



Engage the Lion's Share of Top Talent before They're Endangered

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Participant Guide

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As a speaker, author & entrepreneur, Tracy Butz empowers others to create the life they want to live.

Engagement:

Choosing to commit _____ effort, time, and mental energy to actively and willingly contribute to an organization’s success, using their head, heart and hands.

Question:

In over 20 years of research with the Gallup Organization, Marcus Buckingham has reported which statistic regarding engagement of the US workforce:

- A. 45% is engaged, 29% is not engaged, and 26% is actively disengaged.
- B. 26% is engaged, 55% is not engaged, and 19% is actively disengaged.
- C. 63% is engaged, 26% is not engaged, and 11% is actively disengaged.
- D. 10% is engaged, 68% is not engaged, and 32% is actively disengaged.

Program Objectives:

1. Realize how an effective engagement strategy can greatly enhance culture, productivity and overall revenue growth of an organization.
2. Understand the importance of measuring the strength of an organization before implementing a solid strategy. By measuring the results each year, the impact of the efforts can be realized, ensuring that the organization continues to move in a positive direction.
3. Learn and apply the framework of a successful engagement strategy within teams and across the organization, also recognizing that when engagement issues arise, specific tactics can be used to work through and overcome them.

Directions:

Capture what traits you feel best describe an engaged employee.

Engagement is a personal _____, not something an organization can impose.

Employees will choose if, how, and when to expend their _____ energy.

Leaders play a critical and strategic role by creating the _____ of engagement.

10 Key Components of an Effective Engagement Strategy:

1. Trust and integrity
2. Job fit
3. Clear expectations
4. Alignment
5. Candid feedback
6. Culture
7. Relationship with supervisor
8. Professional development
9. Motivation and recognition
10. Growth opportunities



Workplace Strength Survey

- Job satisfaction
- Supervisor effectiveness
- Level of engagement
- Commitment to organization



The annual Workplace Strength Survey is designed to measure the strength of a workplace. It can be administered through a web-based tool and should be completely anonymous.

Instruct employees to select their Division and Supervisor from drop-down menus. They are to then read each question and select the response that indicates the extent to which they agree with the statements. Comment boxes are provided directly after each question to share their thoughts.

QUESTIONS BELOW APPLY TO OUR ORGANIZATION

1. OVERALL SATISFACTION - How satisfied are you with XXX as a place to work?
2. I have the essential resources and equipment necessary to successfully perform my job.
3. I feel my job/workload allows for the appropriate work/life balance.
4. Generally speaking, I like the kind of work I do.
5. One of the main reasons I remain with XXX is the lack of available alternatives.
6. I understand the goals of my division and/or department.
7. In my opinion, the majority of my coworkers are committed to doing quality work.
8. The majority of my coworkers are pleasant to work with.
9. This last year, I had opportunities at work to learn and grow.
10. I believe the actions of our Executive Leadership support our company's mission, vision and core principles.
11. I believe XXX company conducts business in an ethical manner.
12. I feel good about our company's future (*next 5 years*).
13. I have a friend at work with whom I can confide in and share personal matters.
14. I have a knowledgeable, friendly person to go to in my dept when I have questions about my work.
15. I speak of XXX company to my family and friends as a great organization to work for.
16. I would stay with XXX company even if offered a similar job elsewhere with better pay and benefits.
17. Our wellness programs encourage me to lead a healthy lifestyle and allow me opportunities to incorporate nutrition and exercise into my daily routine at work and/or home.

QUESTIONS BELOW APPLY TO YOUR DIRECT SUPERVISOR

18. I understand what is expected of me at work.
19. When I go above and beyond, it is recognized appropriately by my supervisor.
20. My supervisor cares about me as a person.
21. My supervisor encourages my professional development.
22. My supervisor models behavior consistent with our organization's core principles of honesty and integrity.
23. My supervisor displays an appropriate sense of humor.
24. Within the last six months, my supervisor has conducted either a mid-year and/or year-end review with me during which my performance was evaluated and candid feedback was provided.
25. I believe I work for a good supervisor.
26. With my supervisor, my opinion counts.
27. Add comments about what you feel is working well and what we should continue doing.
(*In your response, please indicate whether your comments apply to our organization or to your direct supervisor.*) - Only an open-ended comment box is provided.
28. Provide us with at least one idea on how XXX organization and/or your supervisor can improve.
(*In your response, indicate whether your comments apply to our organization or to your direct supervisor.*)
- Only an open-ended comment box is provided.

