ELECTRICAL CONTRACTORS' GUIDE FOR GREAT EMPLOYERS

ATTRACT, SELECT, DEVELOP, AND ENGAGE TALENT

ELECTRI INTERNATIONAL
THE FOUNDATION FOR ELECTRICAL CONSTRUCTION INC.

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ATTRACTING TALENT

Hiring great people starts with attracting great candidates. Attracting and selecting the best people – the right people – for your organization is a critical and complex task. Doing this well ensures you have a solid pool of candidates from which to select employees who will perform effectively and fit the culture of your organization.

WHY IS IT IMPORTANT?

For most organizations, the track record for making accurate selection decisions is abysmal, and the ability to size up talent is one of the most common blind spots for leaders. The turnover cost of an individual employee ranges from 150 to 200 percent of the base salary of that employee. Some sources say it's as high as 300 percent of base pay. Even a small improvement in the quality of hiring decisions can lead to a meaningful decrease in turnover plus accompanying improvements in productivity, quality, and innovation. To beat the odds from the start, you need to attract and select the right candidates. This takes energy, focus, and a high degree of talent savvy.

WHERE DOES IT TYPICALLY GO WRONG?

When companies fail to attract and select the right candidates, it's usually because of one or more of these shortcomings:

- *A company fails to present a compelling value proposition, an appealing reason for the candidate to select it over other companies providing employment opportunities.*
- *Companies rely on ineffective and tired recruiting sources rather than expanding and invigorating their talent sources.*
- *Selection criteria are incomplete or incorrect.*

Best Practice 1: Create a Compelling Employee Value Proposition

Your company presents a value proposition to your customers – a reason for them to buy from you rather than from your competitors. In the same way, you need to present a value proposition to prospective employees. An effective employee value proposition (EVP) is a "hook". It captures the imagination and provides a compelling reason for potential employees to choose to work for you even in the face of many other opportunities. The EVP provides focus for your recruiting strategy in the same way a unique value proposition (UVP) provides focus for your business strategy. The purpose of the EVP is to tighten and direct the net you're casting into the ocean of candidates. It should captivate candidates who are the best fit and discourage those who do not fit.

Tangible rewards – wages and benefits – are important, but your EVP is primarily based on intangible factors that drive employee engagement.

ACTION STEP

Answer the questions below to help you articulate your EVP and identify the types of employees most likely to succeed in your organization. If you can provide objective evidence when answering these and similar questions, you'll be able to craft an employee value proposition that will attract employees. Discuss the answers to these questions with your current managers and staff. At a minimum, your managers should be able to articulate your EVP.

Ask Yourself:

- *What are the intangible but genuine rewards of working for my business?*
- *Do we have great bosses who have meaningful conversations with employees to set expectations, provide feedback, and provide positive reinforcement?*
- *How do my employees find meaning in their work?*
- *What opportunities do we provide to employees to learn and grow?*
- *Are there strong, positive relationships among co-workers and between staff and management?*
- *How do we celebrate success and progress?*
- *What makes us a winning team?*

Best Practice 2: Widen the Net

Sometimes, companies discover that their usual sources of candidates dry up and no longer provide the volume or quality they once did. In that case, you can "widen the net" by getting creative and identifying nontraditional sources of candidates who will be a good fit for the jobs you have to fill. Always be on the lookout for talent, for prospective employees. You may find great candidates in unexpected places.

ACTION STEP

Review the examples of nontraditional sources of candidates below and think of others relevant to the electrical construction industry and your geographic region. Plan out how you can tap into one or more of these sources by changing where you post for positions. Establish relationships with different organizations, schools, or communities that could be good sources of nontraditional candidates.

- *Those who lack formal education but nonetheless demonstrate potential to learn and grow*
- *Workers who are challenged by disabilities but capable with reasonable accommodation*
- *Formerly incarcerated workers*
- *Any non-traditional employee population based on demographics, e.g., older workers, females, those looking to work part-time, etc.*

Best Practice 3: Develop a Referral Program

Providing modest but meaningful rewards to employees for referring qualified candidates can be a cost-effective recruiting tool. Research shows that new hires who have been referred by another employee tend to perform better and stay at the organization longer.

ACTION STEP

Follow the steps below to design a referral program:

- *Develop a structure with simple rules (and without overly burdensome paperwork) so it is easy for employees to participate. Identify:*
  - *Who is eligible to participate and receive a reward?*
  - *What is the reward and when does the reward pay out? Make the reward appealing enough for people to want to participate. Some examples are: money, time off, gifts or gift cards, opportunities to be placed in a raffle, etc.*
  - *What is the simple process for an employee to refer someone?*
- *Communicate the program widely among your employees and be clear about what you're looking for in candidates.*
- *Consider including customers, vendors and partners as eligible for a reward for identifying good candidates.*
- *Keep employees informed of progress with candidates they have referred.*
- *Prioritize referred candidates if you wish, but use the same selection criteria for referred and non-referred candidates.*

Best Practice 4: Use Complete and Correct Selection Criteria Based on the Job

You need a good pool of candidates from whom to choose, but you also need to identify the criteria on which you will base your selection decision. There are some general criteria that are critical across many jobs and situations. Other criteria should be more personalized depending on what's most critical to the job and to your organization.

When hiring for skilled trades, selection criteria are usually focused on demonstrated technical skills. Intuitively, this makes sense, but consider that while candidates are very often hired primarily for their technical competence, employees are rarely dismissed for technical incompetence. Technical incompetence is relatively rare among experienced workers, and technical competence can be developed in the inexperienced. Skills related to workforce behaviors and relationships are those that are more difficult to develop and most often what cause people to have problems on the job. If you hire for attitude and train for technical skills, you'll likely expand your pool of candidates and end up with better employees in the long run.

ACTION STEP

Determine the top 3-5 qualities that are most important for success in the position.

- *Consider the job description, the context of the role, the performance environment, and short- and long-term expectations of performers in the role to weight and prioritize the criteria for selection, including both technical skills and critical behaviors.*
- *Consider what would help you differentiate acceptable candidates from great candidates. For example, would someone excel in the position if he/she had skills such as: managing conflict, planning, negotiating, listening, excellent communication, ability to get along with others, customer orientation?*
- *Before looking for candidates, determine if you need someone who will stay in the position long-term or someone who has the potential to move up in the future? You need a balance of each, but as you prepare for interviewing, you need to know which you are looking to hire. Look at the mix on the current team of your "steady eddies" and those with upward potential. Determine what you need in the next position for which you are hiring.*

Best Practice 5: Use Universal Selection Criteria to Gauge Potential in Professional and Management Positions

There are universal qualities to consider when assessing an employee's potential for upward mobility or an expanded position: motivation for the job, intelligence/cognitive ability, and experience.

ACTION STEP

If the position is one that entails an ability to expand and grow, identify which characteristics you will include in your selection process. Consider the following:

- ***Motivation** is a combination of energy and desire for achievement. If you've articulated your employee value proposition and clearly spelled out what it takes to be successful in your company, your candidates will self-select for roles in which they are naturally motivated.*
- ***Intelligence** is required in all positions. Research indicates that regardless of the role, intelligence accounts for much of the variance between successful and less successful employees.*
- ***Experience** demonstrating success in a role is highly predictive of success in similar roles.*

The section titled Interviewing Effectively will address how to assess the qualities reviewed in Best Practices 3 and 4, based on your observations and carefully crafted questions.

To attract and hire great people, you must have an environment where great people want to work. Articulating the value you can provide to potential candidates, and having great clarity on what qualities define a great employee at your company, will move you in the right direction.

Ask Yourself: Questions for Reflection

Consider how these factors might attract or deter someone from wanting to work for you or for your company:

- *What's your reputation in the industry? In the community?*
- *How do your employees interact with customers and with each other?*
- *Does your company do quality work that is admired by customers?*
- *How do your managers treat their employees?*

REFERENCES

The references below are helpful if you want to learn more about Attracting Talent:

Thoughts on the Employee Value Proposition
https://www.linkedin.com/pulse/thoughts-employee-value-proposition-kim-ruyle/

Lessons From a CEO's Journal: Leading Talent and Innovation (Chapter 2) by Kim E. Ruyle

Why the Best Hire Might Not Have the Perfect Resume with Regina Hartley
https://www.ted.com/talks/regina_hartley_why_the_best_hire_might_not_have_the_perfect_resume?referrer=playlist-talks_on_human_resources

INTERVIEWING EFFECTIVELY

An interview is more than a routine conversation to review a candidate's work history. It is an opportunity to engage the candidate in a rigorous and consistent exploration of capabilities, motivation, and fit with the job and your organization.

