



best companies™

Facilitator Guide

Action Planning Workshop





Introduction

In this facilitator plan we have put together some advice and guidance to ensure that you are comfortable with the facilitation of your action planning workshop. The guide will also help you understand your data to generate the best possible output.

We recommend looking through this guide alongside the workshop presentation deck. There are notes underneath each slide in the presentation deck that will assist with the facilitation, however this facilitation guide goes into further detail.



**Preparing for your
Workshops**

The purpose, objectives and outputs

Purpose

The purpose of an action-planning workshop is to generate actions to improve engagement within your organisation.

Workshop objectives

- Provide an opportunity for employees to contribute to engagement initiatives and take ownership
- Generate actions to improve engagement within your organisation
- Give employees the opportunity to spend time with their teams outside of the working environment. This can increase understanding of each individual's role in the organisation and their pressures.

Desired outputs

- Actionable steps that will build on engagement strengths
- Actionable steps that will address engagement issues and weaknesses
- Best practice examples drawing from what each department does well to promote departmental sharing/learning.

Strategic Initiatives

- During the workshop there is an opportunity to share strategic initiatives alongside survey data for the organisation as a whole. This needs consideration at a top-level prior to the workshop. You will find more information on strategic initiatives within this guide.

Share data prior to the workshop

Following the close of the survey, each manager should have had the opportunity to share how their business area has performed. The workshop should not be the first time your team see the data.

This is an important step in the survey process, as all employees will feel as though they have been heard and will feel confident that the organisation is going to act upon the results. We would strongly recommend using the SWOT Data Packs, as these can be generated for each of your employment groups and will easily identify the strengths, weaknesses, opportunities and threats for that specific area.

By allowing all of the attendees to have had prior sight of the data, it will ensure they have had enough time to reflect on what patterns the data is showing, meaning that the action planning workshop can be as productive as possible.

Arrangements – venue

- You can't solve a problem in the mindset it was created. Your workshop should be held off-site wherever possible. Hosting your workshop in a new environment can help with creativity and thinking about your challenges in a different way.
- We recommend choosing a venue with plenty of natural light and has enough room to accommodate each breakout group. You will need to consider whether the groups will be standing or sat down and allow enough space for this.
- Arrange lunch or refreshments breaks as required.
- We recommend approximately 3.5 hours to complete the full workshop as per the proposed agenda.

Arrangements – participants and facilitators

Workshop participants

- Each workshop should consist of between 20 and 30 employees. We find that people won't feel heard and will be less likely to contribute in groups of over 30 people. The group should consist of the people that contributed to the data being displayed as the data will be specific to them.
- Depending on numbers, workshops could be arranged for each employment group/ department as they are more likely to be encountering the same issues. The relevant employment group data can then be used to present during the workshop.

Workshop facilitators

- Facilitators of the workshops should be the managers or leaders of the relevant group of attendees. We wouldn't recommend the managers or leaders taking part in the group activities as it can affect how confident employees feel in expressing their true feelings.
- Facilitators should create an open and relaxed atmosphere to encourage contribution and to ensure the workshop is structured so that objectives are achieved.
- They will need to understand the b-Heard survey results for their business area and be familiar with the action-planning workshop deck and notes. Your Best Companies project manager will be able to help if you have any trouble understanding the data.

Arrangements – subgroups and invites

Workshop sub-groups

- During the workshop the group will need to split into smaller groups for break-out activities.
- We recommend no more than 6 groups, with the individual groups consisting of 5-7 employees.
- These groups should be decided prior to the workshop and personalities should be considered; you do not want a group made up of solely strong characters as this can be counterproductive. A group of solely introverted characters can have the opposite effect and can make it difficult to get the desired outputs.

Send out invites

- This should be done in advance to increase the likelihood of attendance.
- We would recommend that the workshop is made compulsory to give everybody the chance to b-Heard and embark on the engagement journey.
- Provide a point of contact for questions. This could be their line manager or the Best Companies project manager/ representative in your organisation.

Arrangements – collateral and print outs

Collateral

- Each group will need a total of 4 sheets of A1 paper for the workshop. We recommend pre preparing the A1 pieces of paper with the group number and question/task that they are working on. This will aid in the feeding back process following process.
- Flipchart pens and print outs for each breakout group.
- ***This is an optional activity for the workshop.*** In order to receive true feedback to this question all delegates would need to download **sli.do** before the event. It would be up to the facilitator to ensure that this happens prior to the workshop.

Prepare print outs

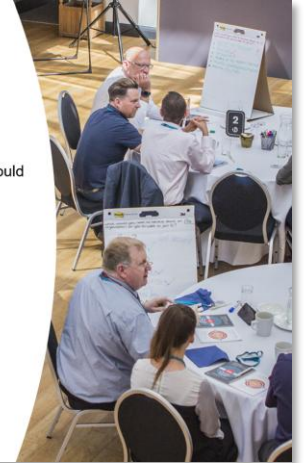
- To aid the groups when they are working in their breakout groups, we advise printing out the following:
 - ‘Celebrate’ heatmap for each group
 - ‘Celebrate’ task and question for each group
 - ‘Improve’ heatmap relevant to each group
 - ‘Desired outcome, Current reality’ for each group
 - ‘Action steps’ for each group
- We wouldn’t recommend providing all of the print outs to the groups at once, they should be handed out at the start of the relevant exercise.

