

# Engaging one on one

01

## Find a friend

Whilst the development of good working relationships can happen naturally through the course of our work – after all, many of us do spend most of our time working – there are, however, things that you can do to create an environment that provides opportunity to develop professional and social connections, and to encourage them to flourish.

Employee surveys have reported that having a friend in the workplace is a key factor to employee engagement (find some evidence) and whilst it is not necessarily the responsibility of the employee to ‘create’ those social relationships, you can create the climate and opportunity that enables it to happen more easily.

Presented here are a number of ways to encourage those connections. Be careful that you are not trying to ‘force’ people into friendships. By creating the opportunity and the right environment it can happen naturally.

### **Best when**

This is an ongoing initiative. Creating the environment is not a one-off situation and should not be reserved for new starters to your team or business.

### **Best for**

Your focus may well be on creating opportunities for new starters or transferes into your team, but this should not be at the exclusion of others, nor should it be bespoke to that specific scenario. Ongoing activities will allow relationships to build throughout all levels and functions of your organizations.

### **Resources**

The resource requirements or investment you need to make will be dependent on the initiatives that you undertake. However, none of these need to

be at high cost and so funding should not be a barrier. The most significant investment is likely to be time – to establish, communicate and run activities, and for people to participate if you allow it in work time.

Volunteers to organize events or co-ordinate activities will be extremely beneficial. Identifying people who have an interest in doing so will get things off the ground quicker.

## Outcomes

These initiatives will ensure that the environment that people work in is a sociable one, and one that provides opportunity for new friendships. This in turn provides an internal support network for employees and it may provide opportunities for stress relief and downtime, as well as some fun in the workplace... in turn, this enables greater levels of engagement.

## Process

- 1** Induction buddying. Don't attach your new starters to just one person. Provide them with the opportunity to meet a variety of new people in their first few weeks – mix it up across different teams, functions and reporting lines to ensure a diverse range of people are introduced to each other. Include transferees, not just new starters, in the induction buddying process.
- 2** Establish a social committee made up of volunteers among the teams or the whole company. Encourage them to plan events, activities, outings, etc, but be clear about time and costs – will you allow any activities to take place during work time, or are all activities to be done in social time only? Is the company willing to subsidize any social committee-recommended activities, or all they all at the employees' own costs? Make sure new starters/transferees know how to get involved.
- 3** Get involved in theme days. There are various 'theme days' that crop up across the calendar such as Comic or Sports Relief, Christmas Jumper Day, International Women's Day, etc, and encouraging your team's involvement in them can feel like bringing a bit of fun into work. Consider how you would get involved, or create your own themes as the company takes on a new customer or a new region (eg if you bring on board a client from the United States, make that your theme for the day that the customer comes on board). Consider big events such as World Cup contests, the Eurovision Song Contest, etc – and how you could use those to support your social activity agenda.

- 4 Create a social space. In trendy start-up and creative agencies they may provide table-tennis tables, football tables, PlayStation, etc. You may choose to do this, but what you really need to deliver is a space for an informal drink and a chat.
- 5 Use social media. Set up group pages for employees and employee/company interests.

### **Hints and tips**

- Bear in mind any policies you may have about workplace relationships and potential conflicts of interest that might arise. Be transparent about the potential impacts of people's relationships with others at work – including issues such as the fine line between building relationships and potential harassment – but don't highlight these in such a way that it puts people off.
- Make sure you have a clear social media strategy in place. Employees need to understand what is and is not acceptable on social media and any consequences of not complying.
- Consider whether you need to set any expectations related to relationships at work. When planning your activities, think about different preferences people have. Not everyone will feel comfortable in large groups; for others, one-to-one interactions or finding their own connections may be further out of their comfort zone. Presenting a variety of options will be more likely to find an approach for everyone.
- Encourage the social committee to adopt the 'common cause' tool (Section 3) for some charitable or community initiatives.
- Relax a bit. Worrying about employees spending too much time away from their desks will hinder your find-a-friend strategies. Focus on supporting the positives of these initiatives, rather than on creating firm rules and policies for the few who may take advantage. Manage them as the exception, rather than the expectation.

