# TAKING ACTION EVERY DAY FOR EQUITY & INCLUSION

A How-To-Guide to Uncover Your Teams Needs & Actions that Get Results







#### WELCOME!

You've signed up to receive this guide because:

- Your team is struggling with low productivity and morale
- You feel lost on how to solve your retention and turnover issues
- You are ready to take action to improve equity and inclusion on your team

But what is going to make a difference?

How do you know what will work for your team instead of just generic advice?

In this guide, we'll show you how you can leverage your culture survey (also called an employee engagement or pulse survey) to hear what your team wants and then take impactful action.

There's a wealth of data about your team's needs and wants in your culture survey! (also known as an employee engagement survey)

Your engagement survey can be the gateway towards a healthier, happier team. But staring at that data, you might just feel overwhelmed and not sure how to proceed. I want you to feel confident to take action that will get results.



#### What's Inside:

- Why your Culture Survey is a great source of information and how to get access to the results
- Targeting the most important questions or topics based on your role in the company
- Getting to the story behind the data so you know what your team wants
- How to TAKE ACTION that illustrates to your team and company that you're making improvements



#### **This Guide is for:**



### When to use this guide:

- HR & Talent Leaders
- Executives & VPs
- Managers

- After receiving your results from the latest employee engagement survey
- Before crafting your response plan and allocating resources for engagement





#### **MEET KATIE!**

I've been there...

After more than ten years in technology startups in various sectors — healthcare, retail, hospitality, legal, enterprise solutions — I have seen how difficult it can be to balance business results and the needs of your employees.

Through building and delivering new hire training, executing change management plans, integrating an acquisition, and coaching managers & agents, I have been in the trenches — alongside executives and talent leaders like you — working to drive outcomes and transform behavior to align with your values and goals.







Want to know what engagement survey I recommend?
Reach out to me at mclaughlinmethod@gmail.com

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How to Get Access to the Data





Engagement Surveys are also frequently called Culture Surveys. These surveys are typically owned and administered by the Talent or HR teams.

What's awesome about these surveys: they are not just a measurement of how engaged your employees are, but a measurement on how supportive your culture is to their growth, productivity, and motivation.

The surveys are completed by a high percentage of your employees. Meaning: you're getting their direct feedback on what they want and need. That's why these surveys are a perfect insight into the actions you can take to show your team you are listening.

Engagement surveys are a goldmine of your team's thoughts and feelings about how they're treated at your company. Take the opportunity to leverage these surveys to help your team members to feel more engaged and supported.



The data can be used to influence your strategies on:

- Executive Development
- Leadership / Manager Development
- Diversity
- Equity
- Inclusion
- Learning & Professional Development
- Career Pathing
- Team Dynamics
- Change Management
- Rewards, Promotions, & Team Structures
- Internal Communications & Transparency

Rarely do I see companies effectively leveraging this data to make actionable changes in their businesses.

#### Why is that?

If you're in the Talent world, you're probably dedicating the majority of your day to the employee or candidate experience. Your efforts to create equity, diversity, and inclusion in your company are tireless.

Sometimes the results of the survey can be really frustrating. And disheartening. After all your hard work, your scores may have only minimal improvements at best.

Especially after a pandemic full of crisis, and isolation.

But you can't fix what you don't know about.



Now, these scores are not solely the responsibility of the Talent team to fix or influence.

It is time for managers, directors, VPs, Executives to all get in on the review of engagement survey scores. Entire sections are devoted to both executive leadership and the manager-employee relationship.

That's likely why you are here!

Have you ever felt like you have a really solid pulse on your team and what they think or feel about your company, your leadership, your culture? If so, you might be tempted to postpone or cancel running a survey.

When you cancel or postpone, you're missing out on giving your team a chance to speak up about their experience. This feedback is essential -- especially when you are eager to show your team that you are listening to them.

Before you postpone that engagement survey again, I want you to really consider how helpful this data would be to you and the rest of your leadership.

Advocate for these surveys -- whether you're in talent, the executive team, or a manager. This data can be incredibly revealing, and the roadmap it provides is invaluable for all leaders.

The key thing to remember: the results are truly anonymous. This data isn't about trying to figure out who answered what question in what way. It is about seeing your results in aggregate so you can make changes that impact your entire team, department, and company.







