

THE ENGAGEMENT FORMULA

IMPLEMENTATION PLANNING GUIDE

Note: This *Implementation Planning Guide* is annotated in that it provides lots of explanation as to how to execute each part of the implementation process. The goal is to save you the trouble and bother of having look up this information.

Step One: Create a Full-Engagement Culture that Defines Your Organization and Drives Performance

- **Minimal Distractions—So Employees Can Focus on Performing Their Jobs.** If employees' physiological and safety needs are not fairly well satisfied, this creates distractions which means employees can't give their full energy and attention to performing their jobs.
 - **Compensation**—Employees can't become engaged with their work if they think they're unfairly paid or they're not making enough money to support themselves.
 1. What is your plan to make sure that the level of compensation is sufficient to attract and retain desirable employees?

 - **Benefits**—Remember, the benefits that your organization offers reflect how much it values its employees. Once again, the goal is to minimize the day to day distractions so that employees can focus all their energy and attention on their jobs.
 1. What is your plan to make sure that you benefit offerings are sufficient to attract and retain desirable employees?

 2. It may be important to gather input from employees to find out what benefits are important to them. If so, how do you plan to do this? (Interviews, email questionnaires, meetings with employee groups, etc.)

- **Work Environment**—It should be pleasant and conducive to teamwork and innovation. The work environment also reflects how much your organization values its employees.
 1. How do you plan to solicit input from your employees regarding how the physical work environment can be made more pleasant (more appealing colors, more windows, better lighting, etc.) and what amenities (break rooms, vending machines, onsite day care, workout room, etc.) would they like to see added? (Interviews, email questionnaires, meetings with employee groups, etc.)

- **Job Security**—Employees can't become engaged with their work if their future at the company is uncertain.
 1. How do you plan to communicate to your employees that their jobs are reasonably secure?

- **Single-Status—Everyone is Treated as an Equal.** Remember, equality means autonomy—the freedom to question, the freedom to challenge and the freedom for employees to be themselves, have fun and do their jobs as they see fit. Autonomy is critical because without it, employees cannot pursue satisfaction of their esteem needs which is a very powerful source of motivation.
 1. What changes need to be made in your organization to ensure everyone is treated with the utmost dignity and respect?

 2. What symbols of unequal status need to be done away with? (Things like separate parking lots, separate dining areas, time clocks for some employees and not others, special parking spaces for “important people” and so forth.)

 3. What “us versus them” attitudes and practices need to be changed?

4. What changes do you need to make in the way you share information? (Information should be shared with everyone at once rather than going to the “important” people first and eventually filtering down to the less important people.)

5. To communicate equality and a strong sense of belonging, you might consider adopting a special name for fellow employees as many companies with a high level of engagement have done such as “Family Members,” “Associates,” “Googlers,” “Cast Members,” “Dreamworkers,” or “Zapponians.” What name would you like to use to refer to yourself and fellow employees?

- **Mission—This is What We Do.** This is a brief statement of what your organization does or stands for. For example, the mission Zappos is to “provide the best customer service possible” while the mission of JetBlue is “bringing humanity back to air travel.” In order to be effective, your mission must be understood and embraced by all employees.

1. Does your organization currently have a mission that is understood and embraced by all employees?

2. If not, you need to start from scratch and create a brief mission statement that’s relevant to what your organization does or stands for. If this is the case, how do you plan to involve all of your employees in the creation of your mission? (Keep in mind that if your employees aren’t actively involved in the process of creating your mission, chances are they won’t embrace it.)

- **Core values—This is How We Do It.** Core values communicate how the employees within an organization are going to go about the business of executing its mission. For example, the mission at Zappos is to provide the best customer service possible. They have developed the following set of ten core values that define how the company will go about executing its mission:

- Deliver WOW Through Service
- Embrace and Drive Change
- Create Fun and A Little Weirdness
- Be Adventurous, Creative and Open-Minded
- Pursue Growth and Learning
- Build Open and Honest Relationships with Communication
- Build a Positive Team and Family Spirit
- Do More with Less
- Be Passionate and Determined
- Be Humble

These ten core values represent behavioral expectations for Zappos employees and, in doing so they direct their efforts toward the goals of the organization. For example, “Deliver WOW Through Service,” tells employees that pleasing the customer is not enough. Zappos employees are expected to blow the customers’ socks off. This means continually coming up with new and innovative ways of doing so. “Create Fun and A Little Weirdness” tells employees that they are free to be themselves and have fun while doing their jobs. “Be Humble” communicates clearly that arrogant, condescending and mean spirited behavior is not tolerated at Zappos. Within the context of these core values then, Zappos employees are free to exercise their autonomy to do their job as they see fit. Nobody is there to look over their shoulders.