### Your social media policy should include

- Clarity on what your organization considers to be acceptable personal social media use, if any.
- Clarity about how employees can utilize business social media – your company Twitter name, hashtags, Facebook pages and LinkedIn profiles. In the best examples, companies will encourage a clear delineation

between personal social media and company social media – suggesting that an employee may be free to post whatever they wish, provided their profile is not connected in any way to the company profile.

- Defining what would be considered as unacceptable and prohibited use of social media.
- Explanations of how you will monitor your employees' use of social media and personal e-mail.
- Descriptions of how you will deal with inappropriate use (which may include reference to the disciplinary policy).

## **Evaluation**

The evaluation of these initiatives will vary dependent on the activity that you decide to undertake, and the investment that the company makes in financial, time and resource commitment. As an overall guide, you want to know that people are enjoying their work environment, are making connections with others, and that those connections are enabling people to create friendships where they choose to do so.

You can ask simple 'pulse check' questions to find out if people consider work to be fun, if they have a friend at work and if they enjoy social activities at work. This will give a high-level indication of their satisfaction with your initiatives, but establishing the link to employee engagement itself is harder.

## **Peer post**

The results of many opinion surveys show that one of the simple things that employees say they crave is a simple 'Thank you'. Whilst as a leader you do have a role to play in recognizing the efforts and outcomes of others, it is not exclusively your job. You can do much to encourage everyone in your organization to do just that, and through 'peer post' you can provide both the opportunity and the tool. You provide simple postcards and empower all employees in your organization to informally send one with a personalized note to their colleagues, peers, bosses, etc, when they have been helpful, supportive, customer-focused, innovative – anything that promotes positive behaviours in your organization.

It is engaging because most people do not go to work solely to earn money. Most want to do a good day's work and be recognized and praised

for doing so. Peers are more likely to notice and appreciate the smaller added-value things that their colleagues do that support others – and the very nature of peer feedback and recognition means that it feels more genuine and ‘in the moment’ than feedback or thanks from a manager, which has a tendency to feel formal and appraisal-like. Additionally, research in the United States (Novak, 2016) found that 76 per cent of people keep handwritten notes, which makes the peer post approach more impactful and meaningful than sending an e-mail or a passing thanks in the corridor.

### **Best when**

Peer post is an effective way of building an informal and very low-cost recognition approach into the way your organization works. It presents opportunities to promote and recognize efforts to collaborate and work effectively across teams to deliver against goals, targets and day-to-day working demands.

### **Best for**

Peer post is intended to be an effective recognition tool for all employees. It is targeted at peer-to-peer collaborations, but this should not exclude using it for manager-to-employee – or vice-versa – recognition. Encouraging a broad use of this approach across your organization will only mean that more people are getting recognized for something that someone valued in their work, and that can only be a good thing.

### **Resources**

Whilst not expensive, investing a bit of money into simple but effective and professional-looking postcards will be worthwhile. This can be achieved relatively cheaply, but you will need to have a supply of cards across all your working locations so that employees have easy access to them as and when they want to send one. Reduce the cost and complexity by sticking to a couple of standard designs on each print run, but changing them frequently will be important (see ‘Hints and tips’, below). This is not a time-heavy initiative – preparing and printing the cards is a simple task, but communicating the approach may take some time to embed.

## Outcomes

The primary intended outcome of a peer post initiative is that employees feel that discretionary effort and collaboration are recognized by their peers. However, there are other beneficial outcomes. Organizations may experience an acceleration in discretionary effort – knowing that it is valued and appreciated by others may make employees do more of the same, or start doing it if they see others being recognized. Additionally, as colleagues begin to recognize each other's efforts, so teamwork and opportunities for collaboration increase. Silos may begin to break down, particularly if cross-functional recognition is promoted. Teams will begin to understand how they can positively impact on the work of others further down the process chain.