#### How to Get Access to the Data

Getting access to your data is as simple as asking for it!

Ask your Talent team or executive to share the scores with you. Let them know that you're interested in learning more, and you want to partner with them to improve your scores.

If you are a manager, you can expect to see your team's results. You may be given your scores for a specific topic, but I encourage you to ask for access to the scores for individual questions. In a later section in this guide, I'll show you how to look at the answers to these questions and interpret what they mean.

If you are an executive or VP, you can expect to receive results for all the teams that roll up to you. It's best if you can look at the results divided by department and even specific managers. This can help you understand the variances by leader and gives you other insights to look into that might be influencing the scores.

It is appropriate to ask the Talent team for how the company as a whole responded to the survey. Then you can compare your results to the company overall. There's likely ways that you can learn from other departments or leaders after seeing these comparisons.

Now that you have your results, are you mentally and emotionally prepared to review the results?





You're reading this guide because you want to improve your team's experience working for you or your company. To do that, you need to look honestly at the culture survey results to see what your team is telling you they need. In this section, we break down the key ways you can leverage these surveys whether you are an executive, manager, or Talent leader.





Scores can help executives to determine what departments are struggling. Your talent team can provide you your data segmented by department and even by tenure of your team. This can help you round out your understanding of an underperforming team.

Perhaps their performance issues are less about the tools they have access to and more about team dynamics that are stunting their motivation and innovation capacity.

There's also typically questions directly related to how executives communicate vision and strategy. These questions help you know how you can continue to improve how you communicate, inspire, and motivate your entire company.

There are 3 big topics that Executives should look for in engagement surveys:

- How the Executives (or Senior Leaders) lead the organization
- General Culture of the Organization
- Opportunity & Working at the Company

Here are some example questions that you might see in your survey that you'd want to focus on:

#### **How Executives Lead:**

- Senior level management is open to new ideas and suggestions
- I have confidence in the fairness of senior level management.
- Employees can believe what they hear from senior level management.
- Senior level management is aware of the problems at my level of the organization.
- Senior level management trusts employees to do their job.





#### General Culture of Organization:

- Employees are proud to belong to this organization.
- I would recommend that a friend seek employment with the company.
- I look forward to coming to work each day.

#### Opportunity & Working at the Company:

- Working in this organization has allowed me to progress toward my career goals.
- People in this organization are held accountable for producing quality work.
- Decisions are made at the levels in this organization where the most adequate and accurate information is available.
- I know what's expected of me at work.
- I have opportunities to learn and grow.
- I know how my company measures success.
- My company helps me navigate change.





Your talent team can give you access to your scores on critical questions like "My manager supports me" or "I get clear feedback from my manager on a regular basis".

Where you see lower scores, that's where you need to make some improvements in how you are connecting with and relating to your team.

You might feel like you're doing a lot to support your team or give frequent, clear feedback. Just because you feel like you're doing it doesn't mean that your team feels that way. And that's what's key. In your relationship with your employees, it's not about you. It is about them. Using these engagement survey scores as a guiding light, so you can listen better to your team. You can adapt your leadership based on this data. Consider it your manager scorecard.

#### **Examples:**

- My supervisor demonstrates honesty and integrity
- My supervisor helps me find solutions to problems
- My supervisor respects employees as individuals
- My supervisor clearly communicates performance expectations
- My supervisor gives me open and honest feedback on my performance
- My supervisor trusts employees to do their job

#### Also pay attention to any questions that relate to:

- Team dynamics
- Respect for people's identities
- Equity and opportunity to use their skills or contribute ideas





It doesn't matter your role in HR or Talent, there's data in the culture survey you can leverage.

If you run the department or an area within Talent, you're likely to use the data to direct your strategy and influence your culture initiatives. Don't miss out on the opportunity to adjust your budget. Learn more about how we think about your people and culture budget in this blog.

The questions you can most directly impact speak to training, equity, diversity, inclusion, and belonging.

#### Examples:

- Human Resources policies are administered fairly and consistently.
- My company supports a diverse workforce.
- I feel valued for who I am as a person.
- My company sets the expectation for inclusion by embedding it in every day interactions.
- The training I have received has been sufficient for me to perform well in my job.
- I am able to effectively balance my job requirements and other parts of my life.







Paying attention to the categories valuable for managers and executives lets you influence other strategies. Here are some examples of how these categories map to strategies that you might implement.

