



**best companies™**

## Action Planning Workshop

Finance

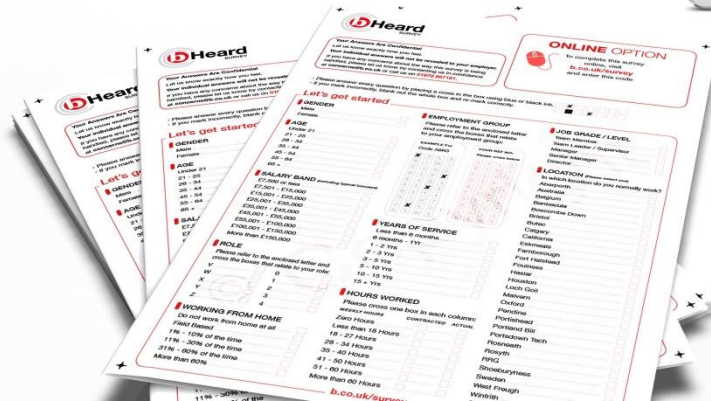
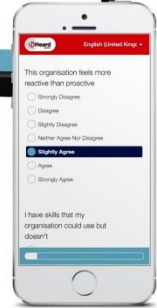
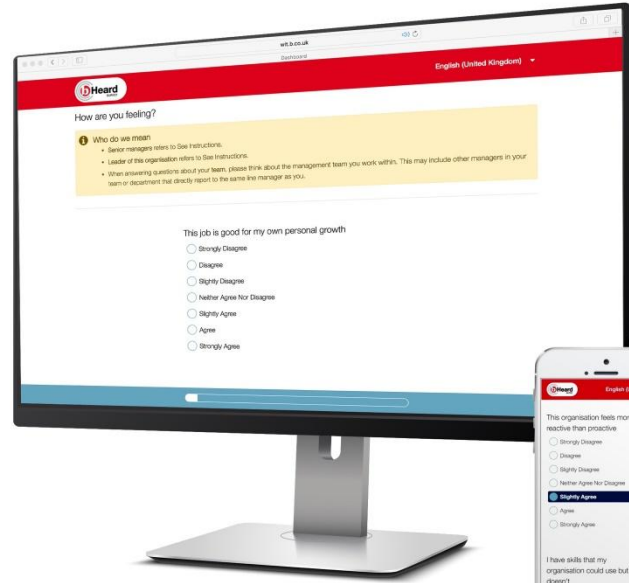
April 2025

# Agenda

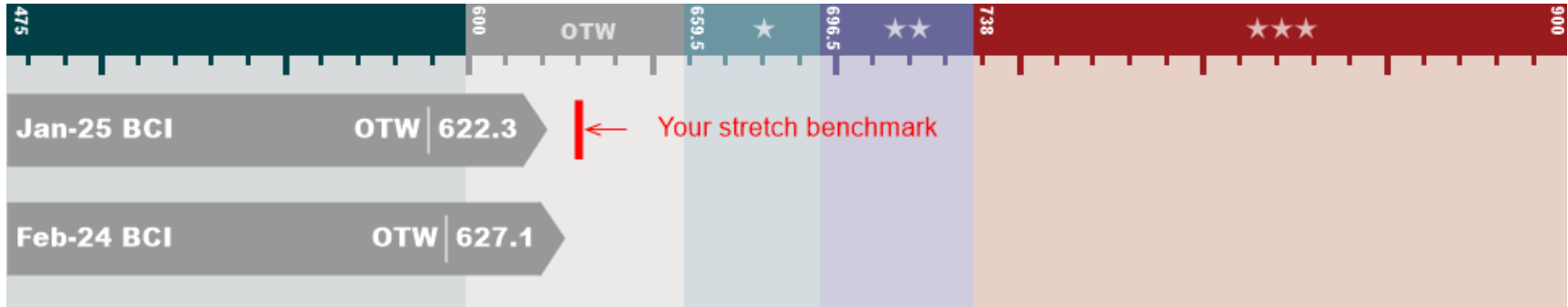
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# bHeard SURVEY



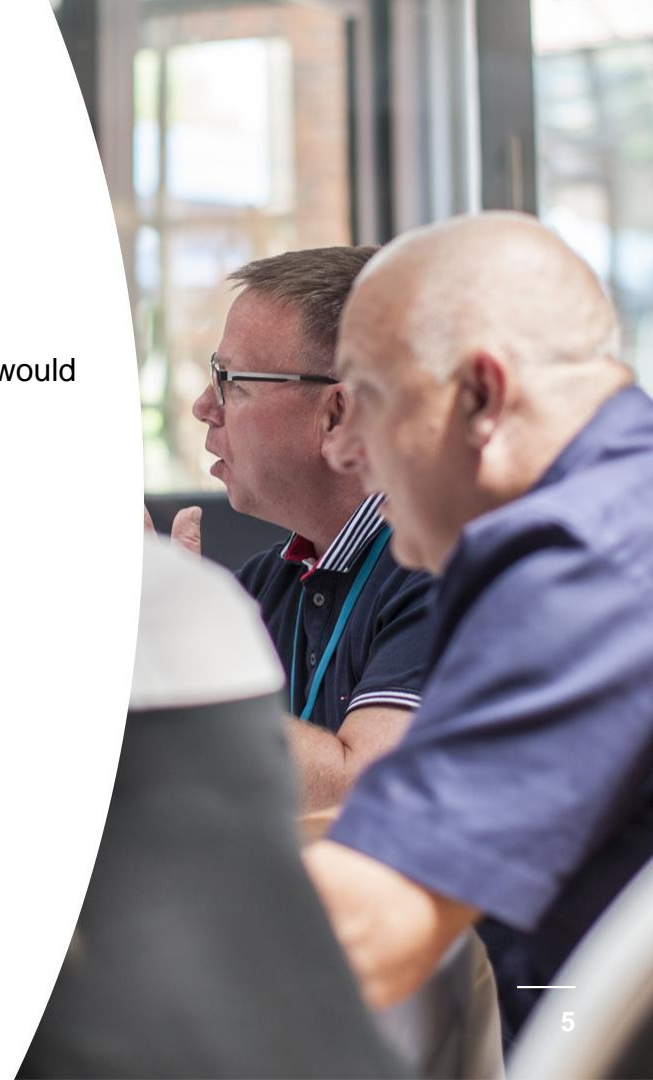
# Our BCI Score



| Survey                                      | No. of Responses      |
|---|-----------------------|
| <b>Finance</b>                              | <b>83.01% (54/65)</b> |
| Finance                                     | 90.90% (50/55)        |
| Small Companies Average, Accreditation 2024 | 81.98%                |

