



## Team Facilitation/Talent Engagement – Financial Sector

### Business Context/Objectives

The client was a leading asset management company that has been through significant change over the last year. The key issues for the HR team were around attracting, engaging and retaining staff in the current climate; supporting managers and equipping them with the skills to engage their team members; while also promoting HR career development.

The organisation was keen to equip the HR team with the skills required to hold challenging conversations effectively, thereby providing beneficial guidance for their target audience at the transactional level, whilst at the same time contributing to the ongoing development of the HR team itself. HDA was invited to provide an effective development intervention, an outline of which is detailed below.

### HDA Approach

After discussions with HR to further define their key objectives, HDA decided that the best approach would be to run 2 **half-day developmental sessions**, to ensure minimum disruption to the business; while also encouraging maximum take-up.

The sessions focused on the following areas:

- Challenging Conversations and how to tackle them - the key objectives being to assist the HR team in developing a better understanding of the dynamics involved in challenging workplace communications and establishing a best practice model for use in business.
- Creating awareness and understanding of the best possible approaches to navigating through these tough times - given the changing workforce; refined organisational structures and changing leadership priorities. The key issues for both the individual participants and the HR team as whole were identified through pre-course online assessments and tips/tools for moving forwards to create successful outcomes were provided; alongside successful tactics and case studies from leading organizations.

### Business Outcomes

The session provided the team with the tools and techniques required to facilitate discussion; promote career development; and engage and motivate staff. As a result of the session the HR team developed a practical preparation strategy to become proficient in delivering difficult messages. In addition, given the changing workforce, refined organisation structures and changing leadership priorities it was important for the HR team to understand the best possible approaches to navigating through the current climate. As a result of the session the HR team were better placed to develop internal strategies for motivating and engaging staff; thereby ensuring they retain key talent when the markets pick up.

Those attending the session plan to take a number of actions as a result of the workshop, including the following:

- Incorporate learnings into leaver interviews to obtain a greater insight into employee perceptions in order to enhance engagement levels of those remaining with the organisation (HR Generalist).



- I have a better focus on the key issues for both my business unit and other key areas within the organisation – this will inform my thinking and enable me to make better decisions for not only my team but the business as a whole (Director of HR).
- I found the session very interesting and plan to review further the Karpman Drama Triangle (Senior HR Manager).



## Team Engagement - Media

### Business Context/Objectives

The client was one of the world's leading independent content providers producing news, entertainment and factual content across a range of platforms. The organisation had been through a number of changes (restructurings, redundancies and budget cuts) and are aware that staff morale was likely to be low; as such HR were keen to not only pulse test the degree to which people were engaged with the organisation and its future objectives but they were also interested in understanding what factors, if tackled, could enhance employee engagement levels.

HDA were commissioned to work with the organisation to achieve the following objectives:

- To measure employee engagement levels across the business;
- To provide information that can be used to drive general improvements in the working environment, in team motivation, morale and productivity.
- To identify specific areas of improvement that may be appropriate to particular parts of the business;
- To provide employees with an opportunity to voice their opinions freely and openly; and
- To demonstrate to employees that the organisation does care and is interested in their ideas/thoughts for the future.

HDA were invited to measure and deliver meaningful feedback on staff engagement across the organisation and identify measurable actions for the organisation to drive forward with.

### HDA Approach

HDA followed the 4 stage engagement consultancy process to achieve the organisational objectives, involving:

1. Project Analysis & Planning - a great deal of time was spent on this stage in order to fully define organisational objectives and expected outcomes. HDA worked closely with both HR and senior management to generate an optimal question set in order to measure key responses across the business. Focus groups were held with key stakeholders from across the business to gain buy-in to the process and ensure the question set was appropriate for the organisational culture and what they were trying to achieve.
2. Measurement - once the question set, FAQs and online reporting centre were in place; the survey was delivered online and in hardcopy over a period of 3 weeks.
3. Analysis, Interpretation & Reporting - HDA analysed the results and provided a comprehensive report for HR and Senior Management to review. Feedback from post-survey focus groups was also included in the final report.
4. Planning Next Steps - Following feedback sessions with the senior management team, HDA and HR worked closely to develop consistent communication templates for departmental heads to feedback to staff members. It was important for the organisation to focus results not only at a general company-wide level but also at a departmental level (where the real impact of any action would be observed). With this in mind, a general communication template was produced highlighting company-wide results on all and then drilling down to departmental results and action plans for each individual department.