Agenda

- We recommend approximately 3.5 hours to complete the full workshop as per the proposed agenda.
- This can be tweaked to suit your facilitation style and any added content.
- It's important to retain a balance of having enough time for people to contribute without allowing too much time for people to become too relaxed and lose focus.

Agenda

09:00	Introduction
09:10	Strategic initiatives
09:20	If you could change one thing about this organisation tomorrow, what would you change?
09:25	"One to Celebrate, Three to Improve" introduction
09:35	"One to Celebrate" exercise
10:05	"One to Celebrate" feedback
10:20	Refreshment break
10:40	"Three to Improve" current reality and desired outcome exercise
11:10	"Three to Improve" current reality and desired outcome feedback
11:25	Current reality to desired outcome exercise
11:50	Current reality to desired outcome feedback
12:10	Next steps
12:20	Session ends





Conducting the Workshop

Setting the scene

At the start of the workshop, it is important to set the scene. Due to day-to-day business pressures, it could be that the b-Heard survey was completed a couple of months prior to this workshop. This is why it is essential to remind the audience that the data which is going to be used today has derived from the group's responses to the b-Heard survey.

Explain that this workshop will enable you to recognise what you as a team and department think the organisation does well and what you could do to improve.

With the introduction of Organisational Health into our 8 factor model and ensuring that we give you a holistic approach to understanding your data and devising strategic actions off the back of your survey, we've made the decision to include all 8 factors as options for selection within your packs.

Utilising the action planning packs down to Team Member level and including your employees in sessions focusing on all 8 factors will enable you to gain realistic and honest feelings about some of the factors that you wouldn't normally focus on (Leadership, Fair Deal for example). This 360-feedback approach is designed to give you a more comprehensive view of the successes and challenges you face as an organisation/department.



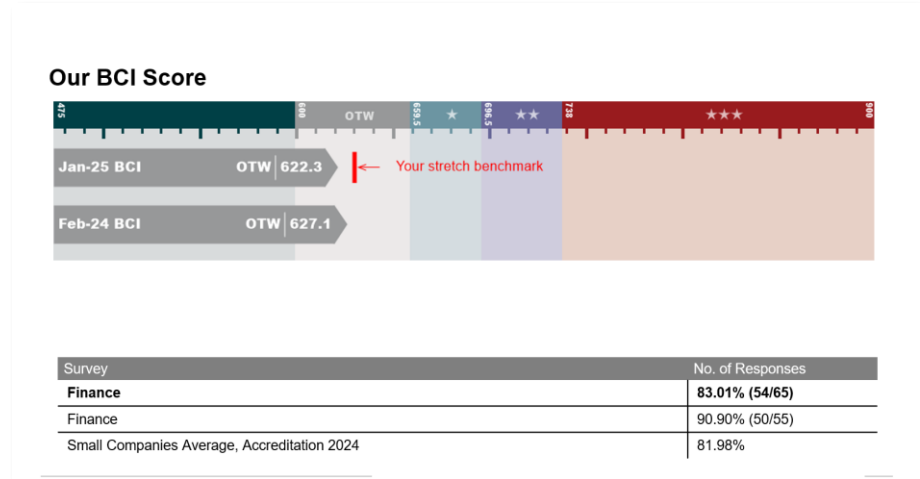
BCI scores

BCI score stands for **Best Companies Index Score** and is a recognised standard for employee engagement. It is calculated by combining the responses to our eight workplace factors. The BCI score is on a scale of 0-1000, although most companies fall between 475 and 900.

The stretch benchmark that your data is compared to throughout the data pack is shown here, as well as response rates from this survey and any previous surveys.

Accreditation explained:

- **'One to Watch'** represents a **good** level of engagement, having achieved a minimum score of 600.
- **'One Star'** represents a **very good** level of engagement, having achieved a minimum score of 659.5.
- **'Two Stars'** represents an **outstanding** level of engagement, having achieved a minimum score of 696.5.
- **'Three Stars'** represents a **world class** level of engagement, having achieved a minimum score of 738.



Strategic initiatives

Within the strategic initiatives section, you are able to provide an overview of the key strategic themes identified in your data.

These should be at a strategic level rather than at a tactical level i.e. aspects that senior leadership/management team will work on improving. It's an opportunity to share any actions that you have decided to take on the back of the results. It is important to ensure that your strategic initiatives are consistent throughout every action planning session completed within the organisation

Prior to introducing the areas that each group will focus on, it is essential that the strategic initiatives are introduced and referred back to so that attendees feel acknowledged in their feedback from the survey.

Within this section, you will also find slides containing data from your organisation. There are notes underneath each slide to help you explain what they mean. For your top 15 (key engagement drivers) most highly correlated questions we have put a more detailed explanation of correlation on the next page of this document.

Correlation (1 of 2)

A lot of the insights we can derive from your engagement data comes from looking at connections and correlations, so what is correlation?

Correlation is defined as the relationship between 2 or more variables, the variables we are looking at are the relationships between the individual statements on the b-Heard survey and overall engagement or indeed disengagement within your organisation

We measure correlation using the Pearson Coefficient scale – a scoring system where 1 is a perfect correlation and a score of zero shows no correlation at all, a score higher than 0.3 is seen as 'statistically significant' and represents a relationship between the two variables. 10-point if a variable has a Pearson Coefficient score of 1, that means a 10-point increase in this variable would result in the other variable increasing by 10 points.