Category of Questions	Possible Initiatives
How Executives Lead	Executive Development and Coaching
Manager or Supervisor	Leadership Development  Manager Training & Coaching  Team Building & Interventions
General Culture of Organization	Internal Communications & Transparency
Opportunity & Working at the Company	Change Management Training initiatives Career pathing Equity Process Improvement Organizational Development Rewards, Promotions, & Team Structures

Now that you know what questions to look for, keep reading for our step by step process to understand what these scores are telling you.

### Getting to the Story Behind the Data







We are frequently looking for these survey results to tell us what we did well. But the best nuggets of value come from realizing where improvements need to be made.

Here are the steps that I take to interpret employee engagement survey data to determine how we can make global or targeted improvements.

**Step 1** -- Reverse the statement and data. Instead of "I have" look at "I don't have". Doing this helps you to see what percentage of your organization is unhappy or dissatisfied in this area.

**Step 2** -- Create an "I want" statement to translate this "I don't have" statement into an expression of what your team is telling you they want.



### Getting to the Story Behind the Data

**Step 3** -- Consider how much this negative experience impacts a team member's likelihood to stay at your company (Their ratings are telling you that they are unhappy with something and if this festers, they will become actively disengaged or leave your company.)

**Step 4** -- Review this data point across your teams & departments to determine if you need an org-wide or department-level intervention. If the numbers are even across your organization, then make an org-wide strategy. If the numbers are starkly lower in particular departments from the org average, then form an intensive strategy for those departments.

Step 5 -- Consider how long this has been a problem of this size.

**Step 6** -- Create your strategy to give your team members what they are asking for. The entire reason that you do these surveys shouldn't just be about making you feel good about your work. These surveys can be a direct driver of your actions, your budget, and your programming.

Now let's look at some publicly available engagement score data to see this in action.

Let's imagine that these are your company's engagement survey results. Here's the example question:

I have the opportunity to give input on decisions affecting my work. 63% (only 1% increase from the previous year.)





Now let's look at some publicly available engagement score data to see this in action. Let's imagine that these are your company's results.

I have the opportunity to give input on decisions affecting my work. 63% (only 1% increase from previous year).

So here's what we know using our steps to analyze the results:

**Step 1 + Step 5:** For two years running, 37% of employees feel they don't have the opportunity to give input on decisions affecting their work. That is more than a  $\frac{1}{3}$  of employees.

**Step 2:** 37% of employees say "I want to give input on decisions affecting my work"

Step 3: This question speaks to autonomy and perspectives on the direction that their work takes. When employees feel involved in their work and decision-making process, they feel part of the company, part of the decision, and their buy-in is higher. This is especially key when decisions need to get made that are unfavorable for your team. When involved in the decision, allowed to give input on the decision, and understanding the why behind the ultimate decision, employees feel more engaged. When employees aren't involved in decision making, they can feel like their voice isn't important, they feel stifled, and will stop offering input on the goings on at work. This creates potential for employees to not report issues or errors that they see and not speak up about their needs. They'll quietly do their jobs and start looking for a new job where they feel better appreciated and involved in their work.





Step 4 + 5: Because of the length of time that this has been an issue, it's time to take action organization-wide. Key things to consider as you form your response strategy: where are decisions made? How does the decision process involve the people who are impacted by these decisions? Consider creating focus groups, feedback portals, and listening sessions. This question speaks to whether your team has the opportunity to give input. This doesn't mean they always want to engage. The feeling created in your company right now is that decisions are made behind closed doors.

Now you might say -- we have avenues for feedback and no one participates. Then my response back to you is that your employees are telling you that they don't all know about these opportunities.

When we do our work, we're largely overly saturated with information about the processes and how we do our work. But others across the organization barely get to see the work that you do.

**Step 6:** Create opportunities for employees to give feedback and input on decisions. (Or improve existing opportunities.)





If you already have focus groups, feedback portals, listening sessions, and more, it's time to consider: how effective are these? Do we need a communication campaign to ensure people know about these opportunities?

Lastly, don't forget the impact of informal input opportunities on this overall score. Your managers play an important role in each employee's perspective on the organization. Create a coaching mechanism for managers on how to create open opportunities to provide input. Set up a feedback loop where you bring managers together and ask them for what their team is saying about specific decisions.