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# **Internal Strategic Initiatives**

## Our Top 15 most highly correlated questions

| Most highly correlated questions  | Pearson Correlation |
|---|---------------------|
| My manager cares about how satisfied I am in my job                                     | 0.836               |
| My manager takes an active interest in my wellbeing                                     | 0.819               |
| My manager does a lot of telling but not much listening                                 | 0.786               |
| 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               |

| Key                    |
|------------------------|
| Managerial Engagement  |
| Organisational Clarity |
| Engagement Questions   |

## Organisational Clarity Questions vs Benchmarks (1 of 2)

| Question   |
|--|
| I have confidence in the leadership skills of the senior management team               |
| The leader of this organisation runs this organisation based on sound moral principles |
| This organisation is run on strong values / principles                                 |

| Team Member<br>(30) |                               |
|---------------------|-------------------------------|
| vs. Feb-24          | vs. Ones to Watch Cos 2024 TM |
| 3                   | 5                             |
| 0                   | 2                             |
| 2                   | 1                             |

| Supervisor<br>(12) |                                 |
|--------------------|---------------------------------|
| vs. Feb-24         | vs. Ones to Watch Cos 2024 TL/S |
| -7                 | -5                              |
| -5                 | 2                               |
| 3                  | 7                               |



## Organisational Clarity Questions vs Benchmarks (2 of 2)

| Question   |
|--|
| I have confidence in the leadership skills of the senior management team               |
| The leader of this organisation runs this organisation based on sound moral principles |
| This organisation is run on strong values / principles                                 |

| Manager (7) |                                 |
|-------------|---------------------------------|
| vs. Feb-24  | vs. Ones to Watch Cos 2024 Mgr. |
| 11          | 3                               |
| 9           | 0                               |
| 13          | 7                               |

| Senior Manager (5) |                               |
|--------------------|-------------------------------|
| vs. Feb-24         | vs. Ones to Watch Cos 2024 SM |
| -14                | -5                            |
| -8                 | -17                           |
| -2                 | -9                            |

## Managerial Engagement Questions vs Benchmarks (1 of 2)

| Question  |
|---|
| My manager cares about how satisfied I am in my job                                     |
| My manager takes an active interest in my wellbeing                                     |
| My manager does a lot of telling but not much listening                                 |
| My manager cares about me as an individual  |
| Sometimes I feel that my manager takes advantage of me                                  |
| My manager would be quick to respond if I showed signs of being under too much pressure |

| Team Member<br>(30) |                                  |
|---------------------|----------------------------------|
| vs. Feb-24          | vs. Ones to Watch Cos<br>2024 TM |
| -7                  | -14                              |
| 0                   | -5                               |
| 5                   | -5                               |
| 3                   | -4                               |
| -2                  | -2                               |
| 10                  | 2                                |

| Supervisor<br>(12) |                                    |
|--------------------|------------------------------------|
| vs. Feb-24         | vs. Ones to Watch Cos<br>2024 TL/S |
| -2                 | -12                                |
| -7                 | -6                                 |
| -8                 | -13                                |
| -3                 | -10                                |
| -9                 | -5                                 |
| -7                 | -15                                |

## Managerial Engagement Questions vs Benchmarks (2 of 2)

| Question  |
|---|
| My manager cares about how satisfied I am in my job                                     |
| My manager takes an active interest in my wellbeing                                     |
| My manager does a lot of telling but not much listening                                 |
| My manager cares about me as an individual  |
| Sometimes I feel that my manager takes advantage of me                                  |
| My manager would be quick to respond if I showed signs of being under too much pressure |

| Manager (7) |                                 |
|-------------|---------------------------------|
| vs. Feb-24  | vs. Ones to Watch Cos 2024 Mgr. |
| 0           | -4                              |
| 0           | -2                              |
| -3          | -10                             |
| 2           | -4                              |
| 4           | -6                              |
| 3           | -2                              |

| Senior Manager (5) |                               |
|--------------------|-------------------------------|
| vs. Feb-24         | vs. Ones to Watch Cos 2024 SM |
| -15                | -23                           |
| -13                | -21                           |
| -12                | -14                           |
| -21                | -21                           |
| -6                 | -20                           |
| 5                  | -15                           |

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## Question

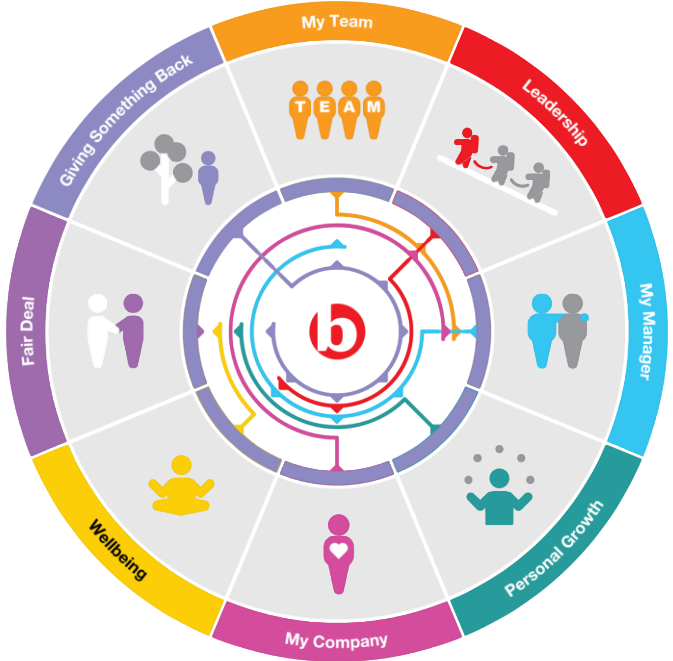
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# The 8 Factors and the Impact on Organisational Health



## Our 8 Factor scores

| Benchmark                       | Factors |    |     |    |    |    |    |     |
|---------------------------------|---------|----|-----|----|----|----|----|-----|
|                                 | MT      | L  | MM  | MC | PG | WB | FD | GSB |
| Vs Feb-24 BCI                   | -7      | -2 | -5  | 2  | 0  | 5  | -1 | 5   |
| Vs Ones to Watch Companies 2024 | -1      | 0  | -13 | 3  | 0  | -3 | 5  | -3  |



