

# engage

## Welcome to Engage.

There are 3 steps to rolling out Engage and securing adoption in your organisations - this is a guide to successfully do that.

Best of Luck.... Ready, Set, Engage

### Ready - Engage is coming...

Communication - to ensure Engage is a success people need to fully understand why and how you are going to roll it out and what they can expect, we can provide you with some templates to support this

Knowledge - We have created FAQs to support both the leadership team and the employees so they can all get the most from 121's and guidance for admins on how to prepare Knowledge and News

Insight baseline survey to get an understanding of how engaged your employees currently and set goals to where you want to be.

### Set - Engage is Here

#### Admin:

- Are all users signed up to the platform?
- Have you added the company logo?
- Have you set the 121 reminders?
- Is your new content uploaded and ready to go?
- Have you added tags to your Knowledge section?

#### Leader:

- Have you sent out invites for your first 121's?
- Are your people ready and understand what they have been invited to?
- Are you familiar with what Attitude, Energy, Performance and Knowledge mean?
- Are you clear on the 1-5 scoring system?

#### User:

- Have you added your photo?
- Have you filled in your 121?
- Which team member are you going to praise first?
- Is there anything you want to see in the Knowledge section?
- Do you understand the sentiment scoring?

## Engage - Engage for Growth

### What is a 121?

- A 1-2-1 is a short, regular meeting (virtual or physical) with your leader to speak about your performance, give and receive feedback, as well as agree actions for the month ahead.
- It's a positive experience and people look forward to it. The 121 takes place within the first two weeks of each month (option of quarterly).
- The invite needs to be sent as a calendar invite so the person can complete their 121 beforehand, giving the leader time to digest the information and prepare for the meeting (virtual or physical).

### Why score Attitude, Energy, Knowledge and Performance?

- We believe if you have the right Attitude, Energy and Knowledge you will perform to the best of your ability.
- **Attitude.** We believe people should have a positive attitude towards coming to work and the challenges it presents. We want you to enjoy work, enjoy the journey and learn from the challenges our growth creates...
- **Energy.** We want people to work hard, work accurately and with speed.
- **Knowledge.** We expect people to take responsibility for their own personal development.
- **Performance.** We expect people to consistently achieve targets.

### What is the sentiment analysis score?

- Engage is able to analyse Keywords in your 121's to help your leader understand your overall sentiment for the month.
- By choosing the words that represent how you feel Engage uses a scale of 1-5 (where 1 is least positive and 5 most positive) to get an overall indication of the sentiment of the keywords you chose.
- This means, your Leader gets a good understanding of how you're really feeling and can look at ways to support wherever possible. You can also look where you compare to others in the organisation.

### How does the scoring mechanism work?

- We operate a scoring system out of five within the 1-2-1 for you and your leader, this enables everyone to work to the same expectations and ensures consistency across the whole business.
- 5: Great 4: Good 3: Average — would be of some concern and needs to improve within 2 months we will offer support to help you. 2: Poor or 1: Very Poor

### Why do we have to do a 121 every month?

- We believe that regularity and consistency are the best way to drive performance, focus, and most importantly ensure that you build a strong relationship with your employees and that they feel valued and cared for.

### **Do you fill in the form before or during the meeting?**

- Yes, we advise that you complete the 121 form in good time, so that your team leader can read it prior to meeting and prepare for their response, which will be added to the form during the meeting.
- It is advised to put a calendar placeholder for the same time each month to complete your 121.

### **How long should a 121 last?**

- We recommend that a 121 should never last more than 30 minutes, if it does then this could mean you are not communicating regularly enough during the rest of the month.
- Some leaders choose to complete the 121 without meeting but complete the 121 with feedback and then speak with their employee for 15-30 minutes to review.

### **What should you aim to achieve during the 121?**

- The aim of the 121 is to continually focus on your performance, to ensure that you are documenting if you have completed what you set out to do for the previous month, and why you haven't, if you haven't, set goals to achieve for the coming month and celebrate what you have achieved.
- It is a time that's just for you and you should leave your 121 feeling valued and cared for, motivated and knowing what is expected of you. Set to hit your targets.