ENGAGEMENT STRATEGY

TRUST & INTEGRITY

- Top-down approach
- Clear, open & _____ actions
- Acting for what is right

JOB FIT

15 questions to help determine if you're in a job that combines:

- What you like to do
- What you do best
- What adds value



1. What are you best at doing?
2. What do you like to do the most?
3. What do you wish you were better at?
4. What talents do you have that you haven't developed?
5. Which of your skills are you most proud of?
6. What do others most often say are your greatest strengths?
7. What have you gotten better at?
8. What can you just not get better at no matter how hard you try?
9. What do you most dislike doing?
10. Which skills do you need to develop in order to perform your job?
11. What sort of people do you work best/worst with?
12. What sort of organizational culture brings out the best in you?
13. What were you doing when you were happiest in your work life?
14. What are your most cherished hopes for your future work life?
15. How could your time be better used in your job to add value to the organization?

CLEAR EXPECTATIONS

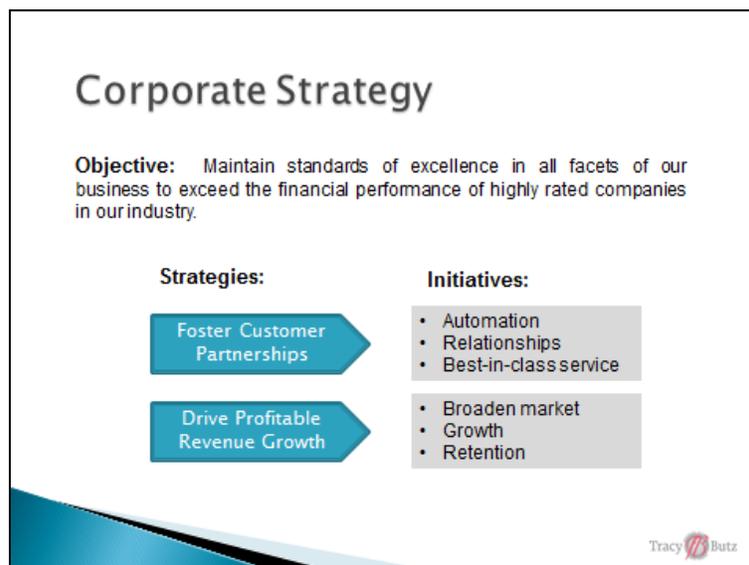
- Clear behavioral expectations
- _____ performance goals
- How to meet and exceed objectives

“People need to know where they stand. Failing to differentiate among employees and holding on to bottom-tier performers, is actually the cruelest form of management there is.”

~ Jack Welch,
one of our time's most celebrated business leaders

ALIGNMENT

- Understand team, department, and company goals.
- Realize alignment of personal _____ and company's success.



CANDID FEEDBACK

When engagement issues arise, learn how to effectively engage in open, meaningful dialogue in a way that maximizes candor and minimizes defensiveness.

Definition of Candor:

The state or quality of being frank, _____, and sincere in speech or expression. It requires both trust and safety.

Six Strategies:

1. Clearly identify your purpose for having the conversation, *before* engaging in it.
 - The other person's perception of your *intent* will influence his/her behavior during the discussion.
2. Consider the timing and location for the conversation.
 - Address matter quickly, privately and one-on-one.
3. Start with an opening statement that _____ dialogue.
 - "I'd like to see if we might reach a better understanding about "X". I really want to hear your thoughts and feelings about this and share my perspective as well."
4. Communicate the facts, your interpretation and then how you feel.
 - Focus on the specific issue and the behavior, rather than on the individual.
 - It is also very helpful to avoid using the word "you" when addressing the situation, as it can be taken personally or even viewed as a personal attack.
5. Encourage the other person to share his/her thoughts and feelings.
 - Ask clarifying questions to better ensure you understand his/her perspective.
 - Acknowledging the other person's point of view; carefully restating what was said.
6. Keep your _____ in control.
 - Prior to conversation—think through how it may go and how you've reacted in the past.
 - During the conversation—lower voice, listen more, take time to regain composure.
 - Correct situation if needed—apologize and correct misunderstanding, focusing on your intent.



CULTURE

Culture is described as: _____

Directions:

There are many things that influence organizational culture. With a partner, create a list of ideas of how culture is shaped.

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

A strong culture...

- Is a talent-attractor
- Is a talent-retainer
- Engages people
- Creates _____ energy
- Changes the view of “work”
- Creates greater synergy
- Cultivates success



RELATIONSHIP WITH SUPERVISOR

People don't leave companies; they usually leave supervisors.