## **Business Outcomes**

The survey results provided rich insights into levels of organisational engagement - including areas for enhancement and areas of success. HDA worked with the organisation to develop a clear, prioritised action plan for moving forward in order to demonstrate their commitment to the process and to enhancing employee engagement levels across the business; thereby ensuring key talent retention.

As a result of the process, departmental heads were better equipped to communicate both the negative and positive messages contained in the survey results. In communicating effectively and honestly with staff members; the departmental heads demonstrated their commitment to promoting a positive work environment where employees are included in the decisions that affect them - something which is central to enhancing employee engagement.



## Team Facilitation / Talent Engagement – Media

### Business Context/Objectives

The client is a global leader within the music industry. The organisation's HR team have monthly catch up / review meetings with approximately 30-40 people, in both temporary and junior level roles. These meetings focus on both broad and specific career development / life-skills discussions, with a view to driving continuous improvement within the organisation. In these discussions the HR team are frequently asked to provide careers and CV advice.

The organisation were keen to equip the HR team with the skills required to hold these conversations effectively, thereby providing beneficial guidance for their target audience at the transactional level, whilst at the same time contributing to the ongoing development of the HR team itself – in particular the development of their own coaching self-awareness and skills. HDA was invited to provide an effective development intervention, an outline of which is detailed below.

### HDA Approach

After discussions with HR to further define their key objectives, HDA decided that the best approach would be to run a **half-day developmental event**, facilitated by a HDA consultant who both has significant experience working with HR teams to enhance their performance, and who is also an expert on how individuals at all levels can best enhance their personal career prospects. The session focused on the following areas:

- CV Writing - focusing on principle questions that need to be answered, best practice and example CVs;
- Interview Preparation - focusing on knowing about the interview/job, key questions individuals should ask, typical questions they may be asked, the importance of having YOUR story, tools for answering these questions;
- Effective Networking & Personal Branding - why it is important? How to? Tools for effective networking, assessing and enhancing your personal brand; and
- Coaching **skills development** - focusing on what exactly coaching is, Active listening, GROW model, Giving/receiving feedback, stakeholder analysis.

### Business Outcomes

As a result of the career development session, the HR team are better equipped to hold career review/career development type discussions with staff. The session provided the team with the tools and techniques required to facilitate discussion; promote career development; and engage and motivate staff. In addition, the HR team themselves are more engaged with the prospect of introducing a coaching approach to their discussions, guiding and enabling as opposed to directing staff; thereby creating a culture of career ownership amongst staff members.



Those attending the session plan to take the following **actions** as a result of this workshop:

- Enable people to think more about their personal branding;
- Use the tools provided in the workshop and apply these to real people development situations;
- Increase the use of questioning and encourage candidates to undertake self assessments when discussing career direction; and
- Avoid just 'telling' people what they can do and coach them into thinking about what it is they really want and how perhaps they feel they can get there.



## Team Engagement – Media

### Business Context/Objectives

The client is an international channel brand of a music entertainment network - it is an innovative organisation that has a fantastic reputation both within the media world and externally.

As part of a wider corporate engagement project undertaken by HDA, the organisation were also interested in measuring how people were currently feeling about the business and their workplace, particularly as they had experienced a period of stability, sustained growth and great success during the year. HDA were commissioned to work with the organisation to achieve the following objectives:

- To ensure that all employees are motivated and engaged;
- To provide an opportunity for company-wide Involvement and honest communication;
- To provide information that can be used to drive general improvements in the working environment, in team motivation, morale and productivity.
- To identify specific areas of improvement that may be appropriate to particular parts of the business or groups of people; and
- To capture and nurture the ideas of the many creative minds working within the organisation

HDA were invited to measure and deliver meaningful feedback on staff engagement across the organisation and identify measurable actions for HR to drive forward with.