## Process

- 1 Communicate about the peer post initiative and its purpose and intent. Make sure people know the criteria for sending a card (ie if you feel someone has helped you, supported an activity, gone the extra mile for a customer) and encourage people to participate. Don't be too prescriptive though – allow people to thank others for what was important to them, not what *you* think matters.
- 2 Provide cards, make them visible with supporting promotional material (posters, etc) and keep them topped up so that they are always available for sending.
- 3 Encourage recipients to pin their received cards around their workspace – this is a visible indication that the process is effective, and highlights clearly who is receiving them. The more people see it being used for recognition, the more likely they are to send one.
- 4 As the manager – notice! Engage with team members who have received a card, talk to them about what they did and support the recognition effort. Provide your own feedback too.

## Hints and tips

- Don't judge who is getting what. With peer post, you are allowing people the freedom to send a card to anyone they wish to, based on something that they think was done well or was particularly helpful. You may get a few that don't meet your own criteria for that, but empowering others

to recognize colleagues means you have to allow them to do it their own way. You should only consider intervening if the recognition is sent for a behaviour or action that is counter to your values or goals.

- You may want to refresh the design or messaging every few months – it keeps interest in them alive and may encourage further recognition. If an employee has to send the same card twice it might not have the same impact for either the sender or the receiver. Updated designs will mean that your team members can collect from a range of postcards if they continue to perform in ways that their peers appreciate.
- Keep the language on the front of your postcards relevant to your audience. A young group might prefer a ‘cheers dude’ whilst an older employee base might get more connection with a traditional ‘thank you’.

## **Evaluation**

The primary – and perhaps most simple – measure for peer post relates to how many cards are being sent. Keep track of how many are available, at the start and end of a review period (monthly is probably most realistic), and assume that the delta is the number that have been sent.

By engaging with people who have received them, you will also get a sense of the recipients, and the actions they are taking to prompt the recognition. In specific cases, this may warrant further recognition, or you may want to highlight to the wider organization the kinds of behaviours or actions that are leading to peer post cards.

You may also get a sense of who the most frequent senders are – and consequently who is not sending them. You may not want to consider or address this on an individual level, but if you know that certain departments are not participating, you can look to address this.

## **Letter from the top**

As the leader of your business, or your team, how often do you put pen to paper to recognize the efforts of a team member or colleague? This tool recommends that you do just that – a reminder to use one of the simplest engagement tools available to you: to write a letter or note of thanks. It’s a great tool to use when you want to react immediately to an individual’s performance, and you want to recognize it with more than just a passing thank you.

### ***Best when***

An individual in your team, another team or a peer or colleague of yours has gone that extra mile, achieved something unusual or extraordinary, made it through a difficult period or experience, or delivered something that you were not expecting. They may have done something that you have noticed, or that others have noticed and mentioned to you (your customers for example). It is best captured ‘in the moment’ – as close to the time of the incident or experience happening as possible. Don’t procrastinate over it – if it caught your attention, then put pen to paper straight away.

### ***Best for***

This is a tool that is not only effective for employees at all levels across your business, but can also be beneficial for contractors and temporary workers, third-party suppliers, or other key stakeholders. Whilst you may not feel it is essential to secure the engagement of those not employed by you, consider whether in doing so you may increase your reputation as an employer, service provider or user of contract services, and think about the benefits that this might bring. For example, your actions may evoke greater commitment and therefore less turnover from temporary employees, which can only be advantageous to your business.

### ***Resources***

This is a very low-cost, low-effort approach to recognition and engagement. It uses only the time it takes you to write a note, and the cost of the paper you write it on.