Correlation can help us understand how each of the b-heard survey statements impact overall engagement, both directly and indirectly. Here is an example of an organisations top 15/key engagement driver statements, as you can see the statement most correlated to engagement for this organisation is 'My manager cares about how satisfied I am in my job'. If you were only going to ask one question to establish how engaged or disengaged, your organisation is, this is the question you would ask.

Our Top 15 most highly correlated questions

Most highly correlated questions	Pearson Correlation	Key
My manager cares about how satisfied I am in my job	0.836	Managerial Engagement
My manager takes an active interest in my wellbeing	0.819	Organisational Clarity
My manager does a lot of telling but not much listening	0.786	Engagement Questions
I have confidence in the leadership skills of the senior management team	0.729	
The leader of this organisation runs this organisation based on sound moral principles	0.722	
My manager cares about me as an individual	0.721	
Sometimes I feel that my manager takes advantage of me	0.714	
My manager would be quick to respond if I showed signs of being under too much pressure	0.709	
I would leave tomorrow if I had another job	0.706	
My health is suffering because of my work	0.705	
I love working for this organisation	0.694	
I am under too much pressure at work to perform well	0.686	
This job is good for my own personal growth	0.682	
This organisation is run on strong values / principles	0.682	
There are limited opportunities for me to learn and grow within this organisation	0.679	

Correlation (2 of 2)

On our 7-point scale, if you were to score this question a 6 or a 7, which is 'agree' or 'strongly agree' the correlation score of 0.719 predicts that you are highly likely to go on and score all the other statements positively. However, if you were to score the same statement as a 1 or a 2, which is 'strongly disagree' or 'disagree' you are highly likely to go on and score all the other statements negatively.

Examples of correlation are – the more it rains, sales of umbrellas increase, the more time you spend running on a treadmill, the more calories you will burn and when the temperature increases outside, so do sales of ice cream.

The power of your organisations top 15/key engagement driver most correlated statements, is that rather than focusing on all of the other statements on the b-Heard survey you can focus in on more of the strategic themes that come from your survey's data. For most organisations they have a combination of both managerial engagement and organisational clarity statements, this reinforces that the My Manager and Leadership factors are two of the three driving factors of engagement.

Very often the statements, 'I love working for this organisation', 'I would leave tomorrow if I had another job' and 'I feel proud to work for this organisation' will feature in you top 15. This is because they are pure engagement questions and sit within the My Company factor.

Focusing on and improving the strategic themes from your top 15 most correlated statements, will result in a significant increase of engagement levels within your organisation.

If you could change one thing about this organisation tomorrow, what would you change?

As this workshop is based around factors that an individual can impact themselves day to day, factors such as Leadership, My Company and My Manager will not be focused on.

By asking the question 'If you could change one thing about this organisation tomorrow, what would you change?', the group will feel like they have had an opportunity to contribute to the factors out of their control, reinforcing the fact that they have been heard.

Sli.do is a Q&A app that allows users to answer questions anonymously, which is essential if your are going to ask the audience this question. If downloading **Sli.do** is not an option for your workshop, you could use a more traditional method of asking the audience to write down their answer and place it in a sealed box, however this is not an option we would recommend

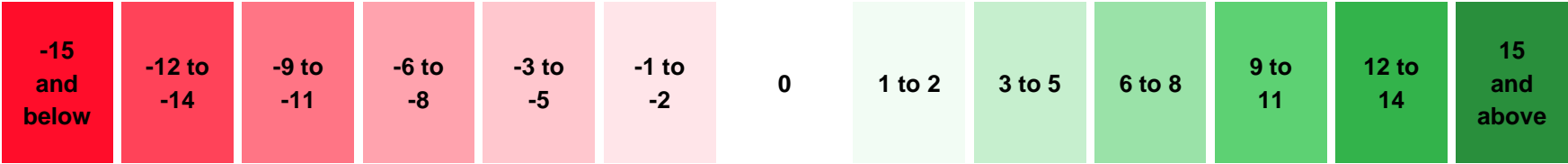
You will be able to collate the responses and share them with the group after the workshop alongside any actions/outcomes.



Colour coding scale

On the data charts included in the workshop presentation deck you will see that we use a scale of red to green to help you see how you're performing against a given benchmark.

The deeper the red you see, the poorer your performance and the deeper the green, the better.



The results on each chart are displayed as a percentage difference from given benchmarks.