### HDA Approach

HDA worked with the organisation to generate an optimal question - identifying qualitative and quantitative questions from both the HDA question bank and also newly developed organisation specific questions, in order to measure key responses across the business. The questions were framed under the HDA 9 box model which seeks to measure engagement across the following 9 areas:

- Processes
- Role challenge
- Values
- Work-life balance
- Information
- Rewards & Recognition
- Management
- Work Environment
- Products

The HDA survey was conducted online. An FAQ link was set up for respondents and also an online reporting centre for the corporate client so they could track responses received by department. The survey was undertaken

for a 2 week period and a 100% response rate was achieved – this excellent response rate demonstrates the organisations commitment to the survey and acting on the results.



## **Business Outcomes**

The survey results provided rich insights into levels of organisational engagement, and guidance was provided by HDA for the organisation to independently move forward to enhance engagement levels across the business by focusing on both success areas and areas for improvement at a departmental level. The organisation developed an action plan for moving forward including a regular review of actions taken and outcomes achieved in order to demonstrate their commitment to the process and to enhancing employee engagement levels across the business; thereby ensuring key talent retention.



## Team Facilitation / Talent Engagement – Media

### Business Context/Objectives

The client is a US based music entertainment network with a growing UK and European operation. The organisation has a fantastic reputation and is a brand that few would not want to be associated with it, whether outside or inside the organisation.

The organisation had experienced a period of relatively rapid change and the leadership team, driven by HR, was keen to measure how people were currently feeling about the business and their workplace in the hopes of identifying both areas for improvement and areas of success; thereby demonstrating their sustained commitment to continuous improvement within the business. HDA were commissioned to work with the organisation to achieve the following objectives:

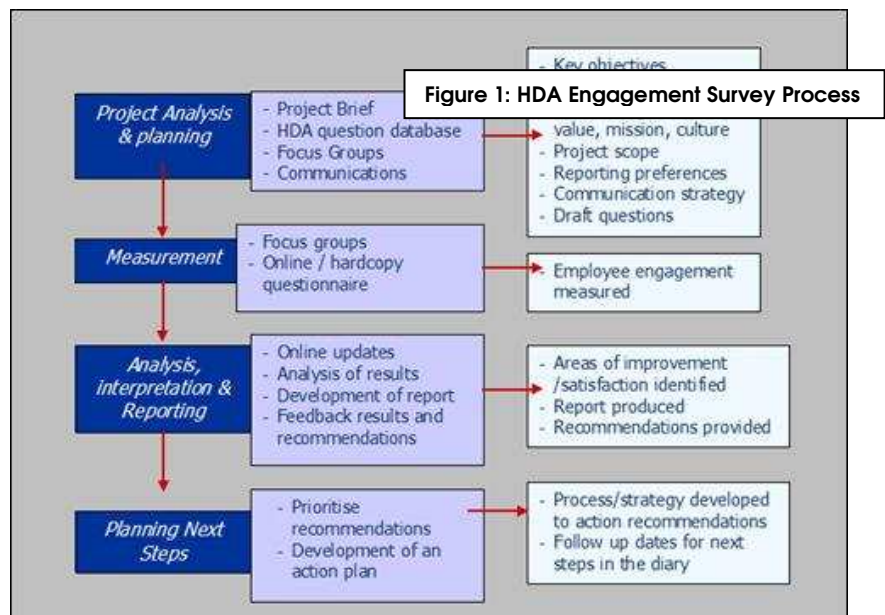
- To provide a snapshot of the way that people across the organisation felt about their workplace and the company;
- To provide an opportunity for company-wide Involvement and honest communication;
- To provide information that could be used to drive general improvements in the working environment, in team motivation, in morale and in productivity to assist with ensuring talent is retained;
- To capture and nurture some of their ideas of the many creative minds working within the organisation to identify specific areas of improvement that could be appropriate for particular parts of the business or groups of people; and
- To comply with *Health & Safety Executive guidelines*.