It’s important to note the way that Zappos went about figuring out its core values because their process produces instant buy-in. CEO Tony Hsieh asked each of the company’s 300 employees at the time to list the core values that the Zappos culture should be based upon. The initial list had 37 core values. During the course of a year, Mr. Hsieh emailed the entire company several times to get suggestions and feedback on which core values were most important to Zappos’ employees. Like-minded suggestions were then grouped together until the exercise yielded the ten core values that continue to drive the company today which now has more than 1,800 employees. According to Mr. Hsieh, “I was surprised the process took so long, but we wanted to make sure not to rush through the process because whatever core values we eventually came up with, we wanted to be ones that we could truly embrace. ...We wanted a list of committable core values that we were willing to hire and fire on. If we weren’t willing to do that, then they weren’t really ‘values.’”

Putting together a set of core values in this manner resulted in instant buy-in from the employees because they came up with them. From that point forward, only qualified prospective employees who mesh with these ten core values get hired.

1. What is your plan to involve all of your organization's employees in developing a list of core values that everyone is committed to?

2. What are some core values that you would like to commit to?

Step Two: Hire Only Qualified People Who Mesh with the Culture

Hiring people under *The Engagement Formula* is not about “filling seats” or hiring based on a resume, it's about finding qualified people who want to do the work that's available and who mesh tightly with your culture. This is why organizations with a high level of employee engagement use their culture (mission and core values) as the primary criterion for hiring new employees.

1. Develop a hiring process that will ensure that your new hires are both technically qualified and mesh tightly with your culture.

The Hiring Process Must be Supported with a Relevant Training and/or Sponsorship Program that Teaches and Reinforces the Culture.

1. Develop a training and/or sponsorship program that will ensure that all new hires quickly absorb and begin to live all the core values of your company.

Step Three: Leaders Must Lead, Not Give Orders

In a high engagement organization, there is no need for leaders to tell their followers what to do and how to do it—they already know this from their organization's mission and core values. Instead the role of a leader is to do whatever it takes to enable his or her followers to do an excellent job. Examples of what leaders do in high-engagement organizations are presented below.

- **Leaders Set the Example.** In a high-engagement culture, leaders set the example when it comes to treating everyone as equals and living the organization's core values. For example, Herb Kelleher, former CEO of Southwest Airlines set the standard when it came to living his organization's core values. It was not uncommon for him to show at an airport,

after midnight, dressed in a set of coveralls and carrying a box of doughnuts to help the cleaning crews clean planes. This sent a very clear message that just because he was the CEO, it didn't mean he was above doing the dirty work required to make an airline successful.

1. What are some things that the leaders at your organization can do to set the example when it comes to treating everyone as equals and living the core values of your company?

- **Leaders Provide Support.** Leaders ask questions, listen and remove barriers and obstacles. In other words, their job is to do whatever it takes to enable the people around them to do an outstanding job. No job is too menial if it enables another employee to do an excellent job. For example, in addition to helping flight attendants pick up trash in the plane during quick turnarounds, the pilots at Southwest Airlines also help gate agents push wheel chair passengers on to the plane so that Southwest can make an on-time departure.

1. What are some things that the leaders at your organization can do to provide support to those around them?

- **Leaders Make Sure the Culture Stays Healthy.** One of the most important aspects of a leader's job is to make sure none of the negative or dysfunctional aspects of the Traditional Management Model work their way back into the culture (symbols of unequal status, leaders trying to tell their followers what to do and how to do it or some employees trying to turn their personal preferences into rules they want everyone else to follow). Leaders are concerned with making sure the culture is working as a system, that teams are coming together, that diverse points of view are occurring and that the best ideas are rising to the surface. One way to make this happen is to set up a cultural oversight group or committee.

1. Develop a plan to set up a cultural oversight group or committee whose purpose is to make sure your organization's culture is healthy and functioning. This group should be made up of employees from all levels of your organization.

2. How often will this group meet?

3. How will this group check on the health of your organization's culture (Interviews with employees, email surveys, meeting with employee groups, etc.)?

4. How often will this group check on the health of your organization's culture?

5. What will be done with the information once it's gathered?