### ***Outcomes***

It is intended that the letter from the top brings a smile to the face of the recipient. A very simple approach to recognizing the simplest of acts in day-to-day working life can add to the motivation and engagement of an employee – they know they are doing the right things, and that the things they are doing are noticed by you, by their colleagues or by the customer.

It is engaging because the employee feels recognized and valued.

## Process

- 1 Get a pen, get some paper or a card, and write a letter. Write it in pen, in longhand, yourself – it is much more personal than sending an e-mail, for example, and shows that you have taken some time on it.
- 2 Personalize the letter as much as possible – at the very least, demonstrate that you know the person you are writing to by using their first name, the one they are known as rather than the formal one that may be recorded on your system.
- 3 Be as specific as you can about the thing you are recognizing or thanking them for. A general ‘you did a good job’ will probably still land well, but if you can reference the specifics of what you have seen or experienced, the receiver will be clearer about what they did well, why you liked it and why they should keep on doing it.
- 4 Sign off the letter informally, but make sure the employee knows who it is from.
- 5 Give some thought to how to get the letter or card to the recipient. You might want to pass it via the direct line manager, or deliver it yourself. In some circumstances it may be appropriate to put it in the mail (internal or external), but there may be greater impact if it is delivered personally.

## Hints and tips

- Having some thank-you cards or notepaper in your drawer in readiness will be an advantage – but just your standard thank-you notes, nothing corporate or branded. This is about you personally sending out a thank you.
- You can use this kind of letter to support and advocate behaviours and actions that you want to see and develop in your business. Highlighting them in the letter will make it easy for people to connect the positive recognition with the specific behaviours or values that your organization advocates.
- Don’t overdo it so that these letters become commonplace. Make this a ‘special’ thing that people talk about, and that they are proud to receive because it is unusual. Don’t do it so rarely that your teams don’t know about it – but this should be done with an irregular heartbeat. It should not be in your monthly plans, or target-driven. If nothing has happened, no letters. If lots has happened – lots of letters!

- Make sure your direct reports know about this tool – not only should they be providing suggestions to you about letters you could be writing, but they might also want to do the same.

Of course there will be some cynicism (shaking the envelope waiting for the cash to fall out?) but it will still have an impact.

- Don't just write 'down' your organization – ie to those more junior to you. You should also encourage writing to peers, and maybe even to your bosses!

## **Evaluation**

In employee surveys, asking questions about recognition, being valued for contributions, etc, will give you an indication about how initiatives such as this may be working.

Listen out for the chatter – what are people saying about receiving a letter like this? Where are the letters going – do you see them pinned up in personal desk space, or going in the bin? React to what you see happening.

Is the act of recognizing a behaviour encouraging others to adopt it – are you beginning to see more of similar positive behaviours?

## **Benchmarking roadtrip**

Your employees could well be the best source of new ideas, innovations and process improvements for your business. However, when we focus on the same tasks, within the same environment, we rarely get – or take – the opportunity to see things differently. Sending an employee or two on a roadtrip could deliver some great benefits, as well as improved engagement.

The benchmarking roadtrip suggests that you send out an employee (or two) to test out, look at, and/or experience the ways that other businesses do things. It might be the competition, it might be a comparable industry or sector, or it could be vastly different. Briefing your benchmarkers will be important. They need to be clear about the objective of the experience, and what you expect from them on their return, as well as how it will work practically. In principle, they take a day away from the normal working environment, they take inspiration from others, and bring back some findings, ideas and recommendations.

## **Best when**

This tool is particularly beneficial when you are open to gaining some fresh ideas, insights or opportunities. It works well when you feel that the organization could take and respond to some inspiration from outside. However, be careful of the timing – if there are challenges in the business that are not related to your objective for the benchmarking roadtrip, it could be seen as inappropriate or may lack some credibility as an initiative.