HDA were invited to measure and deliver meaningful feedback on staff engagement across the organisation and identify measurable actions for the leadership team and HR to drive forward with.

### HDA Approach

HDA followed their typical survey process (see figure 1) beginning by working with the organisation to further refine their key objectives for measuring engagement and defining the scope of the survey. Then an optimal question set was generated - identifying qualitative and quantitative questions from both the HDA question bank and also newly developed organisation specific questions, in order to measure key responses across the business. The questions were framed under the HDA 9 box model which seeks to measure engagement across the following 9 areas:

- Processes
- Role challenge





- Work-life balance
- Information
- Rewards & Recognition
- Management
- Work Environment
- Products

The HDA survey was conducted both online and in hardcopy. An FAQ link was set up for respondents and also an online reporting centre for the corporate client so they could track responses received by department. HDA also worked closely with Internal Communications to develop an effective communication strategy for rolling on the survey, the results and the recommendations. The survey was undertaken for a 2 week period and a 68% response rate was achieved. Following analysis of the results a comprehensive report was prepared and the summary findings presented to the leadership team and HR. Subsequently, HDA also presented the findings and recommendations to the wider senior management group who then delivered the feedback to the general staff at a departmental level.

## **Business Outcomes**

The survey results not only determined where the organisation were placed in terms of the HSE Standards but also provided rich insights into organisational engagement, and guidance was provided by HDA for the organisation to independently move forward to enhance engagement levels across the business by focusing on both success areas and areas for improvement at a departmental level.



## Engaging Internal Stakeholders – Automobiles Industry

### Business Context

The organisation brand has a fantastic reputation, (innovation, integrity, sustainability...the list goes on...) and few would not want to be associated with it, whether outside or inside the organisation.

The organisation's Europe, UK and Finance Europe divisions experienced a major organisational restructure in 2006/7 as part of a general rationalisation of the region, and HDA partnered with them through this process to manage the people component of the change process.

The positive effects of any organisational transition always go hand in hand with a degree of fear for the future within an organisation, resistance to change where that change is not well understood, or not considered valid, and possible disengagement with the objectives of the organisation. This has potential to impact team morale, performance and subscription to organisational values and forward strategy.

Whilst the organisation restructuring was handled particularly well, in accordance with an organisation which was proud to be voted in the top-40 **Sunday Times 100 Best Companies to Work For** organisations between 2003 to 2006, and despite excellent results achieved in 2003,4,5 from the organisation's own internal European 'Spirited Independence' survey, the organisation's leadership nevertheless believed that a targeted survey of engagement levels across the organisation, post transition, would be an essential initiative to positively take the business forward with firm commitment to agreed principles after a brief period of dissonance.

### HDA Project

HDA and the organisation communicated the objectives of the engagement measurement process to associates and contractors under the following key headlines:

- We are setting out to 'pulse test' the degree to which people across the organisation are 'engaged' with the objectives of the organisation, and the degree to which there are any specific factors across the organisation which need to be managed to improve Associate engagement levels.
- We are aware that there are many creative minds working within the organisation and this survey provides the opportunity to capture and nurture some of your ideas.
- We are keen to identify manageable issues which can be constructively dealt with – despite the organisation conducting regular internal surveys, we are not about measuring opinion, or creating metrics, or creating benchmarks(\*) in the first instance, but, rather, we want to get a feel for how engaged people are with the objectives of the organisation during 2007 and moving forward, (with specific reference to the organisation's 84ki strategy). (\*Bearing in mind that any internal engagement benchmarks will of course be referenced in future surveys by the organisation)
- For this reason, the survey process is not overly complex, and it is intended that the results of the survey are capable of being followed up in a managed, systematic fashion

