingness to recommend of key stakeholders and their understanding of brand values.



Process must be quick and easy, comparable, and include a plan to take immediate action on findings.



Ideally, assessment can detect red or yellow zones of dissatisfaction related to a business unit or group leader.



**Business models:** Advisory and reporting fees; per seat charges.

**ROI:** Increased productivity, quality, and retention.

# Recruitment, Pay, and Onboarding

- Identification of a clear talent brand aligned with the overall brand.
- A process to identify not only aptitude but also emotional suitability to the job and culture.
- A plan for thinking out of the box and building a diverse pool of talent.
- A compensation strategy that attracts talent and ensures employees generally are not distracted by survival or health concerns or tempted by other opportunities.

**Business models:** Advisory fees for talent branding; percentage of salaries.

**ROI:** Higher employee retention; greater willingness to recommend.

# Diversity and Inclusion

- Increase performance by tapping talent in the widest possible communities.
- A process to find and address the needs of customers, channel partners, and employees of all gender, ages, ethnicity, sexual orientation as a source of talent and wealth, not compliance.
- An ongoing platform for promoting community around the common purpose of the organization.
- An internal development and training process designed to address the needs of diverse communities from a technical and social standpoint.

**Business models:** Internal management or advisory fees.

**ROI:** Higher revenues, profits per employee; higher engagement scores; greater Human Capital ROI and Value Add.

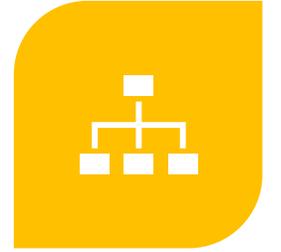
# Job Design



IDENTIFYING THE BEST WAY TO ASSIGN TASKS TO MAXIMIZE ENGAGEMENT AND JOB-SHARING.



LOOKING AT WAYS TO BREAK UP MENIAL TASKS THROUGHOUT THE DAY TO REDUCE DISENGAGEMENT CAUSED BY LONG PERIODS OF REPETITION.



ORGANIZING TASKS SO THAT PEOPLE CAN SHARE THEM, REDUCING THE IMPACT OF UNEXPECTED ABSENCES OR RESIGNATIONS.



STRATEGICALLY MAPPING HOW PEOPLE OF DIFFERENT SKILLS AND APTITUDES CAN ADVANCE TO HIGHER LEVELS OR BROADEN THE TASKS THEY CAN TAKE ON.



**BUSINESS MODEL:** ADVISORY FEES



**ROI:** ENHANCED PRODUCTIVITY, QUALITY, REDUCED TURNOVER.

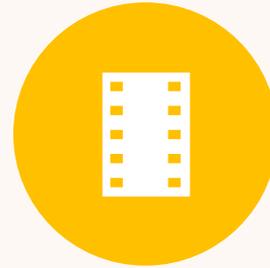
# Communications



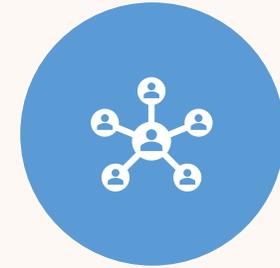
IDENTIFYING THE STORY AND MESSAGING TO ALIGN THE OVERALL COMMUNICATIONS THROUGHOUT THE YEAR.



DETERMINING THE BEST COMBINATION OF MEDIA TO TELL THE STORY, STARTING WITH AN EMPLOYEE ENGAGEMENT SOFTWARE PLATFORM.



BREAKING THE STORY INTO SNIPPETS IN THE APPROPRIATE MEDIA, PRINT, POSTER, DIGITAL, DECK, VIDEO.



INTEGRATING SOCIAL FOR TWO-WAY AND CROSS-ORGANIZATIONAL COMMUNICATION AND SHARING.



# Learning

- Determine the type of skills needed to maximize productivity, quality, and engagement.
- Equally focus on the social or emotional skills, if any, required for the job, and what is needed to optimize collaboration.
- Identify specialized training to address diversity objectives, including disability accommodation.
- Make sure people understand the “why” of training.
- Provide rapid feedback and gamify to the extent possible.
- Utilize micro-learning based digital platforms and gamification whenever possible for skills and reminders and in-person or virtual for collaboration, innovation, and diversity development.
- **Business models:** Advisory fees; per-seat charges for software.
- **ROI:** Higher Human Capital ROI and Added Value, quality, productivity, retention.

# Collaboration and Innovation

Leverage your digital platform and private social network to promote sharing of information and ideas.

Create online platforms for people to develop ideas or manage initiatives.

Make it easy for people to make suggestions with the assurance they will be reviewed, implemented if feasible, with feedback provided if not, and, if adopted recognized, communicated and rewarded in a way commensurate to its value to the organization.

**Business model:** Advisory service fees; software fees unless integrated with an Engagement Portal Technology.

**ROI:** Marketing ideas; increased productivity and quality, better stakeholder experiences and engagement.

# Incentive programs

- Have very clear qualitative, quantitative objectives and measures.
- Promote goals and actions required to achieve them.
- Focus on the middle-60% with an open-ended approach that let's every feel rewarded for performance improvement.
- Carefully align with communications, learning, assessment, to promote the right behaviors and celebrate success.
- Select non-monetary rewards and brands with high perceived value that distinguish achievement from compensation and that involve significant others and foster long-lasting relationships.

