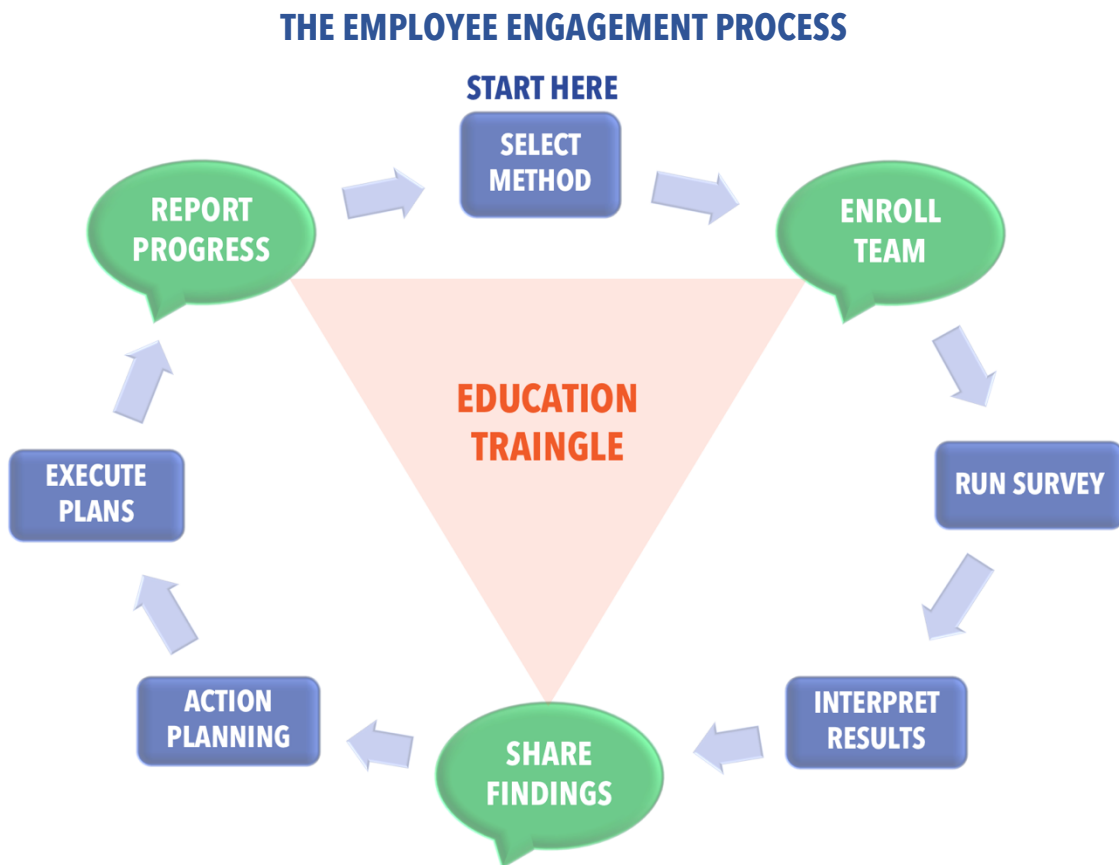


HOW TO MEASURE ENGAGEMENT

Running an employee engagement process is far more than administering a survey. The survey is only a small part of an overall sequence of events. The figure below depicts all the elements in the cycle.



Each one of these elements is designed to drive the scores higher, not simply measure them. This should be a repeated process, at minimum once a year.

Some organizations will choose to do pulse survey's throughout the year more frequently. Whatever frequency you choose, this is the path to follow. I will highlight some best practices and resources for a few of the elements next

1. SELECT A METHOD

The method you select depends a bit on your budget, commitment level, and organizational size. Here are three categories from the least expensive and least sophisticated to the most.

Small Teams (4 or less)

In the case of a small team of 5 or less getting information is easy in one sense, and much more difficult in another. A team that size is too small to run an anonymous survey so the best way to get information is running one on one interviews.

This allows you to go deeply into the qualitative nuances of how your team is doing. The challenge is it takes time and effort to build the kind of trust required to get truly honest feedback. Even in the best of circumstances people tend to hide how they are feeling from their supervisor.

I highly recommend a structured conversation. I detail my recommended approach in **Module 4, Video 14: The Zipper Conversation**

Medium Size Teams (Between 5 and 300)

Once you get up to at least 5 people you can start administering surveys. This is really helpful because you're likely to get much more honest feedback. You can do a google survey or surveymonkey.com if you want, but I recommend one of the two tools below instead.

The main reason is measuring employee engagement requires specific kinds of questions and it most useful when you can benchmark your own performance against the industry or workplace in general.

An external benchmark helps you interpret the results and prioritize your areas of improvement. If you scored low in one area, but you notice all companies score low in the same area, that probably isn't a good focus area.

Officevibe.com

This online resource offers a great suite of tools to help you administer quick surveys, follow up on feedback, and action plan. They also provide templates and benchmarks to help you get started easily. You can try it for free at the link below.

<https://www.officevibe.com/>

Gallup

Gallup has been doing this longer than anyone. They have a lot of resources and a huge database to measure against. They also use only 12 questions as their starting point. The simplicity and history is a great asset.

<https://q12.gallup.com/public/en-us/Features>

Enterprise Solutions (for organizations with at least 300 people)

Korn Ferry is a global HR consulting firm. They have resources and assessments for a wide range of organizational challenges. I've used their Employee Engagement Survey for a number of years when working with larger organizations.

<https://www.kornferry.com/employee-engagement>

2. THE EDUCATION TRIANGLE

In the center of the figure above is the "Education Triangle." These 3 points represent the most powerful aspect of a good employee engagement process. They are the major points of communication through the cycle.

It accomplishes four things:

1. Enrolls more people in the process
2. Gives them a true picture of how the organization is actually doing
3. Drives scores for the next cycle because they see you taking action
4. Demonstrates that you take their input seriously

Enroll Team: This involves a communication plan designed to generate high levels of participation. I've included a communication plan template for you

to tailor to your context. Here you are educating your people about what is happening, and why it matters. You are encouraging participation.

Share Findings: As soon as you get the results and you have had a chance to digest them, report those findings to your team. This helps them see an accurate mirror of what's going on. That transparency builds trust.

Report Progress: Once you've completed the action planning phase and implemented them, it is critically important that you share with the team or organization that you've done this work.

3. ACTION PLANNING SUGGESTIONS

As you share findings it is important to have an eye towards action planning. It is important to involve people in this process and get their input and ideas. Once you've gathered some qualitative suggestions to make progress on key issues, you will need to select what you are going to focus on.

Suggestions for Action Planning:

1. Focus on a **few key issues**, trying to fix everything will be ineffective
2. **Involve** employees (i.e. departmental meetings, focus groups, etc.)
3. Focus on issues relevant to **strategic priorities**, rather than lowest scores
4. Use **external benchmarks** to guide what matters most. If a "high" score lags the benchmark may not be high. Likewise, if a "low" score exceeds the benchmark, it is not as "low" as it appears.
5. Develop action plans that are:
 - a. *Within your control*
 - b. *Realistic and achievable*
 - c. *Important to employees*
6. Take advantage of **existing initiatives**
7. Follow the **Education Triangle**

Once you have a list of various interventions, ideas, and actions for improving key focus areas, a great way to prioritize those actions is to plot them all in the 2 x 2 "Easy/Impact" Matrix. See [Module 5, Video 9: Action Planning Hacks \(Download Templates\)](#)