## Factors we can influence

| Benchmark                       | Factors |    |     |    |    |    |    |     |
|---------------------------------|---------|----|-----|----|----|----|----|-----|
|                                 | MT      | L  | MM  | MC | PG | WB | FD | GSB |
| Vs Feb-24 BCI                   | -7      | -2 | -5  | 2  | 0  | 5  | -1 | 5   |
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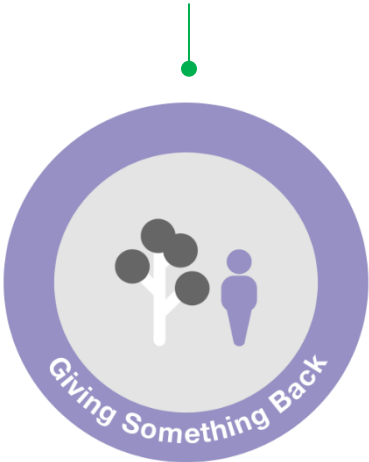
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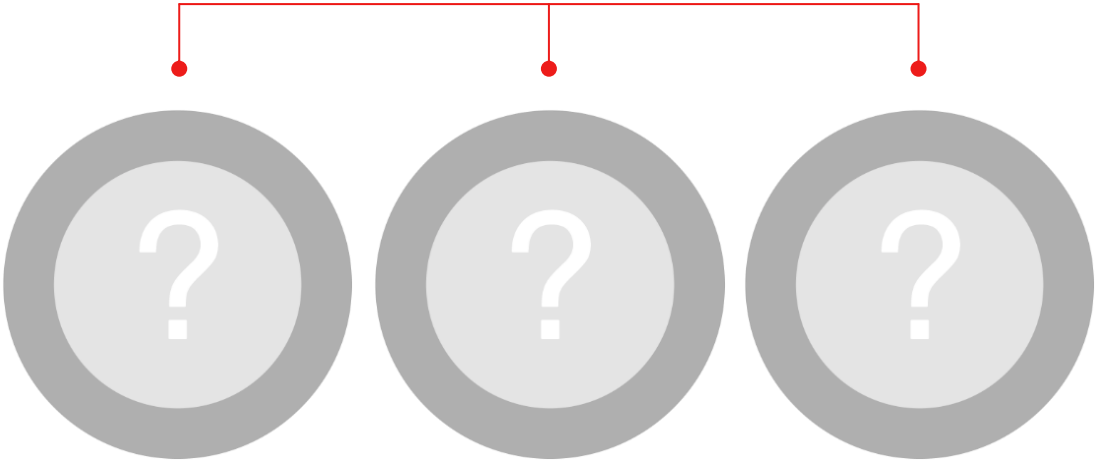


# Our Factor to Celebrate

Factor to Celebrate



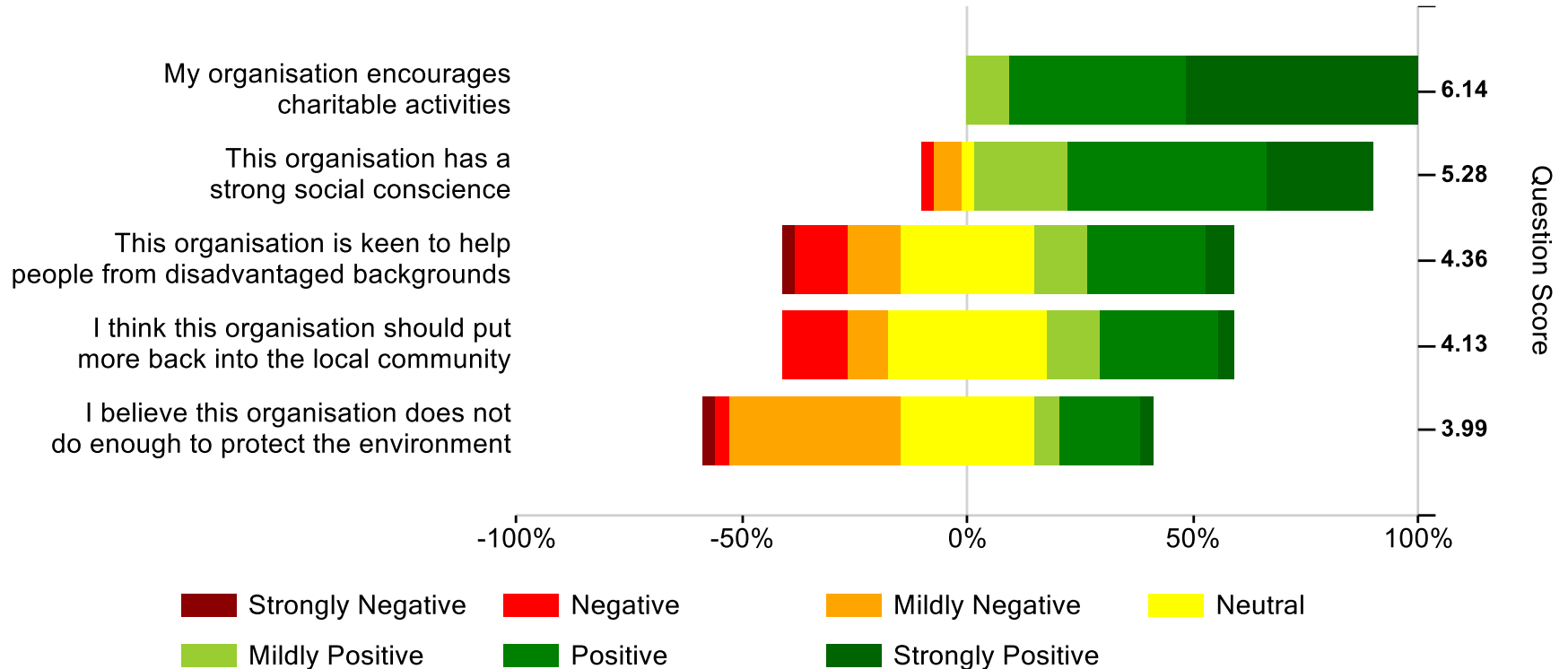
3 Factors for Improvement



## Our factor to celebrate

| Benchmark                       | Factors |    |     |    |    |    |    |     |
|---------------------------------|---------|----|-----|----|----|----|----|-----|
|                                 | MT      | L  | MM  | MC | PG | WB | FD | GSB |
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| Vs Ones to Watch Companies 2024 | -1      | 0  | -13 | 3  | 0  | -3 | 5  | -3  |