- Treat your employees with respect and ensure they know you care about them and their performance.
- They want to know that the company's leaders care about them as people, not just as employees.

Activity:

With a partner, discuss and capture ways a supervisor can demonstrate that he/she cares to a direct report.

PROFESSIONAL DEVELOPMENT

- Know the _____ and goals of each direct report.
- Utilize an Individual Development Plan (IDP), encouraging stretch goals.
- Discuss progress and assistance needed.

“The secret to performance and satisfaction—at work, at school, and at home—is the deeply human need to direct our own lives, to learn and create new things, and to do better by ourselves and our world.”

~ Daniel Pink,
NY Times Best Selling Author & Motivation Guru

Individual Development Plan

By actively engaging in an Individual Development Plan (IDP) and successfully achieving the identified goals, you will be moving toward enhancing your career.

Outlined below is a three-phased approach to the IDP process, designed to be a collaborative effort between you and your supervisor. The intent of an IDP is to outline your future goals and career aspirations with applicable development and/or training opportunities.

Phase 1: Identify Future Goals & Career Aspirations

Give significant thought as to what direction your career should go in. After identifying various career goals and aspirations, you should discuss them with your supervisor. Common questions for you to consider include:

- What direction is my organization going and what will the organization need from me and/or others in the future?
- What are my goals over the next three years? *(This question is crucial to providing a motivational focus for everything the employee does.)*
- What are my greatest strengths and how can I build on them more effectively?
- Do I have any significant weaknesses that make it difficult to do my job or will prevent me from reaching my goals? Do others perceive me as having key weaknesses?

Phase 2: Target Specific Competencies/Skills

Work collaboratively with your supervisor to identify specific competencies/skills where you need further enrichment to achieve your goals. Candid conversations should be held regarding strengths, weaknesses/performance gaps, experience level, individual contributor versus leader of people focus, suggested coursework/designations/degree, etc.

Phase 3: Create an IDP

Complete an IDP using the organizational template noting S.M.A.R.T. goals (*specific, measurable, attainable, realistic and timely*). The supervisor is to review the IDP and suggest applicable development activities, discuss budget parameters, address any resource constraints, etc. You should then finalize the IDP and begin working to attain your identified goals. Additionally, it is recommended that you periodically check-in with your supervisor to review progress and identify any necessary changes.

Individual Development Plan

Employee: _____ Date: _____

Department: _____ Supervisor: _____

Instructions: List your desired career goals, ensuring they are S.M.A.R.T. (*specific, measurable, attainable, realistic, timely*). These goals should be future-oriented, targeting attainment in one to three years.

GOAL #1	
Strengths:	
Challenges:	
Development Activities:	Target Date:
Success Indicators:	Completed (y/n)

Effective Development Activities

Development activities come in many forms, such as: stretch assignments, mentoring relationship, classroom training, project team involvement, individual learning, formal education, involvement in professional organization, volunteering, etc. Below are factors to consider when selecting relevant activities to produce desired outcomes. An activity is developmental when:

- 1. *Success and failure are both possible and will be obvious to others***
Example: leading a project team, teaching a course
Outcome: visibility will indicate how things went
- 2. *It requires assertive, individual leadership***
Example: designing a program, organizing or facilitating a company function
Outcome: better understanding of vision for change, focus on expectations & learning quickly
- 3. *It involves working with new people, many people or both***
Example: teams working on a pressing company problem
Outcome: development accelerates from working with unusual groups, cross-functional teams or members who might challenge you or your opinions
- 4. *It creates additional personal pressure***
Example: assign a project with tight deadlines, serve on an outside Board
Outcome: creates tension between where someone is versus where he/she would like
- 5. *It requires influencing people, activities, and factors over which the Coach has no direct authority or control***
Example: influence peers, outside parties
Outcome: may have to exert impact and influence where it may not be comfortable
- 6. *It involves high variety***
Example: lead a team where you don't have technical expertise, build a new team
Outcome: working at a hectic pace and coping with variety, change and new situations
- 7. *You will be watched closely by people who are in various types of leadership roles***
Example: manage a team with a high profile situation/problem
Outcome: things are being closely watched which adds even more pressure
- 8. *It requires building a team, starting something from scratch or fixing a team/process/project in trouble***
Example: last person who tried it failed, resolve heavy conflict between team members
Outcome: these challenges require a broad array of management skills, especially resourcefulness
- 9. *It has a major strategic component and is intellectually challenging***
Example: present a proposal on a high level, possibly even a controversial topic to the ET
Outcome: strengthens strategic business sense and forces one to deal with "big picture" visions
- 10. *It involves interacting with various supervisors – good coaches and poor coaches***
Example: work on something you dislike doing with a new person as your Coach
Outcome: working with a variety of coaches enables you to learn what or what not to do

MOTIVATION & RECOGNITION

- Be sure your manager knows what motivates you and how you like to be recognized.
- Recognition should be _____, timely and genuine.
- Have a reward structure built around intrinsic motivators (*personal pride, satisfaction of doing well, feel you can make a difference, they are part of something important, because the activity matters, it is interesting, etc.*)

Activity:

With a partner, brainstorm rewards that have an intrinsic motivation and capture them below.