### **What if someone scores themselves a 5 for performance but haven't achieved any of the previous month's actions?**

- Any unachieved actions should be justified and moved on to next month's goals, this ensures they don't get forgotten. If actions are continually not being achieved this would need to review and may lead to performance management process.
- A 5 for performance would only be scored if the previous months actions had all been completed, and the person had displayed consistently strong performance.

### **Can we choose different Keywords for the sentiment scoring?**

- Yes, Admin users have access to a full bank of words available for selection. We recommend for you to change the Keywords every quarter to ensure you are getting fresh opinions from your organisation.
- If you do change the words, please make sure you use the same amount of positive and negative wording to keep the scoring accurate.

### **Can I access my previous 121's and view my leaders' feedback?**

- All of your historic 121's are saved in the Performance section under "My 121's". Here you will see all of your previous 121's completed on Engage saved, along with the feedback and scoring from your leader.

### **What happens if I get scored 3's by my leader?**

- A 3 is an average scoring on Engage, so we recommend to leaders that they advise their team members on what they can do to improve during the 121. If you need more help, please contact your leader on the next steps.

### **What should happen if I need to score my team member a 3 or below?**

- Open and honest conversation is the main strength of using Engage, so don't be afraid to give someone some constructive feedback. Its best to come to the 121 with the reasons for a 3 and come up with a plan together of how they can improve and get to more positive scoring.

### **How can I use the stats from Engage to show the trends in the organisation?**

- In the Performance section under "My Teams Insights" there are a range of graphs that have analysed the data from the 121's and shown various comparisons (e.g. by month or department). If you want to analyse these further, under the Admin section you can download a spreadsheet of the raw data.

### **I don't think I have enough time to complete this every month?**

- The highlight of Engage is that the 121's are made to be easy to do, and what we learnt through our winning methodology is that contact and quick communication is more productive than the once a year appraisal.
- Don't knock it before you try it!

### **I work out of the office, how can Engage suit me?**

- With Engage, the platform is accessible from anywhere. With the consistent use our hope is the communication will increase and allow you more access to your leader and the going's on with the organisation without even being there.

# **The voice of the employee**

## Top Tips

**Team member** – Fill in your 121 with plenty of time prior to the meeting so your Leader can read it before you meet

**Leader** – Ensure you read it fully before you go to the catch up, so you can prepare answers and foresee and challenging conversations.

**Team Member** - Select up to 5 words that best described your month – don't overthink it go with your gut feeling – it needs to be honest.

**Leader** – Address this as soon as the 121 starts and discuss each word - Talk me through your selections of keywords for the month – what led you to select 'x' and why?

**Team Member** - Highlight at least 3 positives– you can go into the 121 during the month, so you don't forget all the good stuff, this is your chance to show your manager just what you have achieved – don't be shy.

**Leader** – If the person hasn't added many things try and get them to think about more and you can add more to the box during the meeting, likewise, give constructive feedback if they are adding things that are not really positives

**Team Member** - Highlight challenges you have faced but you are being empowered to give ideas on how you might resolve each of these.

**Leader** – Support the team member with the challenges they have faced and work together to resolve.

**Team Member** - A chance to focus on next month's actions, this can be a mix of your long-term goals as well as short term responsibilities. If you haven't completed the ones from last month – why? Should you be moving them forward?

**Leader** – Agree the actions with the team member so clear expectation is set and add or remove anything during the meeting so its transparent and people know where they stand.

**Team Member** - Transparent, open, honest scoring – rate your own attitude, energy, knowledge, performance on a scale of 1-5. now rate 'my leader' (manager) performance on the same scale. There is no point scoring yourself all 5's if you know you aren't as you have to justify it, add context behind these rating, can edit the overall entry before selecting 'send to leader'.

**Leader** – If you need to score someone 3 or below you must justify it and give them advice and clear expectations on how to move up to a 4 or 5.

### Talking Points

*I noticed you rated 'attitude/energy/knowledge' a 3. Talk me through how you arrived at that rating and what support would get this closer to a 5?*

*You have rated my performance a 5, what specific things have I done this week/month to warrant that rating for you?*

*You have rated my performance as a manager a 1,2,3,4 – what would get us closer to a 5?*

# engage

It's about engaging with Engage, use the platform to your advantage and get the most out of it.

Ready. Set. Engaged.