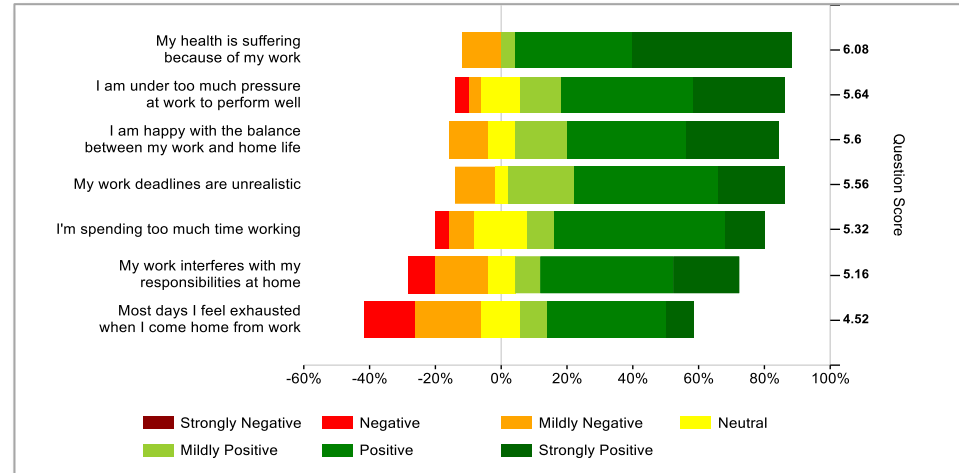
Understanding heatmaps (1 of 2)

The benefit of heatmaps is that they allow you to visualise the response pattern for the statements. You will see how the majority responded and the spread of the responses. It gives you a better idea of how many people responded at each point.

Whether the heatmap shows a positive or a negative picture overall it's possible to identify areas for improvement.

For example, on a heatmap where all responses are towards the positive end of the spectrum it is still possible to identify opportunities. 'Mildly positive' and 'positive' responses are of course a good thing, but you will be aiming to look at ways to increase the amount of 'strongly positive' responses.

The vertical axis on the right illustrates the overall mean/average score the question has achieved meaning the higher the score the better you have done on the statement. The highest possible score is 7.



In this example, 'My health is suffering because of my work' has achieved a high mean score of 6.08/7, however there is still some room for improvement as a small number of responses are 'Mildly Negative'

Understanding heatmaps (2 of 2)

Each block of colour illustrates the response pattern that was left by the group. The colour key coincides with what response (out of a score of 7) each colour relates to. This is also broken down as follows:

Strongly Negative - mean score of 1

Negative - mean score of 2

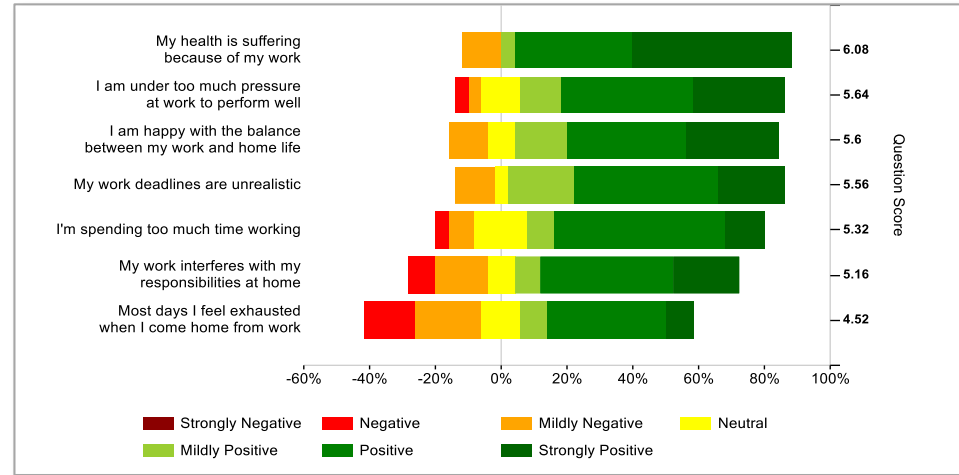
Mildly Negative - mean score of 3

Neutral - mean score of 4

Mildly Positive - mean score of 5

Positive - mean score of 6

Strongly Positive - mean score of 7



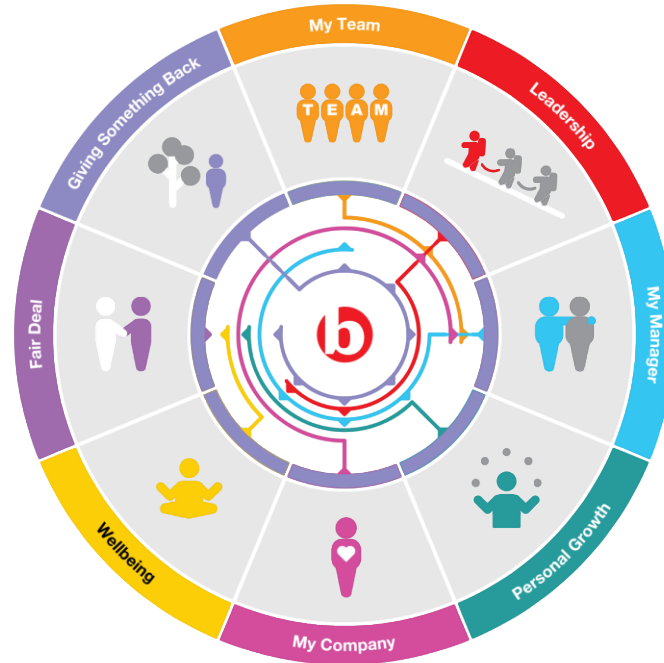
The 8 factors of workplace engagement (1 of 3)

The b-Heard survey is based on the 8 factors of workplace engagement identified by Best Companies.

Through exploratory and confirmatory factor analysis, we are uniquely capable of identifying the deep and independent relationships between the 8 factors of workplace engagement.