# Giving Something Back Heatmap



# Breakout Groups

**Group  
1**

Insert names here

**Group  
2**

Insert names here

**Group  
3**

Insert names here

**Group  
4**

Insert names here

**Group  
5**

Insert names here

## Task

Share examples of where the organisation has enabled people to give something back to the local and wider community



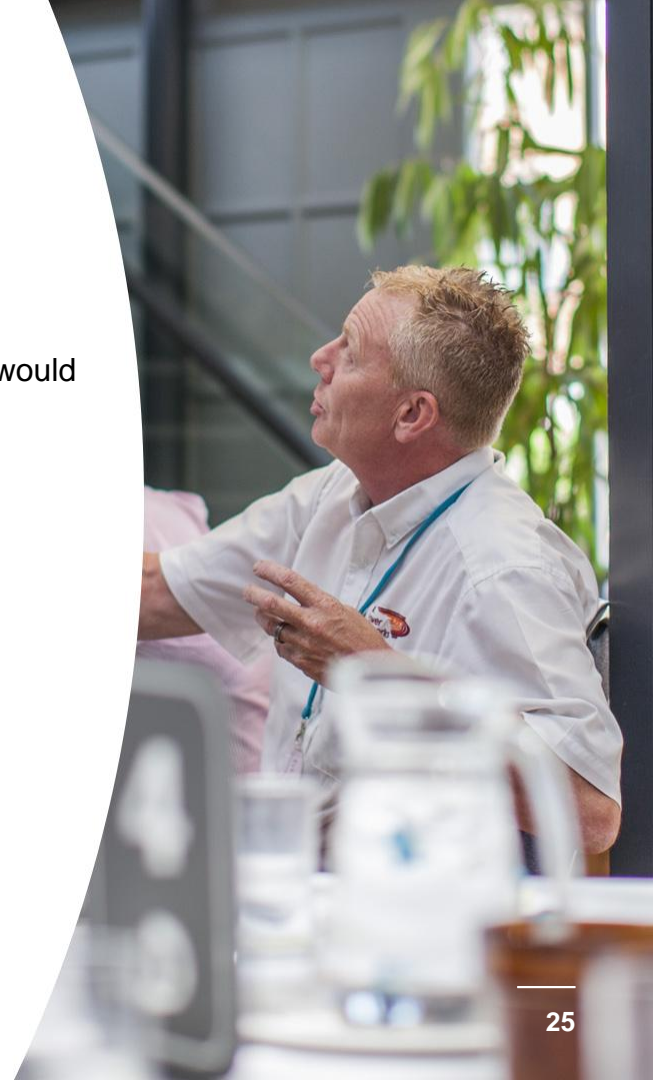
## Question

What are the policies and practices in place that have allowed us to give something back to the local and wider community?



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## Feedback

Share examples of where the organisation has enabled people to give something back to the local and wider community

What are the policies and practices in place that have allowed us to give something back to the local and wider community?

A background image showing three glass beverage dispensers on wooden blocks. The dispensers are filled with water and lemon slices. The foreground dispenser is labeled 'WILNER EST 1842 Original'. A large red circle is overlaid on the left side of the image, containing the text 'Refreshment Break'.

# Refreshment Break

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## Our 8 Factor scores

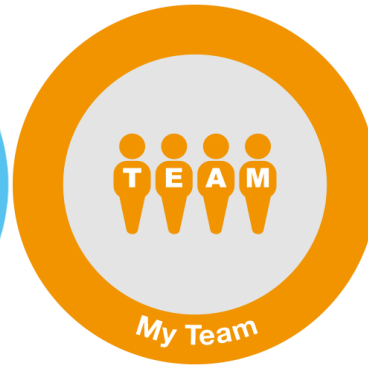
| Benchmark                       | Factors |    |     |    |    |    |    |     |
|---------------------------------|---------|----|-----|----|----|----|----|-----|
|                                 | MT      | L  | MM  | MC | PG | WB | FD | GSB |
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# Our 3 factors to improve