WHY IS IT IMPORTANT?

Assume you've attracted a qualified pool of job candidates. The next step is to select the very best from among those qualified. In addition to reference and background checks, interviewing is a key step in that selection process. Interviewing well will lead to better quality hires and to employees who are productive, fit in with their coworkers, and are more likely to stay long-term.

WHERE DOES IT TYPICALLY GO WRONG?

Interview time should be spent in a substantive investigation of candidate capabilities and fit, but often this doesn't happen. Some common interviewing mistakes are:

- *Not being prepared*
- *Spending too much time in small talk in an effort to put the candidate at ease*
- *Spending time rehashing the candidate's resume or application*
- *Using unstructured and/or hypothetical questions*
- *Asking questions not core to the most valuable selection criteria*

These mistakes can create situations in which candidates have significantly different interview experiences and managers end up with mostly subjective impressions, which don't lead to accurate or legally defensible decisions. The good news is that these disorders can mostly be cured if hiring managers follow the simple guidelines below to conduct structured, behavioral-based interviews.

Best Practice 1: Use a Structured Interview Process, Including Questions You Will Ask All Candidates

ACTION STEP

Create an interview guide that asks questions getting at the five to seven criteria critical to success in the position, with one or two questions per criterion. If there are multiple interviewers, each should have a distinct interview guide with different questions to assess the criteria.

— continue on next page

- *Focus on Behavior. Look for behavioral evidence of competence in your prioritized selection criteria. Avoid hypothetical questions. The idea is to ask candidates to speak to actual experience – actions taken – rather than responding in hypotheticals. For example, a hypothetical question might be, "How would you resolve conflict between team members?" The problem with that approach is it leaves the door open for the candidate to say anything that might be deemed a good response.*
- *As you craft interview questions, they should generally take the form of:*
  - *Tell me about a time when <you exhibited this particular behavior>. What happened and what was the result?*
- *Some other ways to ask behavior-based questions:*
  - *Tell me about a time when you did this well and got good results.*
  - *Tell me about a time you did not do this well and what did you learn from the situation.*

Below are sample criteria, along with possible questions that can help you evaluate the candidate on that specific criterion.

Selection Criteria: Job Specific	Sample Interview Questions: Skilled Trades	Sample Interview Questions: Skilled Trades
Execution: *Plans and Prioritizes, Improves Processes*	*Tell me about a time when you identified a process that could be done more effectively or efficiently. What steps did you take to change it and what was the result?*	*Tell me about a time when you identified a process that could be done more effectively or efficiently. What steps did you take to change it and what was the result?*
Judgment: *Understands the Business, Applies Sound Intuition*	*Tell me about a time when you had to make a difficult work decision that could impact the outcome of a project. How did you go about making the decision? How did it turn out?*	*Tell me about a time when your knowledge of the business helped you make a decision that was better for the business or the customer. What did you do? What was the result*
Relationships: *Managing Conflict, Interpersonal Skills*	*Tell me about a time when you had difficulty getting along with a co-worker. What did you do to resolve the situation and how did it turn out?*	*Tell me about a time when you had difficulty getting along with a co-worker. What did you do to resolve the situation and how did it turn out?*
Influence: *Listening, Excellent Communication*	*Tell me about a time when your listening skills made the difference between a good and bad outcome for a customer. What did you do and what was the result?*	*Tell me about a time when your ability to communicate well had a positive impact on a task or assignment. What did you do to communicate well and what happened?*
Learning: *Explores New Areas of Knowledge, Actively Seeks Feedback*	*Tell me about a time you took it upon yourself to learn something new that would help you in your job. What was it and how did you go about learning it? What was the result?*	*Tell me about a time when you asked for feedback on a project or assignment you completed. Why did you ask, what happened, and how did you react?*
Customer Orientation	*Tell me about a time you went over and above for a customer. What did you do and what was the result?*	*Tell me about a time you went over and above for a customer. What did you do and what was the result?*
Technical/functional competence	*Ask for demonstrated evidence of the specific skill.*	*Ask for demonstrated evidence of the specific skill.*

Here are some examples of interview questions to assess a few traits that predict success in leadership roles:

Selection Criteria: Leadership	Definition	Sample Interview Questions:
Assertiveness	*Willing to disagree and express unpopular positions*	*Tell me about a time in which you took an unpopular position or were the only one to disagree with a leadership decision. What did you do? What was the result? What did you learn?*
Curiosity	*Explores a wide range of topics that have business implications*	*What trends in technology (or some other topic outside candidate's areas of expertise, e.g., demographics, economics, etc.) are most likely to have an impact on our business? Why? How did you come to this point of view?*
Judgment	*Considers all relevant factors to make thoughtful, high quality decisions*	*Can you tell me about a time when your judgment failed you, when you made a bad decision? What led you to your decision? What was the result? What did you learn?*
Influence	*Highly credible and able to articulate a unique and well-developed point of view*	*Please tell me about a time in which you had a great idea or recommendation but were unsuccessful in persuading others. What was your approach? Why did it fail?*

Best Practice 2: Prepare Effectively for the Interview

Interviewers should familiarize themselves with the candidate's background and review the questions they will ask each candidate. This helps save precious interview time on the most important topics and helps drive greater consistency into the process.

ACTION STEP

Prior to the interview, review available background information about the candidate – resume, application, references, credentials, etc. Prepare and become familiar with an interview script from which you will not stray too far during interview.

- *The script should have a short introduction to set expectations for the candidate and remove ambiguity to reduce any anxiety the candidate might be experiencing. Additionally, your script should include a set of questions you'll pose to address the selection criteria you've prioritized in advance.*
- *If you're prepared and relaxed, it will help put candidate at ease as emotions tend to be contagious. The interview is about the candidate, not about you. Lose the ego. Smile. Relax. Go into the interview mentally prepared to listen and engage actively with the candidate.*

Best Practice 3: Provide Consistent Structure with Each Candidate

Giving each candidate a similar experience allows interviewers to compare apples to apples. Asking one candidate about his/her prior company and the ability to make decisions and asking another candidate about technical knowledge and interpersonal skills will not allow you to compare the candidates effectively.

ACTION STEP

Follow your interview script with each candidate. That's not to say you shouldn't be prepared to ask follow up questions and even improvise a bit if the candidate opens the door to something unexpected. Have back-up questions for each selection criterion you're investigating so you can toss out an alternative question if the candidate falters or gets stuck on a primary question. If a candidate is really stuck, you can prompt the conversation by pointing out a specific experience you see in the application or resume and suggest applying the question to that experience. Your goal isn't to stump them, but to really evaluate their capability to do the job. Listen for information about the context, what the candidate learned from the situation, and perhaps how it was then applied it in other situations. This is where follow-up questions can be used to guide the candidate to expand the response.

Best Practice 4: Document the Interview Discussion

Don't rely on your memory. You will want your notes to help you distinguish between the answers each candidate gave so you can make a good decision on who demonstrated competence. Biases can have a greater impact on your decisions without notes to refer to (see Best Practice 6: Understanding and Managing Implicit Bias).

ACTION STEP

Take notes throughout the interview. For each question posed to the candidate, record key phrases and themes that provide objective evidence of the candidate's demonstrated capabilities. Capture any concerns that arise about fitness for the role.

Best Practice 5: Conduct Background and Reference Checks

Background checks involve determining whether an applicant may be unqualified for a position based on criminal conviction history, moving violations, or misrepresenting personal background. When companies conduct reference checks, they contact prior employers, supervisors, or others who can attest to the candidate's skills and character.

ACTION STEP

Determine if you want to incorporate background and reference checks into your selection process. Here are reasons some companies decide to do so:

- *To prevent hiring candidates based on falsified background and information.*
- *To evaluate the person's driving record if employees are driving on behalf of the company.*
- *To avoid hiring candidates with convictions of sexual assault or other criminal convictions.*

Laws and regulations vary by state, and in some cases, by county or city. You must educate yourself on relevant laws surrounding background checks. Reputable background check providers will help you stay compliant.