Your final step is to now take action!

Before you take action in responding, learn the ways that others have botched their response to seeing their engagement survey data.

We'll also break down tactical ways to use survey data in a change management initiative.

#### 3 Big Ways Your Responses to an Engagement Survey Fail:

- Making Big Sweeping Promises and Not Following Through
- Assuming you have to Take Giant Actions to Respond
- Taking Action, but Not Sharing those Efforts





### Mistake #1: Making Big Sweeping Promises and Not Following Through

At a startup, it is common to have big lofty goals. Dreaming big is rarely a problem for you. You know that as a leader, you must share the vision and the dream with your employees of what your company could be.

Most engagement initiatives deployed by startups fall in these categories:

- Leadership Development
- Manager Training
- Diversity, Equity, Inclusion
- Professional Development opportunities
- Wellness programs
- Team Building or Bonding

Working on initiatives like these is an exciting time for your company. It shows you're making big strides! More developed companies have clearly defined programs for each of these initiatives. You're so excited about this milestone and the program you're launching, so you'll likely share it at your next company All Hands meeting.

#### Once you share it, be prepared to act on it.

As a former employee at startups like yours, these all hands meetings -- and especially announcements like rolling out an initiative like these -- always gave me a boost in energy. I love working for a company that devotes time, energy, and resources into keeping people happy, motivated, and successful.

See what happened?





#### Mistake #1:

**Making Big Sweeping Promises and Not Following Through** 

Just from hearing the announcement of the initiative at the All Hands, I assumed that the company (1) cared about me being happy & motivated, (2) wanted me to be successful as an employee, (3) will spend money, time, and energy implementing these programs. This is great, right? Yes and no. Yes, because you want your team to feel this from your company. Wha might not be great is the future let down if I (and your employees) don't see action.

If you announce a larger initiative like these, make sure you've got a plan to take action and follow through with that program. Announcing the program will help build confidence and engagement with your team. But if the team never sees action taken, they will start to question any proclamation made from the Talent team or Executives. That will hurt you the most. You'll have to work even harder to get your employees to trust what you promise them.

When your team doubts your leadership or follow through, you'll take a big hit all over your engagement survey.

#### Questions to Consider to Avoid Mistake #1:

- Who does this initiative impact?
- How long does it take to roll out? Could it be done in an iterative way to get small wins?
- When will employees see evidence of these initiatives?
- What examples can be shared with the team to show progress?





### Mistake #2: Assuming you have to Take Giant Actions to Respond

Let's revisit our list of common initiatives that come out of engagement surveys:

- Leadership Development
- Manager Training
- Diversity, Equity, Inclusion
- Professional Development opportunities
- Wellness programs
- Team Building or Bonding

These aren't small initiatives -- typically, they're org-wide and really sweeping initiatives that could take months to roll out. Especially at a startup, you probably need to invest in all of these areas. Your "checklist" for employee engagement, culture, and people initiatives is always growing.

#### Employee Engagement is not about completing a checklist.

Engaged employees feel appreciated, feel like they belong as part of a team, and feel like they can use their unique gifts within their jobs and workplace. Engaged employees put in the hard work, share innovative ideas, and speak up when errors happen.

So how do we get these results without a big initiative?

To go big, you must start small.





### Mistake #2: Assuming you have to Take Giant Actions to Respond

Let's take a look at the most common initiative that comes out of an engagement survey response: a diversity initiative. Most companies start to look at the demographics of their current team and look at their hiring practices to increase "diversity hires". Sure, to move from "less diverse" to "more diverse," takes a strategic plan. But if you only focus on the number of "diversity hires" you have, you're missing the entire point.

Think about the outcomes you want. All actions drive outcomes -- many times, there are unintended outcomes from the actions you take. Focus on the wrong outcomes, take the wrong actions: get wrong results.

On the next two pages, I've outlined two ways you might tackle the "Diversity, Equity, Inclusion" initiative. Watch out for the outcomes set, the actions taken, and what results are achieved.

#### Example A:

You focus on this outcome: increase the number of diversity hires by 15% by the end of next quarter.