Factor to Celebrate



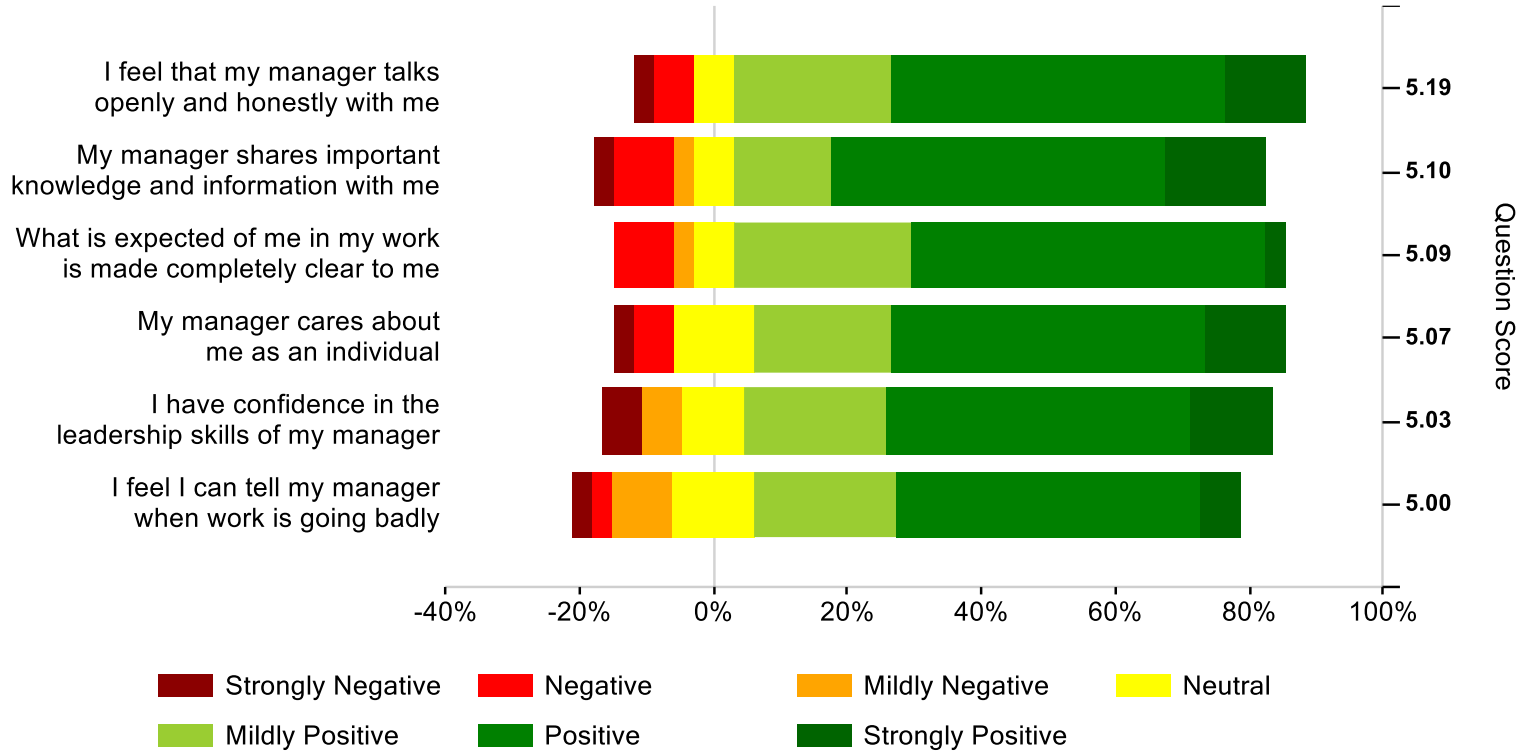
3 Factors for Improvement



## Our 3 factors to improve

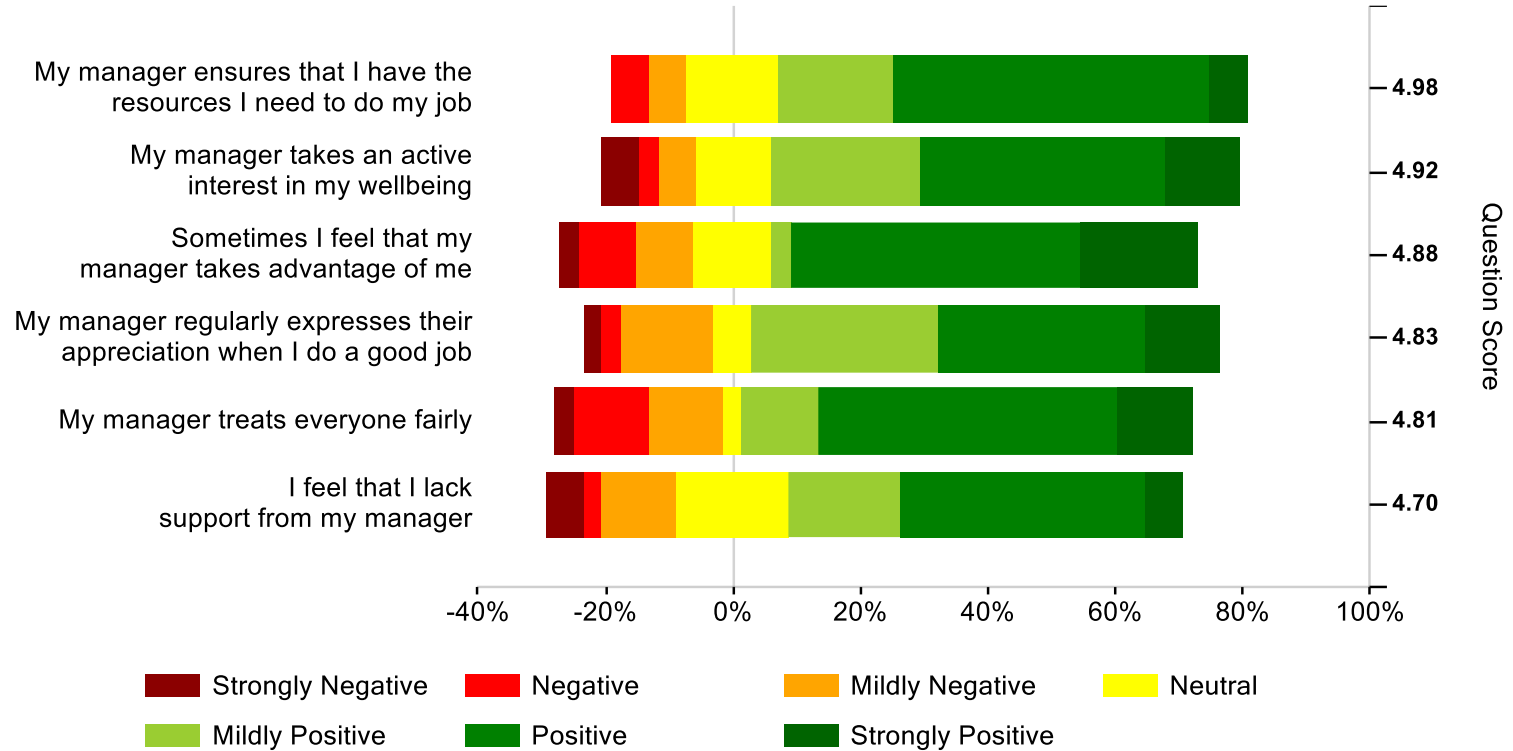
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# My Manager Heatmap (1 of 3)

