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Four Steps to Creating Engagement Every Day



by Jake Herway and Jeremy Pietrocini

Gallup research shows that for a few select managers, naturally engaging their teams to be their best every day comes so instinctively they don't even realize they're doing it. But there is hope for the rest of us to practice until engagement does become natural.

Top teams that address engagement needs in their everyday work outperform bottom teams by an average 20% in sales and 10% in customer engagement, making it a worthy pursuit.

A closer look at a real-world example might help managers and employees see how to apply engagement in their everyday work. The following represents the specific ways a financial advisory team I work with used the Gallup Q¹²

employee engagement assessment and a focus on using team members' strengths to integrate engagement into the team's overall performance.

The team first focused on using strengths and employee engagement to improve their new-client onboarding process. Soon, they were using everyday engagement practices everywhere -- conducting their portfolio review, improving their sales and prospecting process, orienting new employees, achieving stretch goals, addressing market or product changes. Whatever they have to do together, they now do by practicing everyday engagement.

Here are the four steps they take to practice "everyday engagement":

1. The team starts by clarifying expectations, collectively answering these questions:
 - Why does the team exist? (our purpose)
 - What do we want to be known for? (our brand)
 - What do we need to change in how we work together (our culture) to fulfill our purpose and "live" our brand?

Openly discussing these questions, instead of assuming alignment, leads to a shared awareness of needed changes -- and prioritization -- of what the team expects from each other. For example, the lead financial adviser had assumed his only activity was prospecting. But when the team discussed their purpose, they determined they existed primarily to give clients financial freedom.

To achieve this broader goal, it became clear to the lead financial adviser that he needed to spend more time helping new clients onboard, not simply to transition them to other team members after signing the deal. When a corporate head later questioned the lead adviser about making onboarding a priority, the adviser pointed to his team's purpose and the differentiated brand they were creating with these priorities -- not to mention the

increases in collaboration, information sharing and solidarity among team members. Further, he showed how his new onboarding focus had uncovered new business opportunities. Ultimately, the team was achieving new business success with exactly the same people and products they had before.

2. The team recognizes the unique strengths team members can use to help them reach their goals.

The team then reviews their collective strengths. In one instance, they noted a member had strengths that helped her to influence other people -- strengths the rest of the team lacked. A couple of team members praised her for a time she used her influencing strengths to turn around an angry client when no one else could. It wasn't until then that this individual recognized she was contributing more than she knew: She had a truly appreciated -- and rare -- talent that the team desperately needed.

3. The team arranges activities to make it possible for team members to do what they do best every day.

After that team member said she loved turning angry clients into happy ones, a colleague felt empowered to share that he was similarly energized by researching and analyzing alternative investments in a client's portfolio -- all strategic thinking talents. So they partnered: She took his client complaints; he helped her with portfolio reviews. By pursuing a strengths-based approach, they were able to avoid the resentment that typically happens when teammates think others are shirking responsibility or imposing on them. Instead, they were able to freely collaborate, knowing they were progressing toward a shared purpose of helping clients achieve financial freedom.

Naturally, the lead financial adviser was happy to see an immediate increase in employee engagement and efficiency because work was done better, faster and with

more flow. He suspected -- accurately, as it turned out -- that the flow these two teammates got from working in their strengths would translate directly to more engaged, energized clients. No change in people or product -- only an increase in business.

4. Finally, the team focuses on making sure everyone has what they need to succeed.

After team members have a clear idea of what is expected of them, they collaborate to get the knowledge and skills they need to meet and exceed those expectations. The team member who took over client concerns based on her ability to influence others needed to develop a better understanding of product offerings and the firm's policies. In two afternoons with a seasoned teammate -- who was flattered to be asked to help -- she had all she needed to succeed.

Bottom Line

Practicing everyday engagement is management at its best. It truly empowers teams to collaborate -- to take and give responsibilities, and to free individual members to do what they do best for the benefit of the entire team. It clarifies and prioritizes expectations and celebrates each individual's contribution to a shared goal.

Some managers understand all this in the same way they breathe; it's just what they do. But for the rest of us, practicing engagement every day helps. And over time, practice will make perfect -- and perfect will become natural.

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