Reference checks can be conducted by calling previous employers to verify dates of employment, job and duties performed, and reason for separation. Note that some employers will provide only minimal information. Some information may be gleaned from online sources such as professional networking sites, like LinkedIn, or sites such as twitter. However, it is advised that you consult an attorney to help you craft a social media screening policy before heading down that path as it can provide legal concerns if you use information not related to the requirements of the position for which the individual is applying.

Best Practice 6: Understand and Manage Implicit Bias

Biases can steer you wrong. Becoming familiar with them and consciously labeling them when detected can help you from going into the ditch and making a bad hire. When we meet people for the first time, our brain makes many assessments in a matter of seconds, and for the most part, we are largely unaware of the discriminating view our brain is creating. Regarding employment potential, especially leadership potential, we might view people more positively, based on physical attributes such as height and attractiveness. As soon as a person starts to speak, we assess his or her intelligence. We infer confidence and capability based on someone's posture, fitness, handshake, and voice.

Biases are mostly implicit – they operate below the level of our consciousness. Implicit bias isn't always a bad thing, but it certainly becomes bad when bias rises to consciousness and becomes unwarranted prejudice. Cognitive biases affect all types of decisions, not just talent selection decisions.

ACTION STEP

Read and familiarize yourself with the biases described below. Having a better understanding of biases that affect all of us can help you steer clear of the problems they can create for us in the selection process.

- ***Similar-to-Me Bias.*** *We're all susceptible to this, and it impacts every area of talent management. Similar-to-me bias is preference we have for others who are like us. We are drawn to people who share our interests, care about similar things, dislike and disapprove of the same things, and have a similar socio-economic background. Likewise, we're prone to dislike, distrust, and avoid people who are different from us. There's certainly nothing wrong with liking the people with whom we work, but similar-to-me bias can cause us to pass over the best candidates in favor of subpar candidates who mirror us. Naturally, this will limit diversity in our workforce.*
- ***Confirmation Bias.*** *Confirmation bias leads us to lend credence to information that supports our beliefs and to discount information that contradicts our beliefs. If, for example, you have a strong opinion that one school is much better than another, you will emphasize more positive attributes of candidates from this school and nitpick a candidate from another one.*
- ***Recency Bias.*** *We tend to give more weight to evidence and information that is recent and to discount information less recent but otherwise no less valid. When interviewing a string of candidates, the most recent may have an advantage due to recency bias.*
- ***Anchoring Bias.*** *The first piece of information we receive is elevated in importance and provides an anchor against which we weigh other information. Anchoring bias could be at play when your first exposure to a candidate comes from a glowing letter of reference. The information provided by the reference may be unrealistic or inflated, but might still have an outsized influence on your assessment of the candidate because it's the first piece of information you received.*
- ***Halo Effect / Horns Effect.*** *These well-known biases occur when one piece of information overshadows other information to influence our decisions. As an example of the Halo Effect, we're likely to infer a physically attractive candidate is superior in unrelated aspects. Likewise, learning that a candidate was a champion high school athlete might lead us to view him/her more positively in a wide variety of characteristics. Conversely, we may infer that a candidate who speaks in a squeaky voice is inferior in unrelated ways because of the Horns Effect.*

If you can, perhaps through the use of technology, scrub biasing candidate information from pre-interview documentation. Demographic data and even names associated with ethnic groups will instigate implicit bias and may prevent the best candidates from passing the pre-interview screening.

Clearly, it's not possible to eliminate bias, nor would we want to eliminate all bias. It helps us make more rapid decisions. The problem is that cognitive biases can lead us to make bad decisions. Biases may be mitigated by labeling them and reflecting to consider what possible influence they are exerting before making a decision.

No matter how much time you spend checking references and interviewing to assess candidates, you will never eliminate all uncertainty from your hiring decision. People are complex, like a big jigsaw puzzle, and we never fully see or comprehend every puzzle piece. If you fill in as many pieces as you can and focus on the most important without fixating on one or two, you will improve your selection decisions considerably.

Ask Yourself: Questions for Reflection

Consider how these factors might impact the effectiveness of the interview process:

- *Do you take the process seriously, making sure you're looking for the most important candidate qualities for success on the job?*
- *Did you objectively compare and contrast all interviewed candidates on the most important selection criteria?*
- *To what extent is the candidate's similarity to you influencing your decision?*
- *Have you considered other ways in which you might be unduly biased?*
- *Are you allowing the urgency to hire a candidate to cause you to make a hasty decision?*
- *Have you considered input from several other knowledgeable stakeholders before selecting the best candidate?*

REFERENCES

The references below are helpful if you want to learn more about Interviewing Effectively:

Interviewing Right: How Science Can Sharpen Your Interviewing Accuracy by Robert W. Eichinger and George S. Hallenbeck, Jr.

Lessons From a CEO's Journal: Leading Talent and Innovation (Chapter 2) by Kim E. Ruyle

10 Ways to Have a Better Conversation with Celeste Headlee
https://www.ted.com/talks/celeste_headlee_10_ways_to_have_a_better_conversation?referrer=playlist-talks_to_watch_before_a_job_in

ONBOARDING TALENT

Onboarding is more than just filling out some paperwork and learning about benefits. It is a structured process to integrate new employees quickly into the organization and into their role so they can begin contributing and understanding how to support the organization's goals and values. Onboarding aligns the new employee with the norms of team behavior and the goals of the team and the company.

WHY IS IT IMPORTANT?

One-third of all external hires are no longer with an organization after two years, frequently citing reasons such as lack of clarity of responsibilities, ineffective training, and lack of help from managers and co-workers. Engaging early with new hires can ultimately determine how hard someone will work for you and whether the employee will be committed to staying at the organization.

Some companies fumble their way through onboarding or recreate the wheel every time a new hire comes on board. Done well, onboarding will improve employee engagement, retention, and productivity, and will accelerate performance. Employees who are engaged in their work and committed to their organizations give companies crucial competitive advantages.

WHERE DOES IT TYPICALLY GO WRONG?

Issues with onboarding typically involve:

- *Recreating the onboarding process every time someone is hired*
- *Lacking structure altogether, resulting in inefficiencies and a poor first impression*

Best Practice 1: Structure onboarding based on critical milestones

Plan onboarding by tying key information the employee will need to a specific time period:

- *Before the first day*
- *First day*
- *First week*
- *First month*
- *First quarter*

ACTION STEP

Design an onboarding process with the help of a group of high performing employees, particularly those who have been with the company for three-to-five years. As the front-line, they will have excellent insight into what is truly needed to be productive and to feel welcome in the first few months on the job. They will remember what they learned the hard way, what was most helpful in their onboarding (or what would have been), what resources they had (or wished they had), and who served as great sources of insight.

- *From there, you can create a job aid for managers in charge of hiring, a checklist of sorts, addressing what needs to be done to onboard the new hire, including the questions to be answered, when, and by whom.*
- *A process should be put in place to initiate onboarding as soon as an offer is accepted. Multiple groups/people need to be informed of a new hire's start date and must have access to the onboarding plan: HR, the new employee's manager, IT, security, and others who have a role in the schedule you have created.*
- *The new employee's onboarding plan should be well-coordinated, identifying the meetings and tasks that are important, when these things should happen, and with whom. Without this level of detail that specifically assign actions and a schedule, things will slip. This not only causes inefficiencies in the onboarding process but can serve as a way to disengage your newest employee right out of the gate.*
- *Consider designated time intervals (before first day, first day, etc.) to identify the key things that need to happen to prepare the employee to onboard effectively, learn about the job and the company, and become self-sufficient in a reasonable time frame. Clearly identify the what, when, and who. The first day and first week will likely be more tightly scheduled than the remainder of the onboarding period, but not necessarily so if formal training is required during the first few months.*
- *Make sure the people who are part of the onboarding have blocked off time in preparation for the new hire's start date, either through calendar software or other methods.*

Onboarding will provide answers to likely questions from new employees. Here are a few examples:

Ambiguous terms are often cited in corporate values and cultural aspirations, e.g., We value **courage** or **risk-taking**, etc. Employees often struggle to know what behaviors demonstrate courage or appropriate risk-taking. It's helpful for organizations to provide examples of desired behaviors and also **non-examples** to illustrate inappropriate related behaviors.