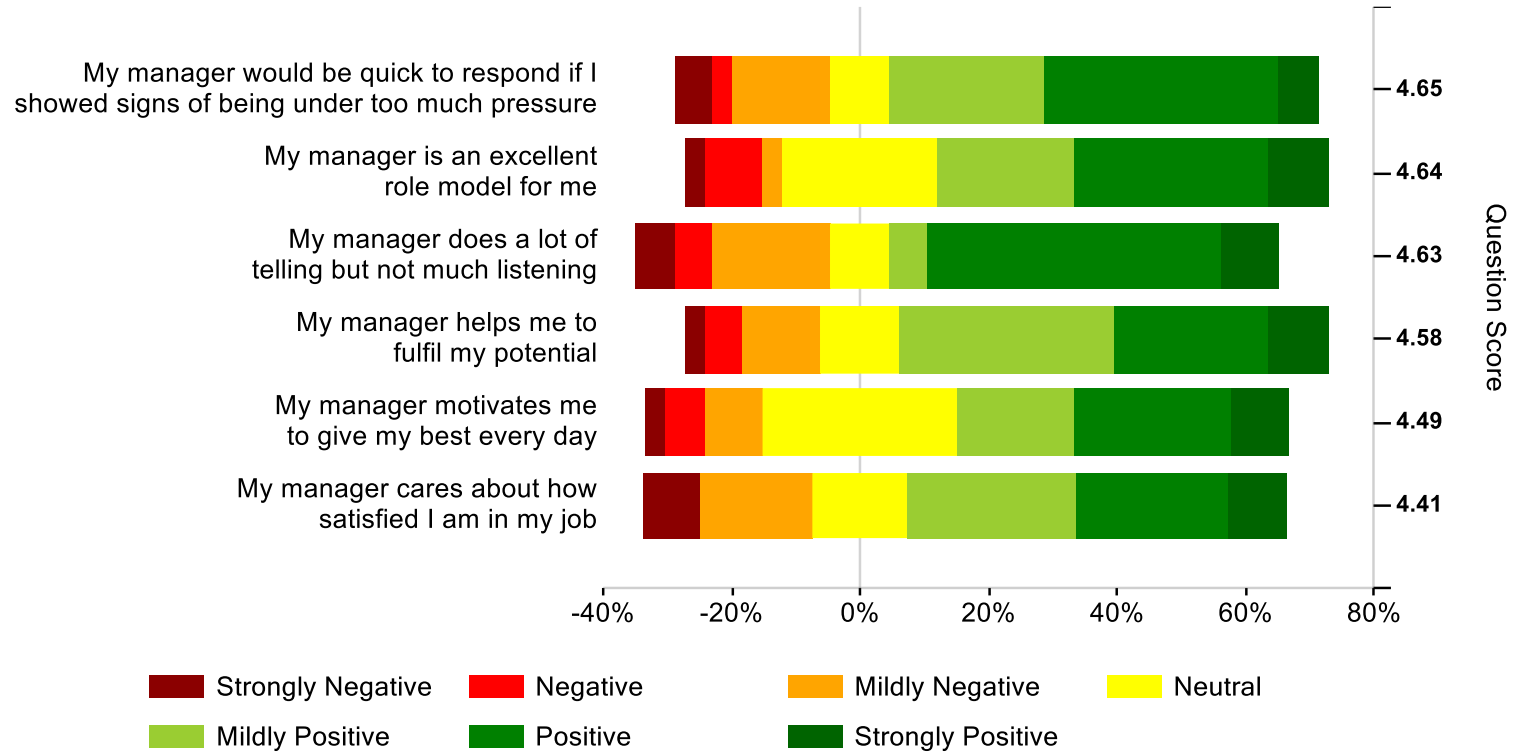




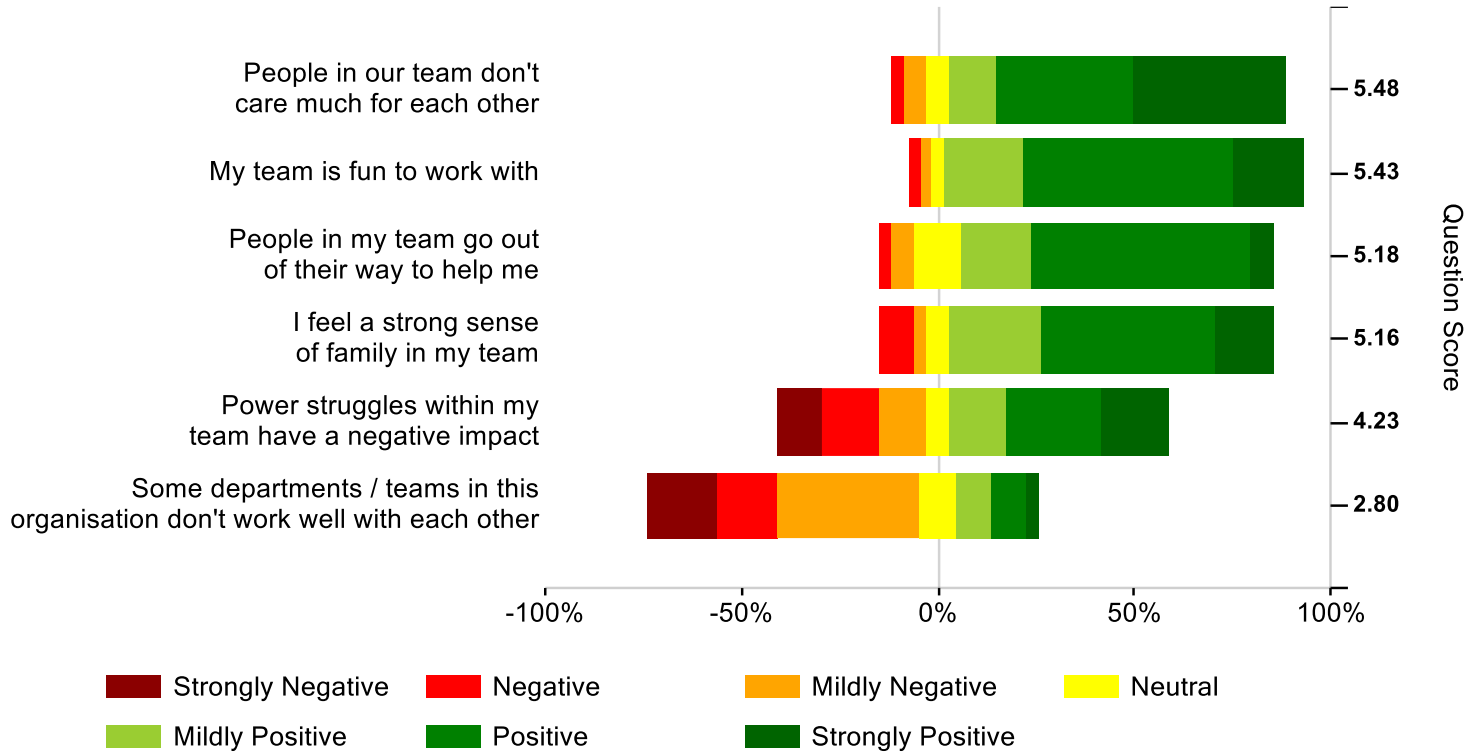
## My Manager Heatmap (2 of 3)