## **Best for**

Employees at all levels across your business can and should participate in the benchmarking roadtrip – don't make this a hierarchical 'entitlement' for managers only. Where possible, encourage participants from an area of work or who undertake a task close to the one that you want to benchmark. The more relatable it is, the better it can be for the participant, and the more likely it is that they will bring back useful ideas.

## **Resources**

This is a very low-cost, low-effort approach to engaging teams in creative thinking and initiating change.

You will need to consider the expenses incurred on a trip – travel, lunch and anything that you may need them to buy to complete the experience.

The time out of the business for the employees is a factor to be considered. Typically this could be a half-day or a full-day experience, but allow enough time for it to be valuable. Don't stick too closely to your own geography just for the sake of time – you may lose an opportunity.

## **Outcomes**

The intention is that, through the employee's experience of benchmarking, the business identifies new ideas, fresh thinking and a bottom-up initiation of change. Seeing how things are done elsewhere should provide fresh perspectives on how tasks can be done, or on product or service offerings, and as a result your benchmarker should return with some inspirational ideas.

It is engaging because the participating employees feel valued and that they have had an opportunity to be heard, and to influence – but only if they come back with ideas. It is not a day off – and it is important to be clear what expectations you have.

## Process

- 1 Talk about the benchmarking trips as an opportunity through your usual communication channels. Take care to describe them well, explaining what you expect from benchmarkers and what they will be required to do.
- 2 Identify who/what/where to benchmark. A brainstorming session with your managers or board may help to generate some ideas – but consider all of the following questions:
  - Who: which companies make sense, who are your competitors, who are in similar industries?
  - What: which parts of your business or process do you want to focus on – a certain product, a specific process point, a policy or procedure?
  - Where: is it appropriate to look locally, regionally, nationally or internationally?
- 3 Identify the right employees to send out. You could consider opening this up to all employees to register interest and select some volunteers. Alternatively, ask your managers to provide some handpicked nominations.
- 4 Provide a brief. Explain clearly what you want benchmarkers to do before the trip, during it and what you are expecting from them on their return. You may need to support them in setting up meetings, or access to other companies.
- 5 Offer support on benchmarking day. A quick call or message of support on the day will encourage them, and remind them that they have your support.
- 6 Provide the opportunity to feedback to yourself and/or a wider group. Having been clear about your expectations before the trip, and explained the output that you want, this should not be a surprise. You should consider whether this is an informal or formal feedback process, in person or in writing.
- 7 The worst-case scenario is to do nothing as a result of the trip. If there are no actions to take, communicate across the organization what was discovered on the trip, and why you are not taking any action as a result. Ideally you will be able to share some key findings and a few small actions from the benchmarkers' roadtrip that will be taken as a result.

## **Hints and tips**

- Announcing this as a great new initiative will raise expectations that you may not be able to live up to, so keep it low-key and just focus on one trip or objective at a time.
- Don't constrain yourself to your industry – look at what you might be able to take out of some very different industries.
- Providing the opportunity to give feedback is important – but be wary of setting up a formal feedback presentation to a senior team as this may be a part of the process that employees feel most stressed about and it could impact the effectiveness of the process. You could instead ask them how they would like to give feedback – a report, a one-to-one with their manager, or a presentation – playing to their preference might get the best out of them in this scenario.

## **Evaluation**

- How many ideas are you getting? How relevant are they? How many have you implemented?
- What is the take-up rate of volunteers/invitees to take a roadtrip?
- What is the feedback coming back upstream? What are you hearing about the roadtrips?

## **Commitment cards**

The commitment card is an A4 piece of card, with a visual image or a short punchy statement on part of it that asks team members to record their commitment to your company goal, their team purpose or to their own individual action plan. The commitment card asks colleagues to write down their commitments, and to display them prominently for you, their teammates and possibly customers to see. The secret here is the visibility – gaining the commitment is important in the first place. You can work with each team member to ensure their commitments are aligned to the overall business or team direction. But by simply having them on display you create a talking point, an instant measurement and an ownership from the individual to the commitment they have made, but you also have visibility of the team's commitments or focus areas, and can encourage a clear line of sight between their commitments and the overall goal of the team or the organization.