- We want to place ourselves in a position to comprehensively manage reasonable continuous improvement in the organisation, based on survey outcomes



**Our Objective then was to measure and *deliver meaningful feedback on Associate engagement across the organisation, diagnose the real situation, and take measurable actions to continuously improve the organisation.***

## The Project

HDA worked with the organisation to identify an optimal question set to measure key responses across a number of key components of the business, including, views on:

- How easily things get done
- Satisfaction with role
- Values
- Work-life balance
- Information
- Rewards & Recognition
- Management
- Work Environment
- Products and Service

The HDA survey was conducted 100% online across the UK and Finance Europe divisions under a general '**More Forwards**' theme, and included all Associates and contractors.

Both quantitative and qualitative questions were included; the latter adding rich verbatim accounts of life within the organisation.

Whilst participation was on a strictly voluntary basis, 85% of the UK division and targeted the Europe division's Associates and contractors participated in the survey, and 89% of the Finance Europe division's Associates and contractors participated. This very pleasing response rate was driven by a highly transparent process and committed communication within the organisation.

## Results

The survey results provided rich insights into levels of organisational engagement, and guidance was provided by HDA for the organisation to independently move forward as follows:

1. Agree a Strategic Response to the Survey:

- with regards to talent attraction,
- with regards to talent engagement,
- with regards to talent retention,
- with regards to a sensible *combination* of these, in line with existing strategies in these areas

2. Acknowledge the most likely Associate engagement opportunities and threats for the organisation as a whole and focus managerial attention on these.

3. Agree on areas that are commercially out-of-bounds.



4. Identify potential 'quick wins'.

5. Openly communicate company-wide survey outcomes with the Associate team, and agree a manageable mechanism for tracking 'More Forwards' progress against those outcomes which the organisation believes are manageable.

6. Engage a cross-functional team to consider implications of the survey, and opportunities for addressing company-wide issues via intelligent quick wins which are indicative of positive intent around the '**More Forwards**' theme.

7. Identify any demographic exceptions of interest / concern, assess and manage these.

Whereas many organisations undertaking staff surveys set out to benchmark themselves against other organisations and within sectors, with little context as to why results across different organisations may be different; HDA strongly discourages organisations it partners with from taking this largely academic approach where the survey itself is seen as the end in itself, rather than a means to a more valuable end which *commits* the organisation's leadership to transparently act on the results of any survey conducted, given the commitment that respondents are putting into participating in the survey.

One of HDA's key themes therefore in working with the organisation, was that the organisation should seek to identify and feed off of **internal benchmarks** for the organisation – ie. engagement exemplars for the organisation as a whole, whether these be at business unit level, at departmental level, or whether these exemplars are located within a specific demographic group, eg. *short-service staff within customer services with less than 2 years' service*, etc.

On this basis, HDA identified a number of exemplars of notably high engagement levels within the organisation, including within the UK division's Press & PR and Customer Service (Cars), the Finance Europe division's New Business & Customer Service and HR Operations. The organisation was encouraged to consider what qualities stand out in these areas across the engagement components measured, and to feed any internal learnings from this process across the organisation.

The organisation has gone on to transparently address key issues identified by the survey process, with reference back to the survey, and it is envisaged that the process will be replicated.

## Employee Engagement and Key Skills Retention in a High-Speed Environment - Technology

### Background

A rapidly changing technology company had delayed its commercial launch in the UK given software development delays. The business's investors were keen to keep the organisation fully engaged, within a highly constrained budget:

- Developing its world-first technology at high speed for an accelerated launch within the next four months,
- Retaining key technology skills and expertise within the business,
- Developing global partnerships,
- Ensuring that its intellectual property was protected,
- Ensuring that key quality processes were introduced,
- Ensuring that a new CEO was hired within the next 3 months
- Ensuring that cash spend was maintained at X, despite high levels of commercial activity

Given these objectives, the company demanded a lot from its people, (eg. the London office was often almost fully staffed two or three hours after the close of "normal business hours" for at least the first year after funding, as a "normal" day's work could not fit into a typical 8-hour day. It was also the norm to "find" Palo Alto colleagues online, completing their previous day's work at 10 or 11 a.m. each morning).