You're likely to give your Talent and recruiting team the following actions to complete:

- Review extra resumes for underrepresented populations
- Aim to have 2 candidates from underrepresented populations make it to final round interviews
- Perform outreach or recruitment efforts to schools, programs, etc. that focus on traditionally underrepresented populations





#### Mistake #2:

#### **Assuming you have to Take Giant Actions to Respond**

Let's say that your actions above get you to the "result" of completing your goal -- and you now have 15% more "diversity hires" working at your company. You're probably ready to pat yourself on the back. Not so fast.

Let's take a look at the possible unintended results from approaching your goals this way:

- Managers don't have any context for why your recruiting team was pushing to advance candidates the manager didn't like.
- Managers may not agree with your decisions to bring in a new hire and has an attitude when interacting with them. They may even assume the new hire needs to work harder to "prove" themselves, which leads to feeling ostracized or like there's a glass ceiling they can't move past.
- Your team (including leadership and managers) doesn't have skills to integrate different ideas or backgrounds into their work or team.
- Your new hires don't feel included as part of the team.
- Your new hires don't have any role models that look like them.
- The tenure for your hires from underrepresented classes have a lower tenure and turnover more quickly than the rest of your team.

#### Not so great, huh?

In the next example, I'll show you how you could **shift your actions** to achieve the original outcome/goal of increasing diversity, while also proactively building an equitable and inclusive team

#### **Example B:**

You focus on this outcome: building a culture where diverse ideas and perspectives are encouraged and appreciated. Measured by: increased engagement scores on specific questions / sections of your engagement survey.





#### Mistake #2:

**Assuming you have to Take Giant Actions to Respond** 

Focus on the following actions:

- Design & deliver interactive diversity, equity and inclusion training for all team members
- Provide interactive/experiential training for managers to practice behavioral based questions when interviewing & coaching team members
- Monitor employee productivity using data
  - This looks like a periodic review of team KPIs, attendance, etc. You could come up with your own rubric for engaged productivity from data relevant to each team.
- Check in with team members on structured cadence to track engaged + disengaged behaviors (typically through an Talent business partner)
- Communicate regularly with managers about team dynamics
- Monitor awards, bonuses, promotions, recognition given to ensure there is not a specific bias towards one kind of behavior or demographic
- Validate team meetings are more inclusive & open ideas are shared through unannounced check ins
- And many, many more!

Performing actions like these improves everyone's experience in the workplace.

 $\frac{Result}{?} \ Your \ company \ culture \ supports \ people \ of \ all \ backgrounds \ and \ abilities.$ 

Is this slightly more difficult to measure? Sure. But you don't get the unintended results of higher turnover on certain teams or relationship issues that decrease productivity and increase errors.

If you're a numbers person, watch your own desire for "easy to measure" actions versus the actions that will get a larger impact and results you want to achieve.





### Mistake #3: Taking Action, But Not Sharing those Efforts

Now that you know what you want to take action on, what does your communication plan look like for sharing your efforts? Don't have one? You're not alone.

If you've ever done the first big fail -- made a large announcement and then haven't followed through -- you're probably still feeling the sting of letting your team down. It isn't fun... So that means just do some things in the background and by osmosis your team will notice? Nope!

You are likely taking strides everyday to improve the employee experience. Start by making a list.

Write down every small thing that you, your Talent team, your managers, and your Executives do to create a culture and atmosphere that is happy, positive, and rewarding.

Do any of those actions line up with the "big initiatives" you're running? Or low-scoring areas on your survey?

Then talk about them.





#### Mistake #3:

**Taking Action, But Not Sharing those Efforts** 

#### Communicate. Communicate. Communicate.

Your people are busy. They've likely missed the email, slack message, or got distracted during the All Hands where you gave an update.

Tell them how your actions connect to engagement & culture.

YOU are in these initiatives every day. Taking action every day to engage employees. But your entire company is not. You have to be the advocate for your initiatives. Keep talking about them. Give specifics. Remind people that they have resources.

We all get so bogged down in the day to day of our jobs and our lives. It's easy to overlook something shared in a communication once. Repetition is the easiest tool for memory retention. The more that people see evidence of your actions, the more your engagement scores will go up.

Take action. Get results. Talk about the results.





### Optimize Your Culture Survey Response by Avoiding These Mistakes

#### • Making Big Sweeping Promises and Not Following Through

- Big Problem: Empty promises tank engagement.
- Quick Solution: Make a plan for taking action on your initiative before announcing your initiative. Then you'll know what you need to do next to show your team that you're working on it!