- ***Regarding deliverables:*** *What are my deliverables? How are my deliverables measured? How do my deliverables impact my team and the broader organization?*

- ***Regarding people:*** *Who are the people with whom I need to be familiar? With whom should I be personally acquainted? Who can answer key questions? Who can make key decisions? Who can provide me with resources I need?*

- ***Regarding tools, facilities, procedures:*** *Where's my workstation? The restroom? The cafeteria? When do I get paid? How do I enroll in benefits? How do I submit an expense report? What tools or applications do I need? How do I use them? What resources are available to me to aid in my learning?*

- ***Regarding organizational culture:*** *What does this organization really value? What are examples and non-examples of related behavior? What generally surprises new employees about working here? What gets people in trouble around here?*

- *What's the organization's history? What are the legends of successes and failures?*

Below are some guidelines for what your employees will need at different intervals.

BEFORE START DATE

Onboarding needs to begin well before the start date. That's when lots of information is generated and provided to the candidate, the hiring manager, and others. You want to make sure you've provided enough information to candidates so they feel prepared and confident when they walk through the door on their first day. You also need to set up a workstation, order specific tools and equipment they will need, install computer programs, prepare payroll and security documents for signature, etc. It's inexcusable to be unprepared for the arrival of a new employee. The first day is incredibly important.

Key points to include before start date:

- *Identify what the employee needs to know before starting: location at which to report, person to ask for upon arrival, what time to arrive, what item(s) to bring.*
- *Start to acclimate new hires to your culture before they start. How they are treated throughout the hiring process and in preparation for their first day will leave a lasting impression.*
- *Identify what you and your colleagues need to do before the new hires start. Some examples are: where will they store personal belongings, what access will they need (computer system login and passwords, security card, etc.), what tools, equipment, or resources need to be available to them when they start?*

FIRST DAY

If the period before the start date is important in the onboarding process, the first day is crucial. Some employees start doubting their decision to accept your employment offer on the first day, and this can have lasting effects on engagement and longevity with the company. The employee's hiring manager must be on hand to welcome the employee at arrival and spend some time in a welcome conversation before jumping into the first-day paperwork.

After signing forms, receiving benefits information, perhaps getting a security badge, etc., the employee should spend additional time with the manager or a teammate who should help introduce the new employee to their team and get acquainted with the workspace. The new hire should have a lunch partner, preferably his/her manager. If for any reason the hiring manager is unable to greet the new employee or be available for lunch, the boss's boss should fill in.

Key points to include on the first day:

- *Block time in calendars for those who will meet with the new hire on the first day.*
- *Identify what is most important in your company for the new hire to learn, see, and do on the first day on the job. This will vary somewhat by role, team, etc.*
- *Don't let new employees spend hours reading boring materials. They likely won't remember much anyway, because they don't have any experiences at your company against which to apply what they're reading.*

FIRST WEEK

The first week should be devoted to acclimating the employee to the company's goals, values, and to the employee's specific job, expectations, and resources available.

Having a detailed plan for at least the first week is important so the employee isn't sitting around wasting time. The first week can be filled with get-acquainted meetings with coworkers who are important to the role being filled, as well as shadowing others, and understanding the specific job expectations and performance measurement.

Key points to include during the first week

- *Every new employee should be assigned one or two buddies, one from his/her own department and another from a different department. These buddies are responsible for providing information, facilitating important introductions, and answering questions to help the new hire.*
- *The business owner or most senior leader also has a role in onboarding. The leader should make time to welcome each new employee in order to get acquainted. This person is typically a great source of information about the history and culture of the organization.*
- *As with the first day, you'll need to prioritize what is most critical for the new hire to know in this first week. Include having the new hire spend a lot of time with the manager and team.*

Here is a sample structure that illustrates a few steps for an onboarding process:

Timeframe	Topic	Key Points	Responsible Party	Specific Timeframe
Before first day	*Welcome letter*	• *Welcome message* • *Information about where and when to report on first day* • *Introduction to values and culture*	*HR or Manager*	*At least one week prior to start date*
First day	*Introduction with Manager*	• *Get to know manager* • *Discuss the culture of the organization and the team* • *Key work/projects that will be priority in coming weeks/months*	*Manager*	*Within first hour of new hire's arrival*

Best Practice 2: Continually improve the onboarding process, based on input from employees

The onboarding process should be updated as necessary, based on new information that needs to be incorporated and feedback about what is and isn't working.

ACTION STEP

A few times a year, ask for feedback on the onboarding process from those who have gone through it. Continuously improve your onboarding by understanding what is and isn't working well. Create repeatable processes, where possible, and encourage managers to do the same to increase efficiency and consistency for each new hire experience. Your managers shouldn't be "winging it" every time a new hire starts.

Best Practice 3: Tailor Onboarding Processes for Senior Talent and Internal Transfers

Interviewers should familiarize themselves with the candidate's background and review the questions they will ask each candidate. This helps save precious interview time on the most important topics and helps drive greater consistency into the process.

SENIOR TALENT

Onboarding is not just for entry-level new hires. It can also be a powerful tool for engagement and for ramping up productivity of new hires at a more senior level as well as those changing positions internally.

Effective onboarding can be even more critical for senior positions. Without special effort, it is less likely to be done rigorously. Senior personnel will be quick on the uptake and likely impatient with a drawn-out onboarding process, but to get them up and running effectively, they too need some onboarding. This might lead a company to take shortcuts.

ACTION STEP

Don't take shortcuts but do change the process for senior positions.

- *Accelerate the basics. They probably don't need a guided tour to be able to find the restroom. Spend more time on both the cultural perspective and the overall business perspective, e.g., customers, competition, industry, revenue model, etc.*
- *To encourage senior people to acclimate to your culture, understand expectations of their roles, and avoid derailment, check in with them, their peers, and their team early and often so you can gauge how they are progressing and can course-correct as needed.*

INTERNAL TRANSFERS

Employees who move internally within a company may already display high levels of performance, engagement, and commitment. However, don't overlook them because they are already familiar with the organization. If they are changing teams or changing roles, some level of onboarding may prove time well-spent. Taking this approach will continue to drive engagement or, if neglected, could turn off a previously engaged employee.

ACTION STEP

Create a slimmed-down onboarding process for internal transfers.

- *Ensure transferring employees are clear about their new roles and new expectations.*
- *Help build a support system and develop a relationship with the transferee's manager*

Ask Yourself: Questions for Reflection

Consider how these factors might impact the effectiveness of your approach to onboarding:

- *Do you have a clear checklist of everything that needs to be done to prepare for an employee's first day?*
- *Do you and your managers take the onboarding period seriously, knowing the connection to productivity and engagement?*
- *Are your employees welcoming of new people and caring about their success, or do they let the new people figure things out on their own?*

REFERENCES

The references below are helpful if you want to learn more about Onboarding Talent:

The First 90 Days: Proven Strategies for Getting Up to Speed Faster and Smarter by Michael D. Watkins

Lessons From a CEO's Journal: Leading Talent and Innovation (Chapter 3) by Kim E. Ruyle

10 Best Practices to Improve Employee Onboarding
https://www.youtube.com/watch?v=sakIHJNwxmU

DEVELOPING TALENT

In order to succeed, companies continually need to learn and adapt to their environment. This requires their employees to be able to do the same. A large aspect of any manager's role is paying attention to the employees' learning and development needs.

WHY IS IT IMPORTANT?

Our ability to learn to do something new is the foundation of innovation, strategy, process improvement, and all manner of organizational change initiatives. Learning ensures our businesses stay relevant and survive in an ever-changing competitive landscape. Having the opportunity to learn and grow is also a powerful driver of engagement.

Performance problems can result if an employee encounters something new – a new job, a new process, a new technology, even a new customer – and struggles to acquire the necessary knowledge and skills to adapt effectively. When employees face new challenges, they must scale a learning curve. Often, they can climb that learning curve without assistance – if they're motivated, they'll figure things out. But, sometimes, the learning curve is so daunting or the consequences of failure are so severe that learners require a boost up that learning curve. That's where the appropriate training or development intervention must come into play.

WHERE DOES IT TYPICALLY GO WRONG?

Some issues that emerge in the area of Talent Development are:

- *Treating training as a fix to all performance problems*
- *Lack of follow through in application of learning and in accountability*
- *Applying the same approach to all employees*

Best Practice 1: Identify Development Opportunities Based on an Employee's Needs Relative to the Job

All employees have strengths and weaknesses that may or may not be applicable to the particular position they hold. The most successful people have strengths appropriate for their role and do not have any significant weaknesses that can derail them. The optimum blend changes as careers advance or as jobs change. Some competencies are critical for an entry-level individual contributor but cease to be so important when the person begins managing others.

