



White paper

One organization's roadmap
to improving employee engagement
and business performance

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Leaders recognize that in today's environment, strong employee engagement is a necessity. Organizations cannot compete for talent or market share without an engaged workforce. For many leaders, however, it's not clear what to actually do about engagement. This is a story about how one organization took steps to improve engagement. (Spoiler alert – with data, analysis and expert guidance from The Truist Leadership Institute, the investment paid off.)

The context

This organization is mainly a phone-based Customer Care Team (we'll refer to them here as "CCT"). The team has around 900 employees, is part of a Fortune-250 corporation and had up to eight locations in the Eastern U.S. The Truist Leadership Institute conducted an engagement study in November of 2017. Although CCT's engagement level was high by call center industry standards, it stood out as one of the lower-scoring areas of the corporation. CCT had just announced the upcoming closure of a location.

CCT embarked on several programs in 2018, including focusing on improving customer feedback and revamping some processes. Improving employee engagement was one of those programs.

The action plan

CCT's leadership (a team of about eight) decided to invest in higher employee engagement. They decided higher engagement was not optional, and not just a "nice-to-have" if other priorities got done – it was an objective on equal footing with other business objectives.

To begin, leadership examined the results of their engagement study. The results indicated where each location's engagement levels stood. The results also revealed which workplace conditions seemed to be having the biggest impact on engagement levels – the "top drivers" of engagement, specifically for CCT. This is important, because the set of top drivers are unique to every organization – they can even differ between teams in the same organization. For CCT's leaders to plan actions that would have meaningful impact, they needed to know how to invest their resources.

"The Truist Leadership Institute engagement study results were very important. They were very influential in helping us determine areas of focus for 2018, and they were essential to guiding us on our initiatives."

– Head CCT Executive



The Truist Leadership Institute helped CCT leadership get the most value from the study results. With expert analysis from The Leadership Institute consultant, CCT determined their top priorities for engagement actions. They also ensured their plans aligned with their 2018 strategic objectives (e.g., Could the engagement actions be blended with other corporate initiatives? Could efforts on other projects be leveraged for engagement actions?).

CCT developed 10 teams to address top engagement drivers. The teams focused on employees' relationships with managers and employees' feelings of autonomy, support and value. They also focused on basic job tools that enabled employees to succeed in their work. The Leadership Institute consultant brought research to the equation by describing how empirical evidence could inform how actions were implemented. Such insights from the literature helped avoid wasted efforts or unintended consequences.

“The Leadership Institute’s consultant was very much a guiding force in helping us form and shape our assessment of the study results and how to translate those into actionable initiatives.”

– Head CCT Executive

Implementing the plan

To monitor their progress, CCT implemented a very short weekly survey, which opened a continuous dialogue with employees. The leadership team acted on what they heard, and communicated their actions to the workforce. This assured employees their voices were being heard and valued.

The leadership team met monthly to review employee feedback and track progress on the teams. CCT assigned team leaders, who were held accountable for each team's progress. CCT discussed the results of each week's survey – the scores on ratings questions, as well as the content of open-ended feedback. CCT discussed how to act on employees' thoughts and carried out changes (for example, leadership implemented standard daily team meetings to enhance employees' clarity about organizational decisions and their connectedness with each other and their managers).

CCT leadership also implemented and publicized monthly videos from the top executive that featured organizational, team and employee accomplishments; discussed the rationale and implications of organizational decisions or changes; and shared news.

In short, CCT made a substantial investment in employee engagement. At every step of the way, they leveraged The Truist Leadership Institute's research, analysis and experience to maximize that investment.

After two months of planning and 10 months of implementing, it was time for CCT's 2018 annual engagement study. The results indicated their engagement investment paid off (see Figure 1). Other business metrics also improved during 2018 (see Figure 2). Of course, the improvement in business metrics cannot be directly attributed to the lift in engagement; however, the pattern matches substantial research that shows connections between leadership actions, higher employee engagement and stronger business performance (Christian et al., 2011; Harter et al., 2002; Humphrey et al., 2007; Nahrang et al., 2010). Taken together, these findings support the idea that CCT's rising employee engagement helped drive better business outcomes.

Figure 1: Selected results of investing in engagement

Year-over year improvements in engagement survey scores*	Nov. 2017	Nov. 2018
Job satisfaction score	72	80
Annual survey participation	54%	83%
Energy score**	61	71
Manager connectedness score	69	83
Meaningful work score	62	75

* Margin of error ranged from approximately 3 to 5 (95% confidence).

**2017 And 2018 survey items were slightly different for these constructs.

Figure 2: Selected business metric improvements

Year-over-year improvements in business metrics during relevant time period (Nov. 2017 to Nov. 2018):

Metric	YOY change
Percentage of calls answered in less than four minutes	39% lift
Percentage of employee interactions rated as “excellent customer service (third party-administered customer surveys)	7% lift
Turnover (monthly)	14% reduction



Key takeaways:

- Be an example at the top – be passionate
- Conduct a study with a validated survey instrument and expert analysis
- Commit to act: make it a strategic priority and free up leader and manager time for actions
- Plan actions based on your organization’s survey results, strategic objectives and team climate
- Execute actions based on the best scientific evidence and guidance from seasoned practitioners
- Listen to employees along the way and communicate the actions you take

References

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Truist Leadership Institute

During the past half-century, Truist Leadership Institute, and its predecessor firm Farr Associates, have developed and refined approaches to business leadership through collaborative work with clients throughout the United States. The Truist Leadership Institute provides organizations with a leadership development partner who helps create dynamic and effective leaders, increase employee retention and improve the bottom line.