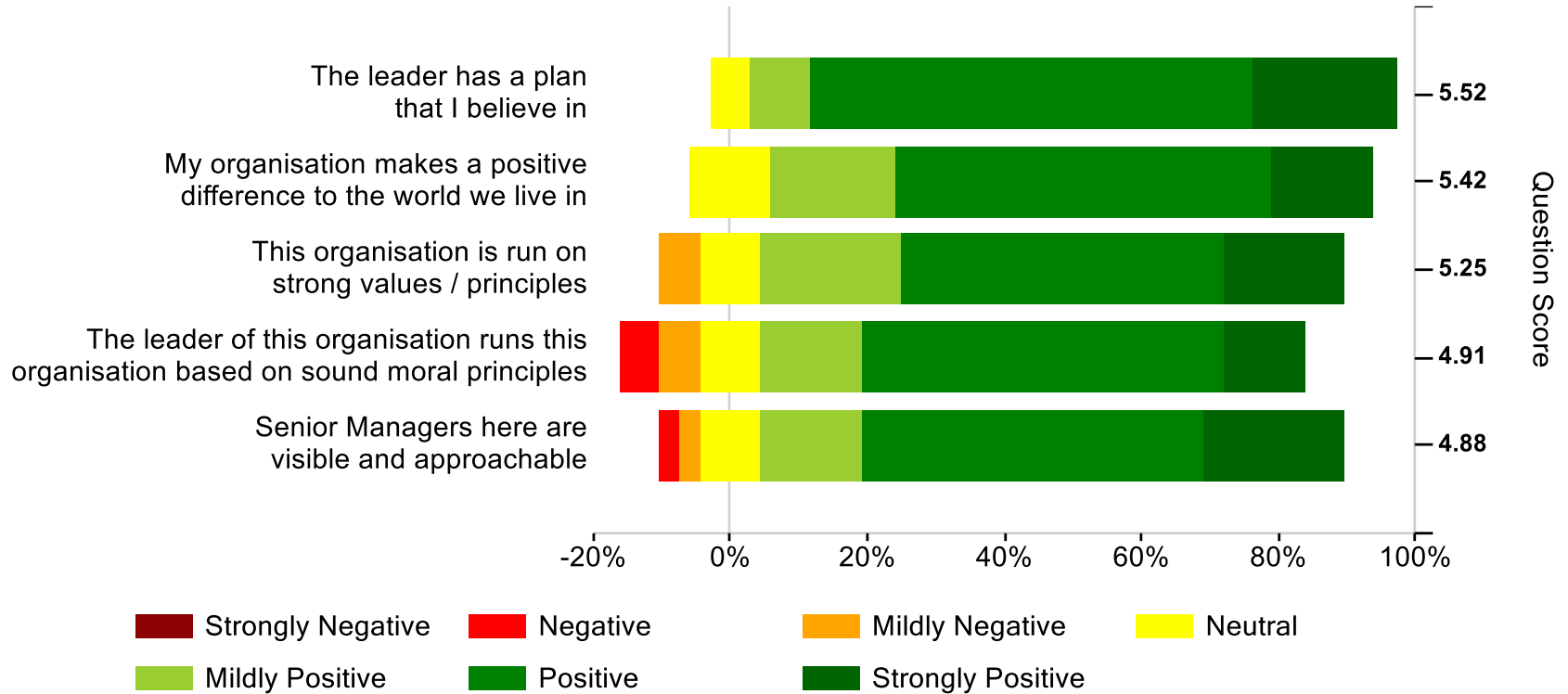
## My Manager Heatmap (3 of 3)



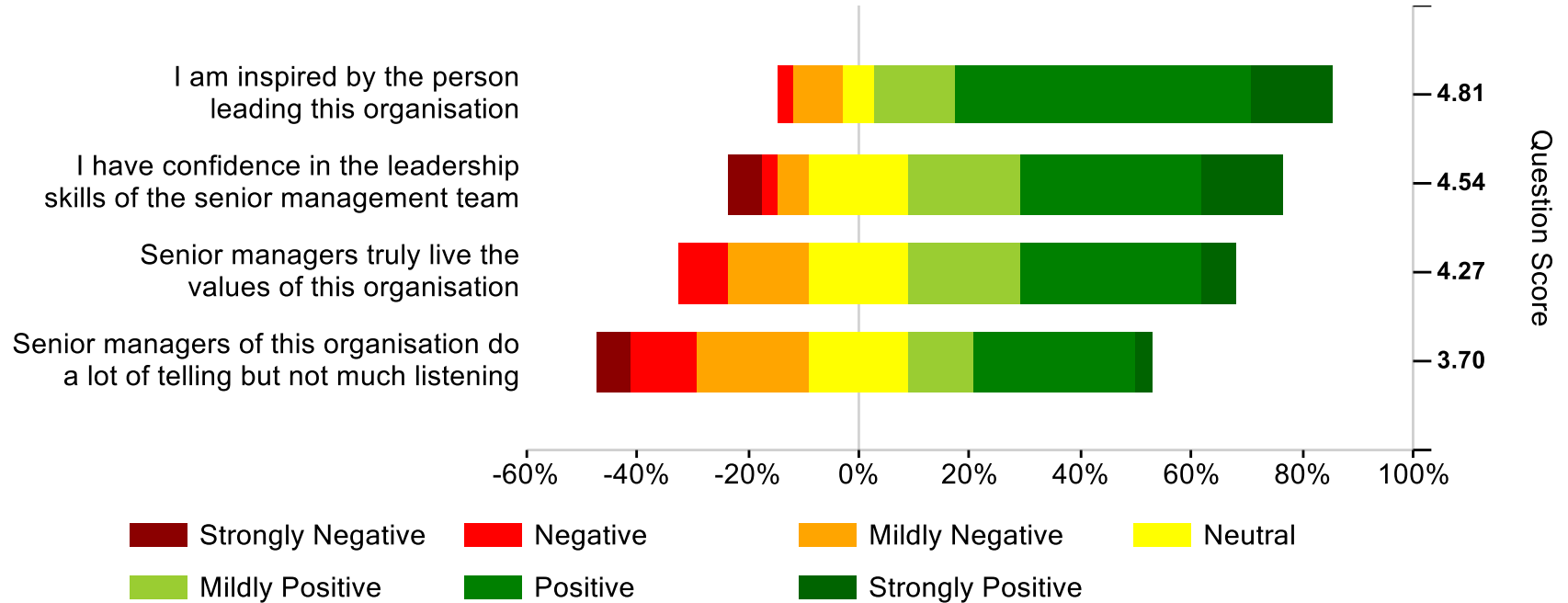
# My Team Heatmap



# Leadership Heatmap (1 of 2)



## Leadership Heatmap (2 of 2)





**Desired  
Outcome**

**Current  
Reality**

## 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

What would you need to believe about your prospective line Manager to want to work with them?