ACTION STEP

Managers must determine their employees' specific skills and competencies that lead to success in a position. Likewise, they must be able to identify weaknesses that can get in the way of success.

There are three primary considerations for deciding the focus of development:

1. Consider what is important. What competencies are critical to success in your role and the roles you manage?
2. Evaluate the strengths and weaknesses of those on your team.
3. Acknowledge the difficulty of developing key skills. Some competencies are much more difficult to develop than others. They take more time, more effort, and more practice.

Best Practice 2: Determine the Root Cause of Performance Issues before Applying a Solution

Training by itself isn't going to fix an employee's skill or competency gaps. There is no one-size-fits-all approach to learning.

ACTION STEP

Determine if the lack of skill or competency is rooted in:

- ***1. Something in the environment that is hindering performance.*** *Usually, the first place to look is the performance environment. Managers are responsible for the performance environment. They provide direction, set the pace, provide tools for the job, remove obstacles that aren't in the employee's control, reinforce good performance, and correct substandard performance. If an employee isn't performing as expected, look first to make sure managers are doing their jobs and hindrances are removed from the environment.*
- ***2. A lack of motivation or desire to perform as expected.*** *When there's a motivation issue, it's often just a symptom of the true root cause, the environment. You hire people you believe to be competent and motivated, and they almost always start the job with a good attitude. They want and expect to succeed. If that changes after some time on the job, if employees lose their motivation, the environment is the most likely cause. The environment demotivated the employee – the employee didn't come with the bad attitude. In other words, your managers haven't done their job. They haven't taken care of the environment.*
- ***3. A lack of knowledge of what to do or how to do it.*** *This issue should be addressed by learning and development interventions, such as training, on the job learning, shadowing, mentoring, etc.*

Best Practice 3: Individualize Development Actions Based on an Employee's Needs

Training and development are two related and overlapping activities that serve to enhance the knowledge and skills of the workforce. Training and development vary in terms of timeframe, focus, and methods.

- *Training refers to activities that are focused on particular competencies (often technical), impact current and near-term performance, and consist of managed events that adhere to particular design specifications.*
- *Development has a long-term impact and is not an event. In fact, development is a messy process tangled up with (and sometimes indistinguishable from) the job itself.*

Training and development are not distinct or mutually exclusive. Both build capabilities and cause learning to occur. Both create a fundamental change in the learner. And both lead to enhanced performance and contribution to the organization. You can't really divorce development from job assignments—most learning will occur on-the-job.

ACTION STEP

Once you identify the specific strengths and gaps on your team and the root cause of the gaps, you can identify the right intervention to get and keep your employees on track. Some potential interventions are discussed below:

TRAINING

Training is one option to take when you have a problem caused by a lack of knowledge and skills. Training is an event, an experience designed to cause learning. Training includes:

1. Content (concepts, principles, procedures, rules, etc.) related to what's being learned
2. Opportunities to practice the behavior that demonstrates learning
3. Evaluation and feedback on the practiced behavior

Some training programs are designed to be navigated independently at a pace chosen by the learner, often enabled by technology. Other programs rely on an instructor in more of a classroom-style event. The right approach should be determined based on the best way to learn the content needed, as well as the personal learning style of the employee. Some employees do well in self-directed learning, while others excel more in instructor-led training.

JOB AIDS

As you consider your approach to training, also consider job aids. Just as a tool leverages your physical capabilities, a job aid leverages your mental capabilities. Examples include apps of all sorts—and not just computer-based apps. Job aids include checklists, decision aids, calculators, algorithms, flow charts, etc. Job aids make us smarter. They store job intelligence outside the learner and serve as a great way to document expertise and reduce the need for training. Apply job aids as a way to simplify complex jobs and ensure that critical tasks are done correctly. Job aids are typically unnecessary for tasks that are done frequently as a routine. Routine tasks are naturally learned and reinforced with frequent execution.

ON-THE-JOB DEVELOPMENT

To develop more complex skill sets, we accelerate the learning process by doing the following:

- **Provide focus.** We need to point our employees in the right direction. Most learning occurs when employees are uncomfortable, but managers may need to nudge employees to stretch themselves. Help your employees focus on what's important, not on what's most comfortable.
- **Set expectations.** Let employees know what skill sets are most critical for the success of the business. Help them understand that, as in life, most learning occurs when we're in challenging situations.

- **Create opportunities.** We learn by doing. Assigning employees to jobs in which they will learn key competencies and gain needed perspectives on the business is the single most powerful way we can develop employees. We also have to look beyond full-time jobs to projects, task forces, and other extracurricular and part- time assignments that stretch employees beyond their current job without requiring them to leave that job. Your managers need to learn to spot those opportunities where they do exist and create legitimate opportunities where they don't exist. They need to learn to match employee needs with the skills and perspectives taught by those opportunities. Managers need to be highly skilled at delegation, which, in this case, is the primary vehicle for development.

- **Assess and reinforce.** If you want to accelerate development, you need to be timely with feedback so employees can more frequently adjust and practice new behaviors. In a training event, there is practice, assessment, and feedback built into the design. Without the structure of a training event, your managers need to be proactive to monitor progress toward development goals, provide feedback, and reinforce advancement. They should recognize efforts made in the face of challenges. It's almost impossible to overemphasize the importance of feedback and reinforcement. It should be the centerpiece of many meaningful conversations between your managers and employees.

- **Make learning connections.** Have meaningful conversations with employees about lessons learned. Ask them how they're applying previous learning to their new challenges. Encourage them to reflect. Ask them to verbalize what they've learned. Point out the impact of their behaviors on their team and the organization. Point out the implications for what they're learning. By doing this, you're helping them develop emotional intelligence. Self-awareness - the ability to self-monitor accurately - is a key component of emotional intelligence and an enabler of self-directed learning.

- **Make network and coaching connections.** Connect employees to others who are on similar developmental paths. Connect them to those who have previously navigated similar learning experiences. Facilitate relationships in which your employee can learn from being coached and from coaching someone else on what they know. Learning organizations are those in which nearly everyone is a coach to someone else. Often the coach gains more from the coaching than the learner. The truth is that a culture of coaching elevates learning across the organization. You and your managers can create such a culture.

Regardless of the approach used, there must be focused learning, practice in a real environment, and feedback on learning and progress.

Best Practice 4: Invest your Training and Development Resources in a Way That Will Bring you the Best Return

Spreading training resources across the workforce like butter on bread is poor resource management. Financial acumen dictates that capital should be invested where it provides the best return. This approach applies to training and development just as well as it does to other capital allocation decisions made by the business.

ACTION STEP

Determine how you want to invest time and money in training and development. Consider who will get the most out of the investment, and under what circumstances your company will invest. Here are some points for consideration:

- *Every employee will likely want to be offered the opportunity for training and development, even if the opportunity isn't seized. Those opportunities should vary from individual to individual.*
- *Differential treatment is fair treatment, if based on job performance, job requirements, and one's potential. Everyone won't get the same opportunities.*
  - *Some employees serve in roles that require more training and development because job requirements and associated technology change so rapidly. These employees should be offered just-in-time training to get them up to speed quickly.*
  - *Some employees deserve more training and development because they, by virtue of their potential, are on an accelerated career path that introduces rapid change and repeated stretch assignments. Once your employees have the skills needed for proficiency in their jobs, training and development time, money, and effort should generally be allocated to those with the most potential.*

In an ever-changing business environment, companies can't afford to have stagnant employees. It's important that leaders are attentive to the learning and development needs of their organization and understand the various approaches available to them.

Ask Yourself: Questions for Reflection

Consider how these factors might impact your efforts toward Developing Talent in your organization:

- *Do you use different methods to train and develop based on employee needs?*
- *Do you know in whom your organization should be investing more?*
- *Do you track the additional learning needs when job requirements and/or technology and tools change?*
- *Do you and your managers have the skills to delegate effectively, an important component of development?*
- *Do you and your managers have the skills to coach and provide effective feedback, both positive and developmental?*

REFERENCES

The references below are helpful if you want to learn more about Developing Talent:

Accelerating Development – Part 1
https://www.linkedin.com/pulse/accelerating-development-part-1-kim-ruyle/

Lessons From a CEO's Journal: Leading Talent and Innovation (Chapter 5) by Kim E. Ruyle

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DRIVING ACCOUNTABILITY

Good management is about setting expectations, giving direction, providing feedback and coaching, reinforcing desired behavior, correcting undesired behavior, recognizing achievements, and differentiating people in order to allocate their development opportunities and rewards appropriately. This collection of activities is generally known as performance management.