To see how each of the 8 factors intercorrelate with each other, view this slide in 'slide show' mode and click through the animations.

A description of each of the factors can be seen on the following slide.



The 8 factors of workplace engagement (2 of 3)



My Team benefits from a high scoring My Manager factor, as the manager is key to creating and sustaining a productive and positive work environment. An employees perceived team will be those they work with on a daily basis.



Leadership has the biggest influence on the My Company factor. The leadership culture sets the tone for either good or poor levels of wellbeing. Leadership needs to drive forward change whilst creating a balance between work & personal life.



My Manager a great manager will sell the direction and vision of the organisation and so directly impacts the My Company factor. A great manager will also take a interest in the personal growth of their people and in turn this will result in them taking a greater interest in what their manager is trying to achieve. Great managers will build effective teams and help to break down any silo cultures between teams. Managers impact wellbeing by managing workload and recognising people have a life outside of work.



My Company is a stand-alone factor, created by output statements such as 'I love working for this organisation' and is made up of an aggregate of all the other factors. If the other seven factors, especially well-known scoring well, you will see a higher My Company score. The only exception to this rule is where the organisation has a strong well-known brand; this can enable the My Company factor to score highly without a high leadership score.

The 8 factors of workplace engagement (3 of 3)



Personal Growth is strongly correlated to Fair Deal, as if we are developing our people they are more likely to be happy about their pay and benefits. A stronger learning and development culture within the organisation can aid higher scores in Personal Growth.



Wellbeing is a product of leadership and management culture, linked strongly to fair deal and a balance between the two is key to success in both areas. For example, if you are paid a fixed salary and asked to work longer hours this will have a different negative impact than if you were paid a wage per hour.



Fair Deal is a hygiene factor and whilst it is important in engagement, it is more of a disengager than an engager and therefore must be set at the right level. You could pay people twice as much money, however they would still have the same views on Leadership and Management culture and certainly wouldn't be twice as engaged. Fair deal is not as highly correlated to engagement compared to the other seven factors.



Giving Something Back or giving back to the local and wider community involves how we think about the environment and whether profit & budget concerns are the only thing driving the organisation. It is interesting to note that this is the only factor that impacts all of the other factors positively.

“One to Celebrate, Three to Improve”

Our 8 factor scores

The chart featured on this slide illustrates how the group has responded to each of the 8 factors. You should feel comfortable providing a brief overview highlighting where you have scored well and not scored quite as well.

With the introduction of Organisational Health into our 8-factor model and ensuring that we give you a holistic approach to understanding your data and devising strategic actions off the back of your survey, we've made the decision to include all 8 factors as options for selection within your packs.

Utilising the action planning packs down to team member level and including your employees in sessions focusing on all 8 factors will enable you to gain realistic and honest feelings about some of the factors that you wouldn't normally focus on (Leadership, Fair Deal for example). This 360-feedback approach is designed to give you a more comprehensive view of the successes and challenges you face as an organisation/department.

Our factor to celebrate

This slide highlights the chosen factor to celebrate which you will be focusing on for this activity. The next slide will highlight the scores for this factor on a chart.

Factor to celebrate – Heatmap

This slide illustrates the factor that you will be celebrating in the form of a heatmap. It is important to print these slides out for the relevant breakout groups, as detailed previously in this document.

More information on heat maps can be found in this guide.

Breakout groups

This slide will be populated with the names of the employees split into groups. More information on setting up groups can be found in this guide.

“One to Celebrate, Three to Improve”

Task

This is an opportunity for people to think of examples of best practice within the chosen factor to celebrate. You are looking for output examples. You can use your own example or choose from the below:

My Team - ‘The team helped me out when they could see that I was struggling’

Personal Growth - ‘Ability to use new systems and develop my leadership skills’

Wellbeing - ‘I have the freedom to help with childcare’

Giving something back - ‘We have raised xxx money for our local charity’

Leadership – ‘we have established clear communication channels that are constantly updated’

You are not looking for how or why we do these things well. We’ll be looking at the policies and practices that the company have put in place in the next slide, for now you are looking for the results of these policies.

Question

After the groups have identified examples of best practice within the chosen factor to celebrate. We will now move on to sharing ‘the input that generates the output’. This is the opportunity to share specific actionable things that we do that has contributed to the examples shared in the previous slide. You can use your own examples or choose from the below:

My Team – ‘Potential candidates have peer to peer interviews with a member of the team, ensuring a strong team fit’

Personal Growth – ‘Budget for training’

Wellbeing – ‘Flexi-time’

Giving something back – ‘Optional volunteering days’

Leadership – ‘more sight of senior figures around the organisation’

It is important to print these two slides out for the relevant breakout groups to refer back too. Answers should be written on the pre prepared A1 flipcharts, as detailed previously in this document

“Three to Improve” current reality and desired outcome exercise

Our 8 factor scores

The chart featured on this slide has already been shown and illustrates how the group has responded to each of the 8 factors. This chart is used to identify the 3 areas that you are looking to improve.

Our 3 factors to improve

This slide highlights the 3 factors that you will be focusing on improving.

Heat maps

These slides show the response pattern for the 3 factors that you will be focusing on. It is important to print these slides out for the relevant breakout groups, as detailed previously in this document. More information on heat maps can be found in this guide.

