Engagement Ambassador Summit

2023 Action Planning

Paul Axelrod & Monica Shirley

June 1, 2023
The Game Changes…

Survey Participation: A Finite Game

Taking the survey is: yes/no, outcome oriented, and easily measured.

The game has one right answer – taking the survey.

Action Planning: An Infinite Game

Taking action to collectively improve the team experience is not binary, is process oriented, requires many viewpoints and datapoints.

This game has uncountable right answers.
The Game Changes…

**Known Takeaways**

- Recommended next steps
- Access to resources

**To Be Determined**

- Organizational deadlines for sharing results, uploading action plans and completing tactics
- Deadlines will be posted on Managers Engagement page
VUCA
VOLATILITY, UNCERTAINTY, COMPLEXITY, AMBIGUITY

VOLATILITY
UNCERTAINTY
COMPLEXITY
AMBIGUITY
### SURVEY: Descriptive Not Prescriptive

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

Copyright © 1993-1998, 2022 Gallup, Inc. All rights reserved. The Gallup Q12 items and Gallup proprietary information are protected by law. You may not administer a survey with the Q12 items or reproduce them without written consent from Gallup, Inc.
Action Planning Overview
Engagement Action Planning

- Engagement action planning sessions are used to drive positive change.

- Process focuses on asking teams to reflect on and discuss the strengths and opportunities of their team.

- Following the discussion, the team commits to specific actions that will improve employee engagement, and – by extension – increase the team’s ability to fulfill its mission.
Simple Approach to Action Planning for Teams

**STEP:**

1. **DETERMINE ONE ISSUE OF TEAM NEED**
   - The team picks one mission-critical issue that's keeping them from meeting their goals.

2. **DETERMINE MOST RELEVANT ENGAGEMENT ISSUE**
   - Team filters their issue through the most relevant items in the engagement survey.

3. **ALIGN ON AN ACTION PLAN**
   - What is the first action that the Team will execute to improve engagement?
Year Round Cycle
Survey is annual; action planning is continuous

1. Engagement Survey
2. Share Survey Results
3. Evaluation Action Plan
4. Set Action Plan
5. Evaluate Action Plan
6. Set Action Plan
7. Evaluate Action Plan
8. Set Action Plan
9. Evaluate Action Plan
Sharing Survey Results: Logistics Consideration

Managers and Ambassadors can partner to determine:

- When the manager will share team results with the team
- When the manager will distribute survey results to team and in what format: Hard and/or soft copies
- Which meeting format the team will use: Virtual or in person
- If the team needs one meeting or multiple to cover shifts
Action Planning Logistics Considerations

Managers and Ambassadors partner to set expectations for action planning:

- When the team will meet - Recommend at least 1 week between results sharing and action planning session
- Which meeting format the team will use: Virtual or in person
- If the team needs one meeting or multiple to cover shifts
- How will you ensure the ability of everyone to participate
Action Planning Resources
Engagement Action Planning Resources

- **2023 Action Planning Guide**
- **Gallup Access**
- **Engagement Resources page**
- **Engagement Action Labs**
- **Request delegate access**
Sample Areas of Focus for Each Q12 Item*

<table>
<thead>
<tr>
<th>Q12 Item</th>
<th>Sample Focus Areas</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Q1: Expectations</strong></td>
<td>Hold one-on-one meetings with manager to set performance expectations in terms of tasks, purposes and performance goals.</td>
</tr>
<tr>
<td><strong>Q2: Materials and equipment</strong></td>
<td>Identify the equipment, systems, and information that team members need to feel successful and perform at their best. Establish a process to follow up regularly with managers to inform managers of resource needs.</td>
</tr>
<tr>
<td><strong>Q3: Opportunity to do best</strong></td>
<td>Organize projects, tasks and activities around each team member’s talents and strengths, instead of assigning the work based on the job description and who has time.</td>
</tr>
<tr>
<td><strong>Q4: Recognition</strong></td>
<td>Individualize recognition to each team member by how they like to be recognized.</td>
</tr>
<tr>
<td><strong>Q5: Cares about me</strong></td>
<td>Let team members closest to a situation decide what to do and how to do it whenever possible.</td>
</tr>
<tr>
<td><strong>Q6: Development</strong></td>
<td>Make help available for team members to schedule one thing that they want to learn more about to be more effective in their role.</td>
</tr>
<tr>
<td><strong>Q7: Opinions count</strong></td>
<td>Establish a forum and process for team members to share their perspective, ideas, input and opinions.</td>
</tr>
<tr>
<td><strong>Q8: Mission &amp; Purpose</strong></td>
<td>Team members share times when their work has represented the organization's mission or purpose so that others can learn from their work.</td>
</tr>
<tr>
<td><strong>Q9: Committed to quality</strong></td>
<td>Share quality information at weekly team meetings. Hold quarterly quality review meetings.</td>
</tr>
<tr>
<td><strong>Q10: Best friend</strong></td>
<td>Create situations where people get a chance to get to know one another.</td>
</tr>
<tr>
<td><strong>Q11: Progress</strong></td>
<td>Establish a forum and process for peer feedback and recognition.</td>
</tr>
<tr>
<td><strong>Q12: Learn and Grow</strong></td>
<td>Team members share with the team what they are currently learning and what they want to learn next.</td>
</tr>
</tbody>
</table>

* Belonging Index items in blue
### A Sample Plan (Refer to the “Simple Approach” slide)

<table>
<thead>
<tr>
<th>One Issue of Team Need</th>
<th>Most Relevant Engagement Item</th>
<th>Align on an Action Plan</th>
<th>What are the steps needed? Who will do it? When will they do it by?</th>
<th>Dates of 5-minute Team Check-Ins*</th>
</tr>
</thead>
</table>
| Working in silos makes it hard to     | Q9: Commitment to Quality              | To improve Q9, team will share quality information at weekly dept. meetings. Also hold    | • Monica creates survey data folder MS Teams by [date]  
• Paul requests data from team leads every Monday, starting on [date].  
• Marcia presents data at weekly dept. meetings, starting on [date]  
• Nancy will facilitate quarterly discussion of quality trends, starting on [date]. | Date 1; Date 2; Date 3; Date 4; Date 5 |
| coordinate and learn from each other  |                                        | quarterly quality review meetings.                                                       |                                                                                                                                  |                                  |

At each check-in, discuss:
What did we do? Did it make any difference? What is our next step?
Year Round Cycle
Survey is annual; action planning is continuous
Next Steps

- Partner with manager to set a date for Survey Results Sharing with team
- Register for June 29 Town Hall
- Partner with managers to prep for Action Planning Session
- Managers can register for Engagement Action Labs thru September
- Next Ambassador Summit August 23 – invite coming soon
- Ask us your questions