_____	_____
_____	_____
_____	_____
_____	_____

GROWTH OPPORTUNITIES

Having growth opportunities available and employees understanding what skills they need in order to be considered for that next role is key, especially for top performing talent.

- Leadership development programs
- High-potential programs
- Supervisory skill enhancement
- _____ project work
- Targeted training sessions
- Job rotation
- _____ program
- Job shadowing
- Technical classes
- Designations or certifications
- Board involvement
- Books, magazines, periodicals

RECOGNITION WISH LIST

Directions: This form is used to enhance recognition and appreciation of employees. Please only note the information you are comfortable sharing. Thank you.

ALL ABOUT ME

Name: _____

Birthday (*month/day*): _____

Company Anniversary: _____

IMPORTANT INDIVIDUALS TO ME

Spouse: _____

Significant Other: _____

Children (names/ages): _____

Pets: _____

IMPORTANT THINGS TO ME

Hobbies or favorite things to do when not at work: _____

Favorite restaurants: _____

Favorite types of music/musicians: _____

Favorite sporting events: _____

MY PREFERENCES

If I am rewarded, I would like it to be: _____
(*Ex: Time off, flex time, bonus, dinner, movie tickets, massage, parking spot, gift certificate for X, etc.*)

If I am recognized, I would like it to be handled: _____
(*Ex: Privately, departmental meeting, corporate newsletter, etc.*)



Speaker Biography

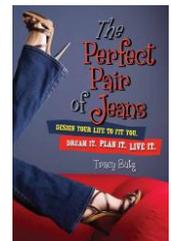
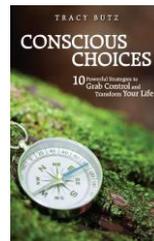
Tracy Butz is a devoted wife, an energetic mom of three adventurous young men, a successful entrepreneur, a captivating author and a true inspiration to many. Whether it is for an audience of 6, 60 or 600+, she is the Speaker of Choice who has inspired thousands of individuals to “Create the Life You Want to Live.”

As a highly sought-after speaker, Tracy has delivered powerful, life-changing messages, encouraging her audiences to identify what is most important to them and focusing their decisions in that direction, creating a positive difference in their work, families and communities. She is well known for her captivating and dynamic delivery, where audiences can be found sitting on the edge of their seats, laughing aloud and brushing away tears as she masterfully recounts each story, aligned with a key point, an impactful meaning, and an enduring message.



Tracy's experience actively engaging both large and small size audiences, includes clients such as the US Army, McCain Foods, Miles Kimball, Kimberly-Clark, American Trust Savings Bank, 4imprint, Plexus, Great Northern Corporation, Women's Leadership Network, Motorola, Festival Foods and Subway Restaurants, just to name a few.

Tracy is also the proud author of three books, all published since December 2010! “*Conscious Choices: 10 Powerful Strategies to Grab Control and Transform Your Life*” will help you discover insightful ways to overcome obstacles, make better decisions, and view setbacks with a new perspective. “*The Perfect Pair of Jeans: Design Your Life to Fit You*” will guide you on how to become the architect for your life, so that you create and live your plan that is aligned with what is most important to you, rather than letting life happen to you by default. Lastly, “Monday's Motivational Message” is a Mini-buk™ uniquely created to inspire you with a short, weekly motivational insight to jump-start your week in a positive way.



Beyond speaking and writing, Tracy also has significant experience in an organizational development environment, including ten years as Director of Learning and Development for a regional mutual insurance company, leading the company's training and organizational development initiatives. Known for consistently earning stellar performance accolades, Tracy is skilled in the areas of leadership development, performance management, engaging in difficult conversations, employee engagement and development, navigating change, and interpersonal communication, to name a few.

Tracy loves life and is continually challenging herself to share her talents, message and inspiration with others. She is poised to provide solutions for your organization's needs. Tracy truly delivers the tools for today's world, propelling her audiences to live more productive, passionate and purposeful lives.