As traditionally implemented, performance management is a process that starts with goal setting at the beginning of a business cycle, typically a calendar- or fiscal-year. Each employee has performance goals set at the beginning of the year, and those goals are the basis for feedback and coaching, often done formally in a mid-year review. Development coaching is often formally included in the process, as well. At the end of the year, performance is reviewed and assessed against goal achievement. The employee receives a final rating, which feeds into compensation decisions.

WHY IS IT IMPORTANT?

When done well, performance management enhances employee engagement, shapes organizational culture to reflect desired values, and aligns employees to the firm's strategic intent. When done well, performance management optimizes performance and positively impacts every key performance indicator for your business – revenue, productivity, quality, customer loyalty, and more.

When an organization does not have an effective performance management structure, it can lead to a culture that lacks accountability for performance and results. When done poorly, performance management not only hurts business performance, it can destroy morale, create a toxic organizational culture, and drive away those employees you most want to retain.

WHERE DOES IT TYPICALLY GO WRONG?

Issues with Accountability fall into a few categories:

- *Managers are unskilled at coaching and delivering feedback.*
- *Companies treat critical activities like a checklist and don't get true value from their effort.*
- *The approach used is inflexible, not changing as business needs quickly change.*

Best Practice 1: Set Clear Expectations

Performance management typically begins with establishing goals which are intended to set expectations, align efforts with organizational intent, and provide motivation for the performer. When done well, goals do all these things.

ACTION STEP

Make sure all employees know what's expected of them via job descriptions and specific goals, where applicable. Goals should describe deliverables in a specific way, including what is to be delivered by when. Hold managers accountable for setting clear expectations with their employees, aligned with the goals and direction of the company. Some additional considerations in setting goals:

- *Even employees in more transactional positions can look for ways to improve. Goals for these employees can focus more on how work gets done and less on what gets done. The primary performance metrics for conduct – the "how dimension" – assess quality, efficiency, timeliness, and cost. Goals can also focus on secondary performance metrics such as knowledge sharing and providing team support. Managers should have the flexibility and authority to structure goals so they're most useful for the employee.*
- *Managers should involve employees in setting goals. Sometimes, a manager needs to be explicit and directive in setting expectations. But a high degree of motivation is more likely when the manager engages in meaningful dialogue about the needs of the team and the organization so that the employee comes to his/her own insight. The result is having employees understand how goal attainment benefits them, the team, and the organization. They will understand how achieving the goal will benefit them personally. Equally important, they will understand the impact of failing to meet expectations. Insight provides intrinsic motivation, enhances engagement and motivation for goal attainment.*
- *Goals should be attainable and have an appropriate amount of stretch for the employee. Goals will be demotivating if deemed unachievable. A goal that represents no challenge fails to motivate. Managers must understand each of their employees because the optimal amount of stretch will vary from employee to employee.*
- *Help employees break down goals into small chunks so they can see and feel a sense of progress and reduce the difficulty of tackling a large effort.*
- *Goals give managers a basis for providing feedback, reinforcement, recognition and, when needed, course correction. Managers have a responsibility to monitor progress and provide course correction when the employee gets off track.*
- *Adjust goals, as needed, to respond to changing business demands. Business is dynamic. Requirements change. Goals are sometimes outdated within a month of being written. If frequent conversations aren't occurring, the specifics of goals tend to be forgotten until it's time for the mid-year or, worse, end-of-year review. At that point, the manager is stuck because it doesn't make sense to evaluate obsolete goals set six months or a year ago.*

Best Practice 2: Equip and Hold Managers Accountable for Delivering Feedback and Coaching

Managers generally lack the skills to provide effective coaching and feedback. They lack the ability to clearly communicate their message, and they fear the employee's reaction in a difficult conversation. Often, performance coaching conversations are avoided. Understandably, employees dislike receiving feedback from an inept coach. It's rare to find manager who take the time and effort to practice feedback and coaching skills, but they won't develop the skills without practice. Performance coaching conversations are the cornerstone of effective performance management.

ACTION STEP

Provide training and development opportunities for your managers built around feedback and coaching skills and hold managers accountable for delivering frequent feedback to their teams. Below are some specific behaviors managers should practice to improve their ability to provide feedback and coaching:

- ***Provide compelling feedback.*** *Feedback follows behavior and informs the performer about the acceptability of the behavior. Feedback reinforces desired behavior or suggests changes that will enhance performance. To increase effectiveness, feedback should be:*
  - *Timely. There should be little or no delay between the performance and feedback.*
  - *Specific. Managers should not speak in generalities.*
  - *Delivered in a calm and genuine way. The manager's emotion will be contagious.*
  - *A balance of positive and constructive. Feedback about things done well serves as positive reinforcement of behavior. Managers should focus on the positive, take note of performers doing well, and provide frequent positive feedback.*
- ***Describe the impact of performance.*** *In addition to addressing specifics about performance, provide information about the effect the performance is having on the team and the organization. This helps the employee understand why the feedback is important.*
- ***Address obstacles to performance.*** *Ask the employee to describe what's proving challenging. Ensure the performance environment is conducive to performance and the employee has everything needed to perform to potential.*
- ***Demonstrate managerial courage.*** *Managers should know their employees well and adapt their approach to the individual employee. Course correction messages are sometimes difficult for the employee to receive, and employees vary in their sensitivity to the message. Some employees are sensitive to feedback and criticism. For others, subtle messages don't seem to get through. Adapt the approach to the employee and always treat the employee with respect and dignity.*
- ***Set an appropriate tone.*** *Keep the conversation constructive, objective, and focused on performance. Avoid referring to "you," e.g., "You did this…" or "You did that…" The purpose is not to attack the performer but to share information calmly and objectively and, through the use of questions, lead the performer to insight.*

Best Practice 3: Conduct Employee Performance Appraisals

Performance Appraisals should not be about the form a company uses, or a checklist that describes the process. The performance appraisal process should focus on driving meaningful conversations between managers and employees in order to help employees be successful.

ACTION STEP

Design and implement an appraisal process that focuses on meaningful conversations that provide feedback, positive reinforcement, and course correction to help employees be successful. Here are some additional tips to consider in your design:

- *Treat managers like responsible adults. Empower managers to manage. Hold managers accountable for setting goals, coaching, developing. At the same time, grant them a high degree of autonomy and flexibility.*
- *Recognize and promote managers who excel at informing, empathizing, coaching, providing course correction, exercising good judgment and demonstrating emotional intelligence.*
- *Provide job aids and technology judiciously to managers for the purpose of promoting meaningful conversations. Do not provide tools that limit managerial discretion and judgment.*
- *Embrace flexibility and simplicity. Steer clear of process rigidity and complexity.*
- *Evaluate the net value of the employee's contribution by considering three dimensions of performance: 1) Accomplishments – what's delivered of value; 2) Impact – how accomplishments are delivered and affect others; and 3) Effort – the difficulty of delivering accomplishments in the performance context. It's a gross violation of fairness when one employee receives a top evaluation for exceeding goals that were a walk in the park while another is penalized for failing to meet untenable goals that no one could have achieved.*
- *Avoid reducing performance to a single number. Rather than a rating value, consider providing information-rich feedback that will help employees improve. Focus on optimizing performance rather than on a minimum acceptable level of performance.*
- *If appraisals are going to be documented, the documentation should serve the employee. Many employees may value receiving notes from the manager related to major accomplishments and contributions. If employees add their own notes alongside the manager's, these documents can become running career histories of the contribution and growth of employees.*

Best Practice 4: Tie Pay to Performance

Tying pay to performance incentivizes employees to perform according to the expectations that have been set for their particular roles and helps to reward and motivate high performance.