## **Best when**

The commitment card works well when you have engaged the team in a workshop or meeting and are keen to encourage their commitment in the follow-up. It provides one way of you keeping up momentum, and keeping conversations alive.

## **Best for**

The commitment card is appropriate for all levels and all employees in the organization. It should not be hierarchical – if you are asking your team to put down their commitments, then senior managers should put down theirs too.

## **Resources**

There is minimal time and cost requirement to deliver the commitment card. Cards can be ‘home-made’ at minimal cost – just printing and card. Whilst you may want to add professional touches (team photographs, professional printing, etc) these are not material to the success or otherwise of the card initiative, but may improve the overall aesthetics. Remember though that the commitments are time bound – so this is not a long-term investment – the commitment card may be updated or renewed and replaced regularly.

The time commitment too is minimal – you will most likely be discussing the commitment during your meeting or event, so the added task is only to confirm, write and post the commitment card.

## **Outcomes**

Leary-Joice (2004) suggests that when people take responsibility they take ownership for success and will feel empowered to deliver their part of that overall success. Completing the commitment card can encourage people to take that ownership.

## **Process**

- 1 Prepare the commitment card template prior to your meeting or event. Keep it simple by just designing or printing your own card – or if you feel the investment is worth it, involve a design and printing team to get it done professionally. The card should show the vision, an inspirational quote or an engaging image (depending on what is important to

you at the time) on one half of the card, with space on the other half for the individual's commitments.

- 2 At the end of a strategy, team build or objective-setting workshop or meeting, ask team members to write down their commitment(s) – eg how they can support/deliver/contribute – what they commit to do.
- 3 At the end of the event, collect in all the commitment cards. This safeguards against them getting lost, left in cars or forgotten about. Take some time to review them to familiarize yourself with the commitments your team have made. If you can, before the team arrives the next day, get them pinned up visibly in their office space. They might take up a team noticeboard, or you may be able to get them pinned up in the workspace or desk for each individual. Keep them visible – the cards should stimulate discussion and collaboration, so having them where colleagues can see them and comment on them is an important part of the process.
- 4 Transfer the commitments to the individual's objectives or performance review – this makes sure that the process is seamless, and the commitment is not seen as an 'extra' but as part of their day job.
- 5 Make sure you follow up – in walkabouts, managers should take the opportunity to chat about the commitments with employees – how is it going, are they still valid, do they still see the link with the vision? (But be gentle, it is not a test, it's a chat!)
- 6 Keep them alive, don't allow them to go unnoticed and fall out of date. Encourage people to note updates on them, tick when something is achieved. Treating the commitment card as a live document will add to its value.
- 7 Renew and refresh the commitment cards at your next event or meeting.

## **Hints and tips**

- Use a photograph of the employee: make them more fun by adding a picture of the person as well as their name – you can add a new and informal talking point that can help to break down barriers if you ask them to attach their baby photo, a caricature, a 'selfie' or a picture of the superhero they would like to be! These small talking points encourage people to interact informally about the commitment card... and that could lead to discussions about the commitment, about how they could help each other, work collaboratively, achieve more together. If you can do it, why not get an informal picture of the whole team to put on there?

- Use an inspirational quote: the internet is a great source for inspirational business quotes. If you want to use one of these on your commitment cards, make it relevant and connected to the goal or the commitment you are looking for. Here are some topic-based examples of quotes you might want to consider:
  - For customer focus: ‘Get closer than ever to your customers. So close, in fact, that you tell them what they need well before they realize it themselves.’ – Steve Jobs
  - For innovation: ‘If you can dream it, you can do it.’ – Walt Disney
  - For teamwork: ‘Coming together is a beginning; keeping together is progress; working together is success.’ Henry Ford
  - For personal development: ‘Continuous effort – not strength or intelligence – is the key to unlocking our potential.’ Winston Churchill.