Desired outcome – Current reality

More information to guide you on this slide can be found on the following slide.

Breakout Groups

The same groups should be used for this activity. To decide which factor each group will be focusing on each group will need to pick a letter as displayed in the action planning presentation.

Once letters have been allocated you can move on to the following slide which will reveal what each group will be focusing on. It is important to reveal what factor each group will be working on in this way, so that people don't feel that they have been intentionally given specific factors to work on.

“Three to Improve” current reality and desired outcome exercise (1 of 2)

Without clear and achievable objectives, an organization can find itself in a state of inertia: energy is misdirected, communication breaks down and motivation is lost.

Some managers or organizations will try to counter this problem through incentivisation or **pushing** their teams to act, whether or not they have any idea what action really needs to be taken.

Engaged organisations create **pull** by opening up the conversation about where they are now, and where they want to be. By doing this they involve their employees in making a plan to move forward together.

This “**pull**” is what we call ‘**Structural Tension**’ – it is a flow of positive energy that carries an organization forward from their “current reality” towards their “desired outcome.”

So how do you create **structural tension** in your organization?

Desired outcome –

- ✓ Language in the present tense
“We have achieved XYZ”
“We are now ……….”
- ✓ Should cover all areas of the factor
- ✓ A picture of what we want to have achieved, not the process to achieve it

Current reality –

- ✓ Tell it like it is, a really honest picture of where we are now
- ✓ State what the reality is, rather than how it got to be that way

Write your desired outcome here in the present tense, as though it has already been achieved

Desired outcome:

Current reality:

Write your current reality here in the present tense

The slide features a background image of a meeting. On the right, there is a form with a vertical red arrow pointing upwards. The top of the arrow is labeled 'Desired outcome:' and the bottom is labeled 'Current reality:'. Red boxes with white text provide instructions for each section: 'Write your desired outcome here in the present tense, as though it has already been achieved' at the top and 'Write your current reality here in the present tense' at the bottom. The form itself has several horizontal lines for writing.

“Three to Improve” current reality and desired outcome exercise (2 of 2)

Start by defining your **current reality**. This has to be an honest reflection of where you are now – the more honest you are, the more effective the structural tension will be. Take a look at this example from an organization looking to improve their ‘My Team’ Factor.

“**Current reality:** Teams in this organization don’t work as well together as they should. They spend more time gossiping about ‘rival’ teams than they do solving issues and challenges.

It isn’t pretty but it’s honest. It states in clear and simple terms what their survey results and comments have told them: They have a problem with team interaction and communication – their teams are more interested in scoring points against each other than helping the organization as a whole. It’s not a nice place to be, but at least everyone agrees that this is their current reality.

The next step is to create a “**desired outcome**.” This has to be written as a vivid and specific vision of the future. It also has to be written in the present tense – as though it has already been achieved – because “we would like” and “we could try” quickly become “we were too busy” and “we didn’t”. Take a look at this example from an organization.

“**Desired Outcome:** Our teams work energetically and passionately in service of one another and of the company as a whole. Each team is aware of the challenges and opportunities facing the other parts of the business – they proactively and intelligently share the load across departments at times of pressure and come together to celebrate achievements as one.”

It sounds a lot better, doesn’t it? The current reality exercise has given everyone a chance to unburden themselves of their frustrations – and the ‘desired outcome’ has given them all an inspiring future to work towards.

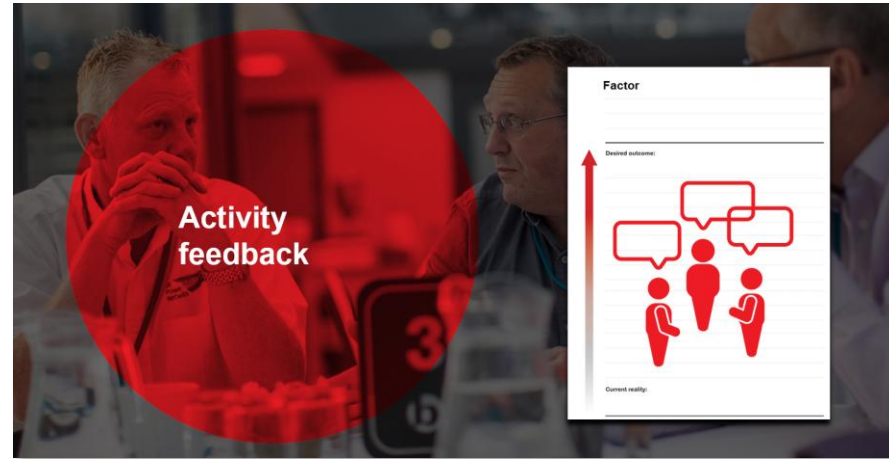
Activity feedback

Following on from each activity it is important to allow each group to present back their perception of the current reality of their chosen factor, as well as their agreed vision for the future (desired outcome).

While the groups are presenting back, it may be a good time to remind the group that actioning everything from the workshop should be seen as a team effort and not just left to management to action.

Where possible every team member should feel empowered to start actioning tasks that don't require significant input from management.