ACTION STEP

If you don't currently adjust pay based on performance, update your compensation approach to connect the two. To optimize performance, consider the following when updating your approach to compensation:

- *Separate performance appraisals from compensation decisions and discussions by a considerable time interval of a month or more. When employees know they will be informed about compensation decisions (merit increases, for instance) during the performance appraisal, they will be in a state of anxiety and unable to focus on anything but compensation. Managers will tend to focus the conversation on justifying the comp decision instead of having a meaningful conversation that summarizes the employee's contributions and behaviors over the past year.*
- *Base variable comp on a combination of individual, team, and organizational performance. When variable compensation is based only on individual performance ratings, it can lead employees to operate too independently.*
- *Empower managers to make pay decisions following a budget and within reasonable guidelines. When pay decisions come from on high, it takes accountability away from managers and opens the door for them to tell employees that final pay decisions are "out of their hands". You want your managers to own their decisions so they can communicate them effectively and in their own words.*
- *Give managers authority and budget to grant spot bonuses throughout the year. This boosts motivation because it increases the proximity of a reward to the outstanding performance. Providing a portion of variable comp through spot bonuses during the year should more easily allow managers to reward truly outstanding performance.*
- *If you pay variable compensation for employees who develop new skills or competencies, make sure you are rewarding the application of the skill or competency, not just the acquisition.*

The implementation of goal setting, feedback and coaching, and performance appraisals can seem daunting. They can be difficult to get right. But, the potential impact on your organization in doing these things well is worth the effort. Remember, when done well, you can increase engagement, shape your culture, and optimize individual and organizational performance.

Ask Yourself: Questions for Reflection

Consider how these factors might impact your ability to Drive Accountability:

- *How well do you handle feedback and coaching conversations? Are you a good role model for these behaviors?*
- *Do you ask your managers about their employees, what they're working on, their overall performance, and their potential to learn and contribute even more?*
- *Do all of your employees know what their top priority is in any given day or week?*
- *Do all of your employees know what is expected of them?*
- *Do you have clarity on the performance levels of each of your direct reports and their teams?*

REFERENCES

The references below are helpful if you want to learn more about Driving Accountability:

Want to Shape Your Culture? Overhaul Performance Management
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ENGAGING TALENT

To have a successful business, we can't have employees who simply show up. We need them to perform, to achieve, and to deliver meaningful results. That's success in the context of the workplace. And that's a primary reason to have managers – they exist to help their people be successful.

Employee engagement describes the mindset of successful employees. That mindset leads engaged employees to:

1. ***Expend discretionary effort – they willingly work harder than they are required to work.***
2. ***Demonstrate loyalty to the firm – they defend and even promote the firm when away from the workplace.***
3. ***Align their efforts – they prioritize and direct their work to match what the business needs.***

WHY IS IT IMPORTANT?

Engagement drives virtually every business metric that matters: revenue, profit, customer loyalty, quality, and innovation. Increasing engagement will drive down tardiness, absenteeism, accidents, theft, and employee turnover. Engagement also drives retention. Engagement is a mindset in which employees feel a personal sense of ownership of business issues. That mindset then leads them to be loyal, to willingly work harder than they are required to work, to focus their work on what matters, and to stay with you.

Engagement drivers are largely in our control, but there are factors that affect engagement that are not in our direct control. Engagement is primarily driven by intrinsic motivators. However, there is a strong relationship between engagement health and business success. And it's not a simple, one-directional relationship.

The relationship between engagement and business success is a two-way causal loop. This is critical to understand. In one direction, engagement drives business success – as engagement increases, your business will benefit in every key performance indicator. Furthermore, as your business improves (especially as it grows), it naturally raises engagement. If your business is struggling in the marketplace, your work is cut out for you, but you also have all the more reason to focus on engagement. If you're winning in the marketplace, you'll find it much easier to drive engagement and reap the rewards.

WHERE DOES IT TYPICALLY GO WRONG?

Issues with engagement fall into a few categories:

- *Confusing engagement with satisfaction or happiness*
- *Lack of understanding or attention to the key drivers of engagement*

Best Practice 1: Distinguish between Engagement and Satisfaction

Engagement is often confused with satisfaction or happiness. They're not the same thing, and you can't assume that happy employees are engaged employees. They may simply be comfortable. Engaged employees are usually happy, but not always. Engagement is not about happiness or satisfaction. It is about ownership and a sense of responsibility.

It's nice to have happy employees, but it's enormously valuable to have truly engaged employees who are psychologically invested to the point of giving a remarkable level of discretionary effort that is aligned with business needs.

ACTION STEP

Measure engagement via a survey (available in the market) or gauge engagement based on feedback and observations from you and your managers. Here are some example statements that, to the extent an employee agrees, would indicate the likely degree of engagement:

- *My boss and I have frequent, meaningful conversations.*
- *I am never in doubt about what's expected of me at work.*
- *My opinions are heard and considered.*
- *My work provides me with plenty of opportunities to learn and grow in my career.*
- *I have the tools and resources I need to do my job well.*

Best Practice 2: Understand and Act Upon the Top Drivers of Engagement

An engagement driver is a lever that enables you to lift engagement. Here are the top drivers of engagement (not in order of importance):

1. Strategy Alignment
2. Trust in Senior Leaders
3. Peer Relationships
4. Job Fit
5. Learning Opportunities
6. Advancement Opportunities
7. Personal Influence
8. Recognition
9. Fairness of Rewards
10. Manager Relationship

Engagement Driver 1: Strategy Alignment

Leaders have a responsibility to frame the future for their employees via a clear strategy. A strategy is a high-level plan to create the future for the business. A good strategy paints a picture of the destination, a rationale for changing, and the major steps to get there. If employees don't know where you're going and don't have realistic expectations about the journey, you can't expect them to be engaged and expend effort to propel you in the right direction. When employees have clarity about the strategy, they will feel a sense of purpose.

Strategy Alignment starts at the top with the CEO and senior leadership team. Clarity and alignment often break down the farther down you go in the organization. Every leader, starting with the CEO, should be able to describe clearly the vision and strategy using clear-cut, consistent, vivid language that every employee can understand.

ACTION STEP

To align your strategy, answer the questions below for your company in a clear and succinct way. Discuss this with your managers, making sure they understand and can articulate these answers with their employees.

- *Why do customers buy from us?*
- *Specifically, how do we make money?*
- *How are we positioning ourselves in the competitive landscape today?*
- *Will we be positioning ourselves in a new way in the future (via new products, services, customer base, etc.)?*

Engagement Driver 2: Trust in Senior Leaders

Studies show that trust is associated with increased levels of engagement and reduced stress in the workplace. If leaders have done a masterful job of creating and communicating the business strategy, that's great. But they also need to back up their words with behaviors that demonstrate their integrity and ability to execute the strategy.

Trust has multiple dimensions. One dimension – and the easiest to address – is simply integrity. We expect leaders to be honest, to tell the truth. Once that trust is violated, it's incredibly difficult to get it back. You can't tolerate leaders who deceive or betray confidences. When employees feel deceived or betrayed, the impact on engagement is ruinous.

ACTION STEP

Use the tips below to establish trust in senior leaders or to repair trust issues, where needed.

- ***Create Familiarity.*** *It's important for employees to get to know your senior leaders in order to develop trust and confidence in them. Senior leaders should be heard sharing insights about the strategy and courageously answering challenging questions about the business. They should be seen stepping up to confront challenges and making tough decisions. Ensure exposure to senior leaders so that rank and file employees see how their leaders speak the truth, demonstrate personal integrity, and skillfully lead their teams.*
- ***Find Common Ground.*** *We're more likely to trust someone with whom we have things in common. It may not be necessary for leaders to be liked, but they'll be more effective and deemed trustworthy if they're likeable. Likeable leaders are those who are approachable, share on a personal level, and establish common ground with employees.*
- ***Relax.*** *Stress and threat are enemies of trust. The most effective and engaging leaders create a sense of urgency without introducing unnecessary threat. Leaders should work on letting go of their ego, relaxing, and becoming comfortable in their own skin. They will then be more approachable, avoid introducing unnecessary threat, and promote trust and engagement.*
- ***Show Vulnerability.*** *Here's one of the many paradoxes of leadership: People want to follow strong, confident, capable leaders. They also want to follow humans who are willing serve others and who show a degree of humility. Leaders must learn to show vulnerability, admit mistakes, and ask for help when needed.*

Engagement Driver 3: Peer Relationship

We are social animals and, from the moment of our birth, our brains instinctually drive us to make connections with others. Coworkers who like each other and care about each other are more likely to form high-functioning teams. Leaders who allow space for and promote personal connections will serve engagement.