There are plenty more like this to be found online, so find one that is right for your organization, your culture and your current goals.

- Using imagery can also be quite powerful – if you can use pictures from your business that are relevant to the goal, all the better. Pictures of your products, of services in action, of sites, locations or core activities, and including your logo, will all make the card more relevant and meaningful for team members.

An example:

**Figure 1.2** Sample commitment card



## **Evaluation**

The initial evaluation for commitment cards is simply a question of whether each employee has made a commitment, has posted it visibly in the workspace and has been able to deliver against that commitment.

Harder to assess is the degree to which the team is talking about and collaborating on their commitments. You might also consider how much more aware managers are of the commitments of their team.

More indirectly, you may be able to assess whether the delivery against commitments has had any bearing on service levels, productivity, efficiency, sales or profit.

## **Clear objectives**

Whilst effective objective setting is a part of any standard line manager's training, its importance for employee engagement is often overlooked. Concerns about a company's appraisal processes, or the effective cascade of objectives, often present opportunities for managers not to set objectives, and concerns about where they come from and how to structure them effectively are often a basis for poor objective setting.

Engagement surveys show that employees want to know what they have to do, they want that to be motivating (although what motivates each one may be different) and they want to know how what they do each day contributes to the overall goal of the organization. With those key engagement factors in mind, the setting of quality objectives becomes extremely important.

This means that you are likely to get the best performance from your employees when they understand the objective, can see its relevance, are motivated by it and have a reasonable chance of achieving it.

## **Best when**

Setting clear objectives is best as an engagement tool at any time that you want to allocate tasks, responsibilities or development opportunities to an employee. There may be an annual performance cycle, and whether your organization's performance review processes are formalized and structured, or informal, you should have some process of determining each employee's contribution to the business goals through individual task or objective setting. Establish whether this is a regular cycle, or whether those objectives

are set and reviewed according to the individual's role. Working to the established timeline will allow the opportunity for some structure in the process, and ensure that performance against those objectives is reviewed in a timely manner. However, setting clear objectives is an ongoing task and critical to retaining the engagement of your team members.

### **Best for**

- *All employees:* every employee in the organization, regardless of seniority or function, should have clear objectives against which their performance and contribution can be measured.
- *New starters into your team:* whether they are from outside the organization or internal transfers, new people joining your team should be allocated objectives for their new role. This helps to mark the closure of one set of tasks for internal transferees, and helps the joiner to quickly understand what it is they have to do, and how they will be assessed. It provides new joiners with the opportunity to quickly engage with the team and start to see the impact of their work on the overall team performance.
- *Underperformers:* for those employees in the organization who are not performing, a clear and focused set of objectives that are regularly monitored and reviewed will allow the opportunity for a line manager to manage the performance to an acceptable level (and hopefully above) or to demonstrate a lack of capability to perform in the role (and manage the consequences, having done so).
- *High performers and employees who want to develop:* some employees may be considered to be performing extremely well in their role, and whilst there should be other interventions to ensure that their talent is optimized and retained, the setting of stretching and challenging objectives should not be underestimated in its ability to engage the high performer. In such cases, the more stretching the better, and objectives should provide an opportunity to work cross-functionally, in challenging projects and with different stakeholders or team members. This allows the high performer to raise their visibility and prepares them for potential cross-team transfers or promotion.
- *Leavers and retirees:* it may seem pointless to set objectives for those who are already planning to leave the organization, whether by retirement or resignation. However, it can be extremely useful to consider setting

objectives that allow the exiting employee to consider what they want to achieve prior to their own exit (what would they want their legacy to be) and/or to set specific objectives that focus on the closure of activities or projects and the handover of specific tasks.