It is important that all flipcharts and sheets of paper are collected or photographed to assist management when collating all of the feedback following the workshop

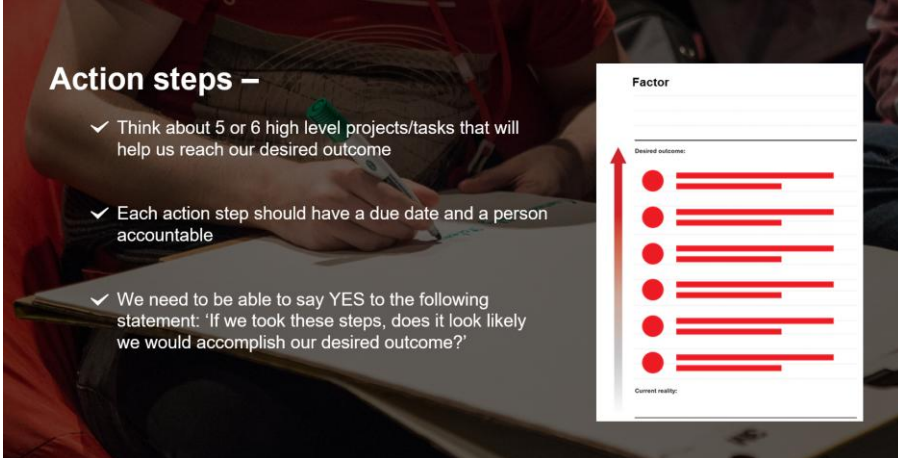


Current reality to desired outcome exercise (1 of 2)

So we know our **current reality** and have defined our **desired outcome** – how do we bridge the gap between the two?

We do this by defining 5 or 6 actionable tasks that would help make that vision of the future a reality. In order to be effective they need to be set to specific and achievable timescales and assigned to a team or individual who will make the commitment to getting it done.

Remember our example organization with their uncooperative teams? They need to put clear plans in place to lift them out of their rut, the examples on the following slide illustrate the clear actions they need to take in order to reach their **desired outcome**



Action steps –

- ✓ Think about 5 or 6 high level projects/tasks that will help us reach our desired outcome
- ✓ Each action step should have a due date and a person accountable
- ✓ We need to be able to say YES to the following statement: 'If we took these steps, does it look likely we would accomplish our desired outcome?'

Factor

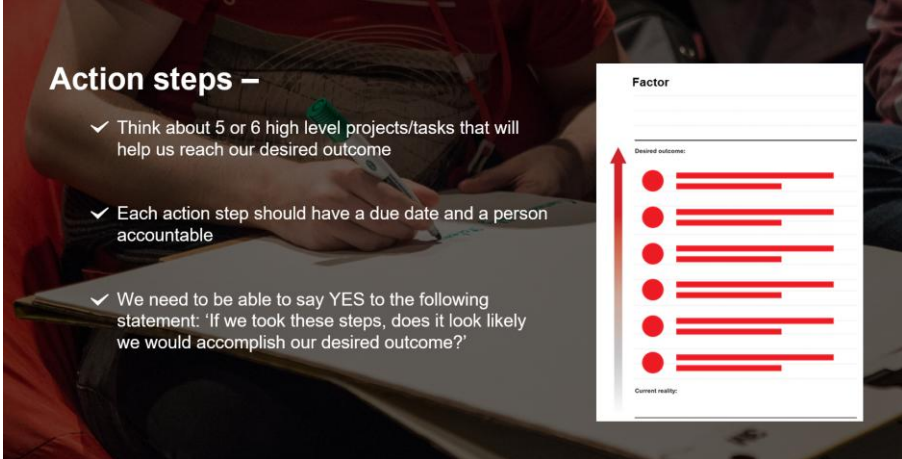
Desired outcome:

Current reality:

The image shows a person's hands writing in a notebook. Overlaid on the notebook is a checklist titled 'Action steps' with three items. To the right of the notebook is a white box titled 'Factor' containing a bar chart. The chart has a vertical red arrow on the left side pointing upwards. The chart shows six horizontal bars, each starting with a red circle. The bars represent the gap between 'Current reality' and 'Desired outcome' for six different factors. The bars are of varying lengths, indicating different levels of progress or achievement.

Current reality to desired outcome exercise (2 of 2)

1. Put anonymous feedback system in place (postbox or online) so honest comments can be channeled straight to the team leaders without fear of reprisals
2. Arrange weekly 'team leader' meetings where frustrations can be aired, contextualized and addressed at a management level
3. Guarantee time at team meetings to update team members on what the other teams are doing and why – what their challenges are and what we can do to help
4. Create a quarterly off-site bonding activity where teams can socialize and even compete in a healthy way
5. Recognize and reward the best team players, the most supportive managers and the most engaged team.



Action steps –

- ✓ Think about 5 or 6 high level projects/tasks that will help us reach our desired outcome
- ✓ Each action step should have a due date and a person accountable
- ✓ We need to be able to say YES to the following statement: 'If we took these steps, does it look likely we would accomplish our desired outcome?'

Factor

Desired outcome:

Current reality:

The image shows a person's hands writing in a notebook. Overlaid on the right is a 'Factor' chart. The chart has a vertical axis with an upward-pointing red arrow. It lists 'Desired outcome:' at the top and 'Current reality:' at the bottom. Between them are six horizontal bars, each starting with a red circle. The bars represent the gap between the current reality and the desired outcome for six different factors.