ACTION STEP

Establish deeper relationships with your team and encourage positive relationships between team members. Get to know them on a more personal level by focusing on things you and team members have in common – shared values, common goals, even a common enemy, such as a key competitor in the market. Never view another team in your organization as a competitor or enemy.

Engagement Driver 4: Job Fit

We choose jobs the way we choose our clothes – because they suit us, they fit, they feel comfortable. A comfortable job is one that matches our aptitudes and personality preferences and takes advantage of competencies in which we're skilled. Playing to our strengths in these situations will make it unlikely that we will fail. This requires a balance, however. When we are too comfortable, we experience limited or no development and may quickly become bored. The best fitting job may be one that causes some discomfort. It challenges. It stretches. It has a reasonable chance of success without removing any possibility of failure.

ACTION STEP

Identify any job fit issues within your direct reports and ask your managers to do the same with their own teams. If you identify specific individuals with job fit issues, consider adding more challenging work to their responsibilities to stretch and re-engage them or, if possible, consider moving people between positions. Here are some questions for consideration:

- *Do you feel challenged? (Alternatively, do you feel bored?)*
- *Are there tasks or responsibilities that take up a large percentage of your time that aren't challenging or that drain you?*

Engagement Driver 5: Learning Opportunities

Acquiring the ability to do something new or to do something better is psychologically fulfilling and contributes to engagement. Proficiency is engaging. Conversely, repeated failure, unaccompanied by learning, leads to lapses in confidence. Carried to the extreme, this can lead to dysfunctional behaviors and disengagement. We learn most of what we need for success by working in a job that is appropriately challenging and provides opportunity to learn and master new skills. A job that provides little or no challenge and no opportunity for failure is not developmental and fails to engage.

ACTION STEP

Ask your managers to pay attention to whether or not their people have opportunities to learn new skills or new and more effective ways of working. As a company, you can provide resources to your employees so they can broaden their skill set and, therefore, their contributions to your company. Learning resources might include things like training, books or other written materials, shadowing someone with different expertise. As stated in the introduction, managers exist to help their people be successful. They have to pay attention to look for - and ask their employees to look for - opportunities to learn new skills.

Engagement Driver 6: Advancement Opportunities

An engaging career is more than an agreeable job and decent paycheck. An engaging career provides a sense of certainty about the future and represents long-term, continuous opportunity to stretch and develop.

ACTION STEP

Use the tips below to establish trust in senior leaders or to repair trust issues, where needed.

- ***Differentiate career paths.*** *For employees who have the potential to advance significantly beyond their current position, there are two primary career paths available: a specialist path and a generalist path. Specialists and generalists are developed differently and engaged differently. Specialists are most engaged by going deep and developing expertise. Generalists are more likely engaged by breadth of perspective and variety. Understanding the differences in career paths will enable you to develop, brand, and market these paths to your employees so they can make informed decisions and you can better meet your workforce planning needs.*
- ***Provide career guidance.*** *If you've developed an understanding of the career paths in your firm and how they serve your long-term business needs, you can creatively brand and describe them for employees. Create stories and short bios of successful employees in your organization who have navigated various career paths. Describe the nature of the work, challenges, plus development and experiences that lead to success in the career.*
- ***Set realistic expectations.*** *Advancing in a career is hard work. There's a price to be paid. Be wary of creating false expectations about advancement as you market career paths. Those who reach significant position levels have typically had careers marked by fits and starts, successes and failures, and have held jobs that weren't appealing. Help your early career emerging talent to have realistic expectations about what it takes to succeed in a career.*
- ***Deal with blockers.*** *If workforce demographics have created a gray ceiling in your firm because late-career employees are not moving on from key roles, you will disengage your top emerging talent and likely lose them to a firm that has more opportunities for career advancement. Dealing with blockers is not easy when, as is often the case, the incumbents are doing a satisfactory job and don't have a desire to move. The challenge is to provide a suitable alternate role for the incumbent and provide messaging that promotes fairness and is not perceived as a punishment.*
- ***Differentiate talent.*** *One of the most important contributors to effective talent management is the ability and willingness of the organization to differentiate talent and then follow up by applying differential treatment. Teach your managers how to differentiate talent and make sound decisions about developing and deploying talent. Failure to differentiate will result in your best talent fleeing your organization in search of a meritocracy that recognizes their out-sized contribution and that provides them suitable and stretching development opportunities. Failure to differentiate will result in disappointing many of those who stay on in an organization suffering the consequences of losing good talent. In the end, it is disheartening for all stakeholders because failure to differentiate results in a mediocre workforce.*

Engagement Driver 7: Personal Influence

All employees need to be heard, to feel that their opinions matter. The ability to influence effectively is a key leadership competency and developmental need for many. Listening to and thoughtfully considering the input of employees gives them a sense of personal influence and drives engagement. Sometimes, employees have off-the-wall ideas or naïve/unreasonable opinions, and managers find it easy to dismiss or ignore the input. Doing so risks missing out on brilliant ideas from employees and disengaging them in the bargain.

ACTION STEP

Focus on listening to your employees and actively seeking out their input on difficult challenges for which they might have a unique perspective. Often, employees on the front line have ideas about new and better ways to do the job, but are dismissed. Some don't bother to speak up at all because of a history of being dismissed. Coach your managers to listen and thoughtfully consider the ideas and opinions of their employees as a way to leverage this engagement driver.

Engagement Driver 8: Recognition

Recognition is one of the easiest ways to reinforce good performance and drive engagement.

ACTION STEP

Try out the tips below to improve the frequency of recognition. Often, managers focus on seeking out and/or pointing out what is wrong. They may need to shift their mindset, paying more attention to "catching" employees doing great work.

- ***Focus on intangibles.*** *Intangible reinforcement costs little or nothing. A sincere thank you, a pat on the back, or just a little attention can all be meaningful if it is specific and authentic.*
- ***Learn how to celebrate.*** *Learn how to celebrate and publicly recognize outstanding performance. For some leaders this is natural and done well. Others are awkward or engage in grandstanding and really make a mess of things. Keep the celebration focused on the individual or team, the accomplishment, and the impact it had on your organization.*

Engagement Driver 9: Fairness of Reward

Financial incentives drive engagement as long as they're dispensed fairly. If the distribution is perceived as unfair, it will damage engagement. To be an effective engagement driver, financial rewards should be commensurate with the contribution and perceived as fair when compared to the contribution of others in the organization.

ACTION STEP

Whenever possible, if not restricted by the terms of a labor contract, tie rewards to performance. Pay adjustments, bonuses, and other financial rewards should be clearly tied to some aspect of individual and/or company performance. The tie between rewards and performance should be clearly communicated to employees so they understand the connection and how such rewards are dispensed

Engagement Driver 10: Manager Relationship

Although listed last in this Top Ten List of engagement drivers, the relationship between employee and immediate manager is, by far and for almost every organization, the most powerful engagement driver. The immediate manager is the driving force behind all the other drivers. Engagement starts and ends with your management ranks.

ACTION STEP

Pay attention to the engagement drivers discussed above and discuss them with your managers. As a group, discuss opportunities for improvement and prioritize a few specific actions you can take to lift engagement. Some specific behaviors that are important for managers to exhibit are

- *Promoting trust in senior leadership rather than tearing it down. The immediate manager is a proxy for the senior leadership team. Employees often form an impression of senior management based on what they hear from their boss.*
- *Understanding and discussing employee development needs, having career conversations, and providing employees with opportunities to stretch and develop new skills and confidence*
- *Promoting positive peer relationships among team members*
- *Listening and respecting the input of employees to give them a sense of personal influence*
- *Recognizing and rewarding employees.*

Remember, there is nothing more important to drive engagement than to ensure you have operational managers who are skilled at leveraging the engagement drivers.

Ask Yourself: Questions for Reflection

Consider how these factors might be impacting engagement at your company:

- *Do your managers and employees come to you with questions or input?*
- *Do you get the impression that your employees are doing the bare minimum?*
- *Have you and your managers done a good job of building mutual trust and respect with employees?*
- *Do your employees understand their opportunities for learning and career growth?*
- *Do your managers have conversations with employees about their aspirations, their attitude toward work, and how their work contributes to the organization?*

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The references below are helpful if you want to learn more about Engaging Talent:

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