- *Career breakers*: setting objectives can be a useful tool for maintaining the engagement of those taking a career break, for whatever reason. In some circumstances (not all) it may be beneficial for a manager and employee to work together to establish some objectives for the career break itself (eg keeping in touch, benchmarking other companies whilst travelling, or learning new skills), or objectives that might be implemented on their return to work.

## Resources

No specific resources are required, but as preparation material you may want to gather and review some of following documents:

- your company or divisional strategy;
- team goals and targets;
- the employee's job description.

## Outcomes

A clear set of objectives can be motivational and engaging for your team members. Ensuring that employees understand what they are being asked to do, and why it is important, encourages that engagement and commitment.

Objectives that set clear expectations allow you to effectively monitor and manage performance. Do not assume this is all negative. Clear objectives mean that you can see where there are shortfalls in performance or delivery. They can also help you to recognize (and therefore reward) when performance is on track or beyond your expectations.

Regular monitoring provides you with the opportunity to address either of the above issues. Where an employee falls short, more focused discussions are needed about progress, actions and where they can improve – this kind of help should encourage them back on track. Where an employee is exceeding your expectations, regular review provides the opportunity to ensure that speed of delivery is not at the cost of the 'how' of performance.

## Process

- 1 Establish the reason for setting the objective. Knowing and understanding this context will help you to frame the conversation with your employee most effectively. Take some time to consider whether the employee is underperforming or overperforming, motivated or demotivated, planning to leave the company, etc.
- 2 Schedule a meeting to discuss and agree the objectives. Draft out some focus areas where the employee could contribute – ie in projects, initiatives, delivery of tasks, etc. Ask the employee to do the same as pre-work for a meeting. At this stage, they should not be fully formed objectives, but may become so later in the process.
- 3 During the scheduled meeting, share your ideas, and collaborate to identify an appropriate set of challenging objectives.

## Hints and tips

- Meet face to face to discuss each employee's objectives – this task is not engaging or motivating if it is all done by e-mailing back and forth.
- The 'making connections' tool (Section 14) can be an extremely beneficial precursor to the individual objective-setting process. It provides clear line of sight between the overall company goals and the individual, creating the connection between what the employee does and how the company succeeds (or otherwise).
- The copy/paste approach to objective setting is not an effective way to ensure that the team collectively achieves a group of goals. If your own objective is to 'save 10 per cent' then copying that into four sets of employee objectives will not work. You need to ensure that you are able to allocate proportionally and/or give specific and job-relevant tasks; also consider how motivational it would be if your objectives were just a copy/paste from your line manager. You may take the view that they are simply giving you their job to do.
- Does your objective pass the 'stranger' test? If you handed that objective to me would I be able to understand what was expected, and would it seem interesting, exciting and challenging? To pass the stranger test the objective needs to be clear on task and expectations, free of jargon or acronyms, explicit on measurement and with a transparent timeline.

Often we assume that people know what is meant by what we write, but giving a few minutes to consider the stranger test will allow you to challenge your own assumptions and provide a great-quality objective.

## ***Evaluation***

The evaluation of effective objectives happens at three main levels:

- 1** The first is to look at the objective and determine whether it meets the basic requirements – that is, is it a SMART\* objective, clearly documented, stretching and aligned to the organization's goals? Is it written simply and with clarity – that is, does it pass the 'stranger' test? A simple test of these points is to ask the employee to clarify their understanding of what they are being asked to do.
- 2** Second, is it engaging and motivational? To achieve its purpose in relation to delivery of task, the objective needs to meet the above criteria. But more than that, if it is to be engaging and motivational, there needs to be stretch and opportunity to do something new, different, challenging, etc. The employee will be the main judge of that, but bear in mind that you may not find the same things exciting or challenging.
- 3** Third, has it been achieved? The primary measure of whether an objective was effective is whether it was achieved, and how it was achieved.

\*SMART = Specific, Measurable, Achievable, Realistic and Time-bound.