None of these tasks are particularly complicated or challenging, but combined they create a clear and time-bound journey towards improved levels of engagement. It's a plan that follows that flow of energy created by **structural tension** to lift the organization from a place of conflict and disengagement to one of support, collaboration and celebration.

Next steps

We have provided 3 recommended steps within the workshop presentation deck:

- Generate a piece of best practice around your factor to celebrate
- Management to review current reality/desired outcome work and feedback to department
- It's everyone's responsibility to drive change – we will be looking for champions to track progress on the action points.

Within the workshop you should share more information on how this will be done and how progress will be shared. It's important to consider when and how these next steps will take place, how will you be following up with the group and what method will be using for information sharing.

We recommend using a method such as Microsoft's Viva Engage or your organisation's intranet site to share the feedback from the workshop and encourage outcomes (once reviewed by management). You can post projects on there which can be driven forward by volunteers who attended the workshop. By sharing the responsibility, you are likely to achieve more.

It's important to thank the employees for their input and contribution during the workshop as part of the official closing of the workshop.



**Following your
Workshop**

Following your workshop

Following the workshops, you should have clear insights from each group as to what the Current Reality and Desired Outcomes are, and actions that need to be completed to achieve these.

During the workshop you should have already shared an outline of the next steps and how information and progress will be shared. You may have opted to use methods such as your internal intranet site or programmes such as Microsoft's Viva Engage. It is important that this is followed through and that the output from the Action Planning is shared. This would include the current reality, desired outcome and objectives.

Whilst it's fresh in the memory of the delegates, we recommend gathering anonymous feedback about the event, such as how people felt about the workshop venue/location, the presentation style of the facilitator, their ability to contribute honestly, the workshop output and their confidence that the workshop will be followed up. Your key to achieving your desired outcomes is dependent on how visible the continuing improvements will be made. Making clear who is doing what, and when particular milestones are reached, will emphasise that your employee's suggestions have been worked on to make change for the better.

Collating Workshop Outputs

We recommend collating all the output from the Action Planning Sessions into a central hub. You may find that other areas of the business have assigned similar tasks to target improvement and have factors to celebrate that focus on the same areas, and to avoid duplication of effort we recommend that teams adopt a collaborative approach. This also pools knowledge and experience from different departments.

Once this has been collated, management should then process what has been summarised. If the leaders of an organisation have sight of the input, they will be able consider this in future strategic planning and give the best opportunity for positive change.

The summary should then be made available to everyone. Individuals may not be privy to conversations that other colleagues had in their workshops, and this allows the key problems and ideas to be shared.

Celebrate the Good Stuff

It is important to share the Best Practice from the workshops, allowing you to celebrate what you do well and making knowledge flow through your organisation. Collating these, like the desired outcomes and objectives, provides everyone with a clear breakdown of what the organisation does well.

This may help other parts of the organisation to improve their engagement, but it's also key to reinforcing the good initiatives that are in place for your people. Whatever method you choose to share Best Practice, such as Microsoft's Viva Engage or your intranet, it should be accessible and allow Managers to reach out to one another.

They should be able to provide support to other Managers who may not be scoring so well on the Workplace Factor that they celebrated. To further emphasise how their best practice works, managers could host peer to peer sessions to help apply best practices in their own settings.

Key Steps for Successful Outcomes

This comes down to who, doing what, when and how it's measured! *Who & What* Following the actions to achieve the desired outcomes, you need to consider who is going to do what and assign responsibilities. If tasks aren't allocated, things may get forgotten about and the change we want to see won't happen.

Tasks might be best handled by one individual, or by a whole group from across the business. Regardless of who is taking the tasks on, it is important that these are transparent to prevent information silos and confirm the accountability of those taking on the actions.

Preferably, people should assign themselves to tasks, by doing so they are more likely to put more effort in. Alternatively, people can be chosen to be assigned to tasks taking into consideration experience and capacity

Key Steps for Successful Outcomes

When monitoring & tracking actions, each task needs a target date. This will ensure that there is a deadline to focus and work to and will help ensure they do not get overlooked by everyday tasks. It is important that dates are realistic and achievable. Each task is likely to have a different timeline in terms of how quickly progress can be made and how quickly it can be completed.

In order to truly understand whether an action plan has been successful you will need to decide how to measure whether the implemented tasks have been successful. When setting the schedule for the activity it is beneficial to have interim targets, making it trackable and allow people to see they are on course and share and celebrate their progress.

Running a Pulse survey will give you near-real-time measurement of how successful the implemented tasks have been. Pulse surveys are a great way to track progress and understand if action plans are working so modifications can be made quickly where required.

Key Steps for Successful Outcomes

A Quick Note on Tracking Actions We think it's worth considering how you go about recording, tracking and sharing your progress. This may not be necessary for all organisations but considering what processes or software you use can help your employees flourish when carrying out their objectives.

There are plenty of options available, and you may have an inhouse programme you already use for similar projects. Some programmes you may wish to consider are Trello and Team Gantt, though there are plenty available, and it may help to explore the many options though sites like Capterra or G2 where you can compare features and software.

As we mentioned earlier, keeping the entire action planning process visible to everyone is your key to increased workplace engagement!



Thank you

If you have any questions or want any more information, please call us on **01978 856 222** or email support@b.co.uk