The company also had very little to offer people as a lean venture capital funded company, other than a future stake in the company (via stock options), and via actively seeking opportunities to leverage careers by encouraging people to get involved in areas of the business that they would not typically get involved in within more established businesses (Notwithstanding the fact that, for the most part, people in new or newly restructured organisations are often required to spend much of their time working well within their capabilities, ensuring that the basics are done within the constraints of the situation, without the typical levels of support available within established companies).

### HDA Intervention

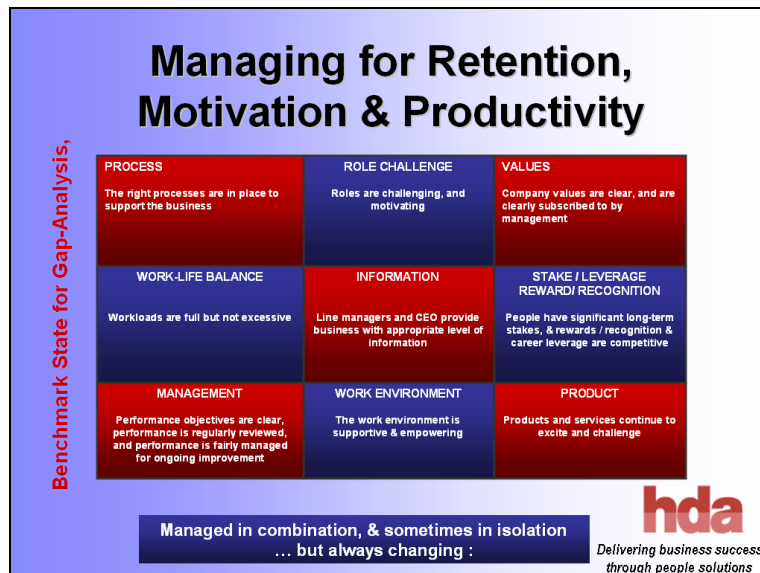
An internal, holistic survey was conducted on all staff across the organisation, both in the UK and the USA. The survey measured the following predictors of team satisfaction:

- Process – are the right processes in place to support the business?
- Role Challenge – are roles challenging and motivating?
- Values – are company values clear, and are they clearly subscribed to by management?
- Work-life balance – are workloads full but not excessive?
- Information – do senior managers provide the business with an appropriate level of information?
- Stake/Leverage/Reward/Recognition – do people have significant long-term stakes in the business, and are rewards, recognition and career leverage opportunities with the organisation competitive?
- Management – are performance objectives clear, and is performance regularly reviewed and fairly managed for ongoing personal improvement?
- Work Environment – is the work environment supportive and empowering?
- Product - do solutions, products and services continue to excite and challenge?



Detailed and headline feedback results were then systematically used over the next six months as a key driver for:

- Facilitated objective-setting
- Management meeting actions
- Management interventions
- Process adjustments
- Company meeting agendas



## Results

The process was repeated after 6 months, and again six months later, with focus on continuous improvement in all measures, and the facilitation of change where operational and managerial weaknesses were identified. As expected, improvements in certain measures, impacted negatively on others.

During the 18 month period the company successfully launched its technology in the UK and in Germany, and licenced its technology in Japan, whilst extending its cash reserves for four months longer than budgeted. During the period, the company experienced only one resignation (in the US), and was considered to be very stable, despite its various financial constraints, the marketability of the talent within the organisation, and significant differences of opinion across the organisation about future directions of the business.

The management team agreed that managing within a clearly defined framework for measuring the team's temperature, and for informing management team actions, (followed by concrete - and clearly communicated - responses to areas of weakness) was a useful approach to setting the agenda for managing the key people component of the business within a highly constrained environment; specifically:

- key skills retention,
- intellectual property protection, and
- optimization of employment costs
- development of quality culture