#### Assuming you have to Take Giant Actions to Respond

- Big Problem: Your initiative takes way too long to get any results.
   Plus, focus on the wrong outcomes, you'll get the wrong results.
- Quick Solution: Zero in on the true outcome for engagement improvements that last. Take small, deliberate, consistent actions towards that goal.

#### Taking Action, but Not Sharing those Efforts

- Big Problem: No one knows you're working on it & engagement continues to tank.
- Quick Solution: Communicate, Communicate!
   Be the advocate for your initiatives.

# How to Use Survey Data for Change Management







### How to Use Survey Data for Change Management

Elements of the Engagement or Culture Survey when leveraged correctly bolster change management strategies. First, identify insights from survey data. Then, incorporate into messaging and training for leaders, change agents, and more. Important! Remain tactful when sharing scores and avoid accusatory language. We all have the opportunity to change and continue to be intentional in our behavior with others in the workplace.





#### **High Scoring Items:**



Use to reinforce a message or behavior through change management strategies + messaging. Keep boosting and reinforcing the behaviors that you want to see within your teams. These items show you where your team has beliefs that you want them to keep and know you see these beliefs as valuable.

Example High Scoring Survey  Questions	Example Application Strategies for Leaders
<ul> <li>My manager keeps me informed about what is happening at &lt;<company>&gt;</company></li> <li>My manager genuinely cares about my wellbeing</li> <li>I'm excited for the value that change could add</li> <li>As our business grows, I believe change is going to be required</li> </ul>	Use as language prompts in team meetings or one-on-ones  • "you know how much I try to keep you informed about things happening here within the organization"  • "Our team has always impressed me with its willingness to change. Thank you!"





# How to Use Survey Data for Change Management



#### **Low Scoring Items:**

Support the need for effective change management and give a guiding light for where impact needs are. Directly address with messaging, training, and support.

### Example Low Scoring Survey Questions

### Other departments at <<company>> collaborate well with us to get the job done

- Most people here make a good effort to consult other colleagues where appropriate
- When it is clear that someone is not delivering in their role we do something about it
- The information I need to do my job effectively is readily available
- Most of the systems and processes here support us getting our work done effectively

### Example Application Strategies for Leaders

Highlight new evidence and behaviors that show the organization and leadership are already making changes to improve in these areas.

- "During X project, we worked with people from these different departments to collaborate and more sure that we did the right thing."
- Be willing to admit a past failure and show evidence of improvement / change.
- "We know that we haven't always been the most forthcoming with information. Here's how we are going to change that going forward..."



### Work with Us For More Support

Transforming your team connections & building inclusive behaviors using theatre.



#### JUMPSTART ENGAGEMENT PACKAGE

Get expert support and coaching to analyze your engagement survey data to make <u>real change</u> in your organization. Package includes: data analysis, strategic action plan report, one-on-ones with three executives, combined strategy session.

<u>Results</u>: Learn why your current initiatives aren't making a dent in engagement scores. Get clear strategies on how your executives can impact engagement every day.





#### **TEAM HEALTH RE-BUILDING WORKSHOPS**

Have fun with your team again while going deeper to address root cause issues that keep your team stuck. Rebuild trust after conflict, change, and sustained stress, through empathy-driven theatre techniques. Co-create resolution and inclusive spaces.

<u>Results</u>: 80% feel more supported and comfortable with the group, 93% feel valued by their company, 87% felt empathy for others





#### **ONE-ON-ONE COACHING**

Improve how you interact with your team, peers, and leaders and learn how expectations, assumptions, and bias drive your interactions. Rehearse for real workplace scenarios. Build empathy and emotional intelligence skills for lasting improvements in all your relationships at work.

Results: increased confidence, immediate application of new skills





### EXECUTIVE GROUP COACHING AND CULTURE CONSULTING

Led by an expert who understands the unique mix of urgency, agility, and high quality performance you desire for your team. Over 4-6 months, your entire executive team works on improving the same set of skills. Combine your learnings on DEI skills, people outcomes, and culture improvements into a Culture Contribution Plan to drive sustained behavior change throughout your organization. Includes 10 group coaching sessions, 2 one-on-one coaching sessions per exec, and implementation support to ensure you realize the return on your investment.