# Breakout Groups

A

B

C

D

E



# Breakout Groups

**A**

**My Manager**

**B**

**My Team**

**C**

**Leadership**

**D**

**My Manager**

**E**

**My Team**

## Desired outcome –

- ✓ Language in the present tense  
“We have achieved XYZ”  
“We are now .....
- ✓ Should cover all areas of the factor
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## Current reality –

- ✓ Tell it like it is, a really honest picture of where we are now
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Write your desired outcome here in the present tense, as though it has already been achieved

Desired outcome:

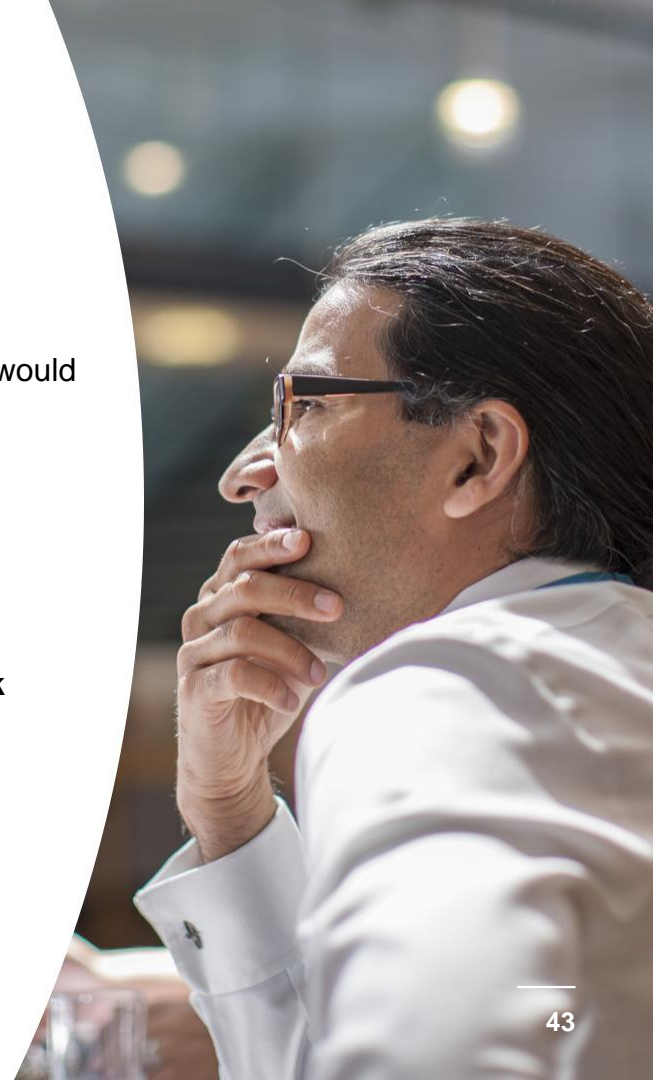
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# Activity feedback

Factor

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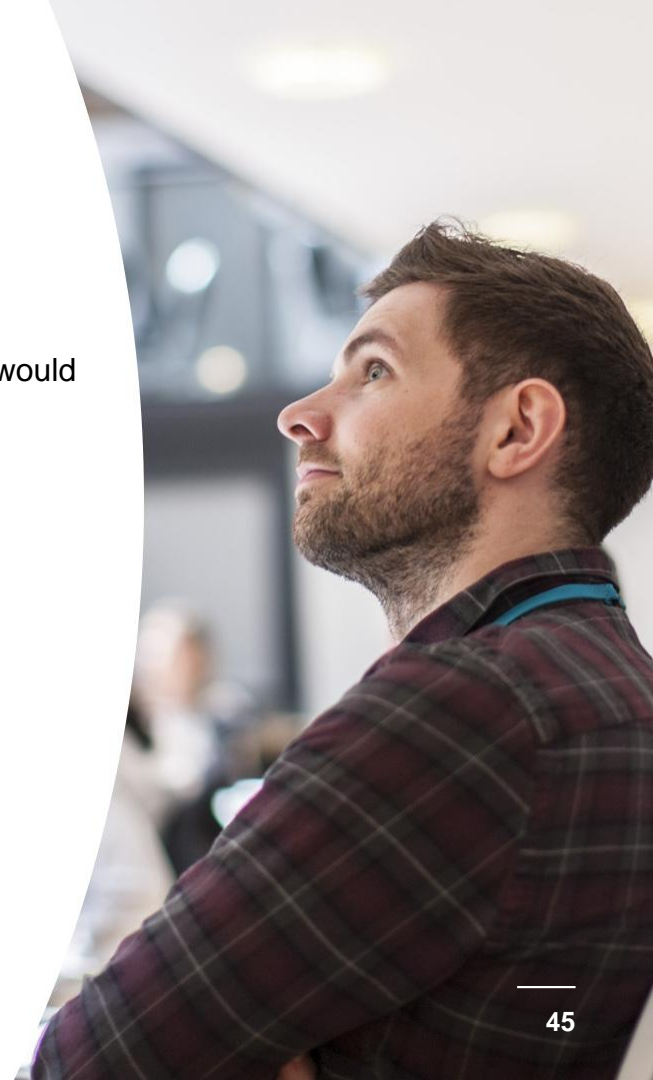
Desired outcome:



Current reality:

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# 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:

\_\_\_\_\_

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# Activity feedback

Factor

Desired outcome:



Current reality:



# In Summary

Factor to Celebrate



3 Factors for Improvement



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## Next steps



1

Generate a piece of best practice around Giving Something Back

2

Management to review current reality/ desired outcome work and feedback to department

3

It's everyone's responsibility to drive change – we will be looking for champions to track progress on the action points

A woman with long brown hair, wearing a grey cardigan over a blue shirt, is smiling warmly. She is in an office environment, with a computer monitor visible in the background. A large, solid red circle is overlaid on the left side of the image, partially obscuring the background. The text "Thank you" is centered within this red circle.

**Thank you**