**Business model:** Program design fees; project management; engagement platform; pay for performance and rewards.

**ROI:** Achievement of the desired goals at the ROI built into the process.



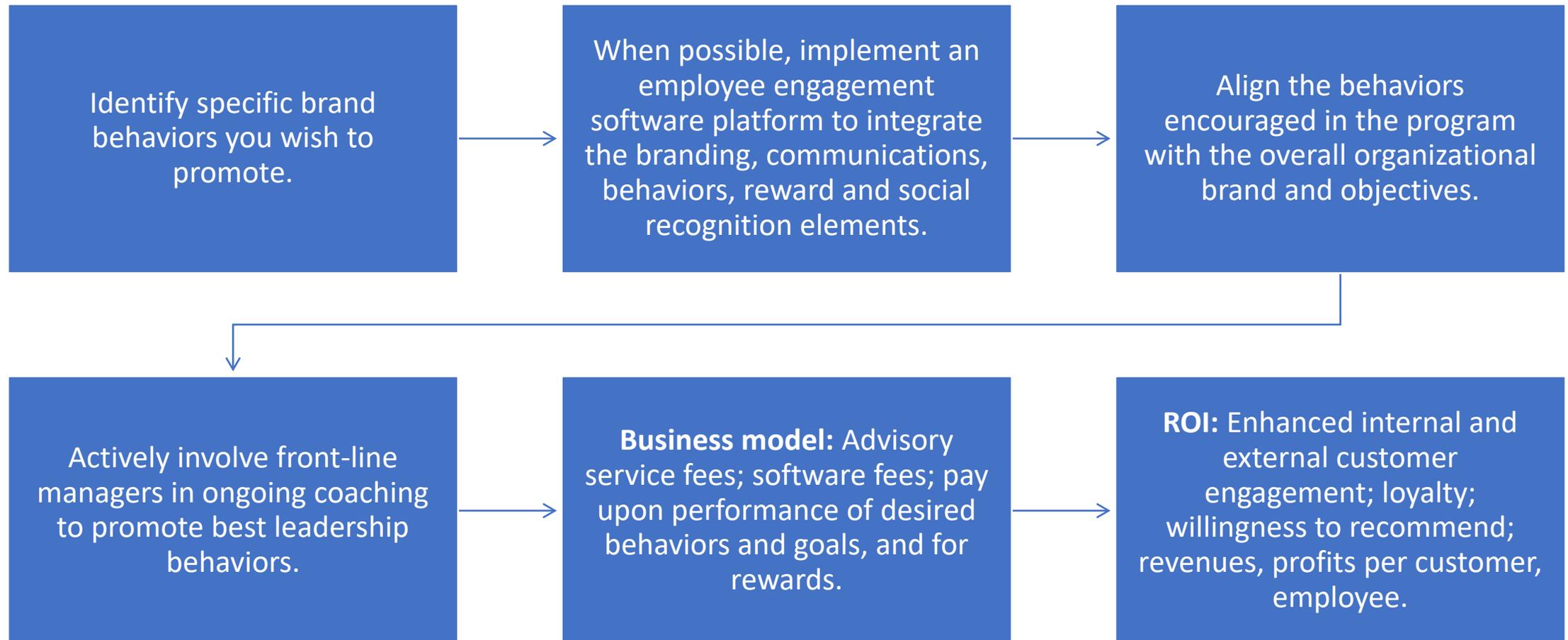
# Loyalty—Programs to Encourage Repeat Business

- Connect the dots between all the features that contribute to loyalty—the product or service, the customer experience, the emotional connection, as well as transactional benefits.
- Tie rewards and benefits to plateaus people can easily understand and track.
- Select gifts and benefits personalized to the individual to the extent possible to make it sincere.
- Tie it to your social and other communications and internal communications platforms to continually reinforce its value.
- Use its redemption and other communications platform to reinforce organizational commitments.

**Business model:** Advisory service and project management fees; software fees; and for rewards.

**ROI:** Enhanced internal and external customer engagement; loyalty; willingness to recommend; revenues, profits per customer, employee.

# Recognition



# Rewards and Brand Media

Carefully selected gifts and rewards in terms of **brands and their stories**, products or services, customization and personalization of the reward experience.

Offered as part of recognition, incentive, or gifting program to express personal appreciation in a way that tells a story about your organization.

Carefully distinguished from compensation or pricing arrangements.

Implement a model for surprise and delight specifically to reinforce values.

**Business model:** Advisory service fees; software fees; pay upon performance of desired behaviors and goals, and for rewards.

**ROI:** Greater willingness to recommend or share the experience with others; a contributor to higher revenues per customer/employee.

# Analytics for Human Capital Internal and External Reporting

- Developing a human capital management and measurement strategy aligned with organizational purpose and goals.
- Identifying which information to share with whom and a means of rapidly implementing findings.
- Integrating actual data from permission-based Enterprise Engagement platforms to combine qualitative and quantitative information.
- Using data specialists who can provide provide prescriptive insights to address opportunities and challenges.
- Creating a public human capital disclosure strategy.

**Business model:** Advisory service fees; software fees.

**ROI:** Higher Human Capital ROI and Value Add; revenues, profits, and willingness to recommend of employees, customers; greater investor engagement.

# Potential Exam Questions



What is essential to improving the efficiency of traditional engagement tactics; culture, communications, learning, diversity?



What is a common source of inefficiency in the use of engagement tactics?



Name a specific way to improve the efficiency of any engagement tactic.



Who can technology help improve the use of almost any engagement tactic?