



**XM INSTITUTE EBOOK**

# **15 Tips for Engaging Employees**

**BEST PRACTICES FOR MAXIMIZING VALUE FROM ONE OF YOUR ORGANIZATION'S MOST VALUABLE ASSETS**

By **Aimee Lucas**, CCXP  
XM Catalyst

**Bruce Temkin**, CCXP  
Head of the Qualtrics XM Institute

**Isabelle Zdatny**, CCXP  
XM Catalyst

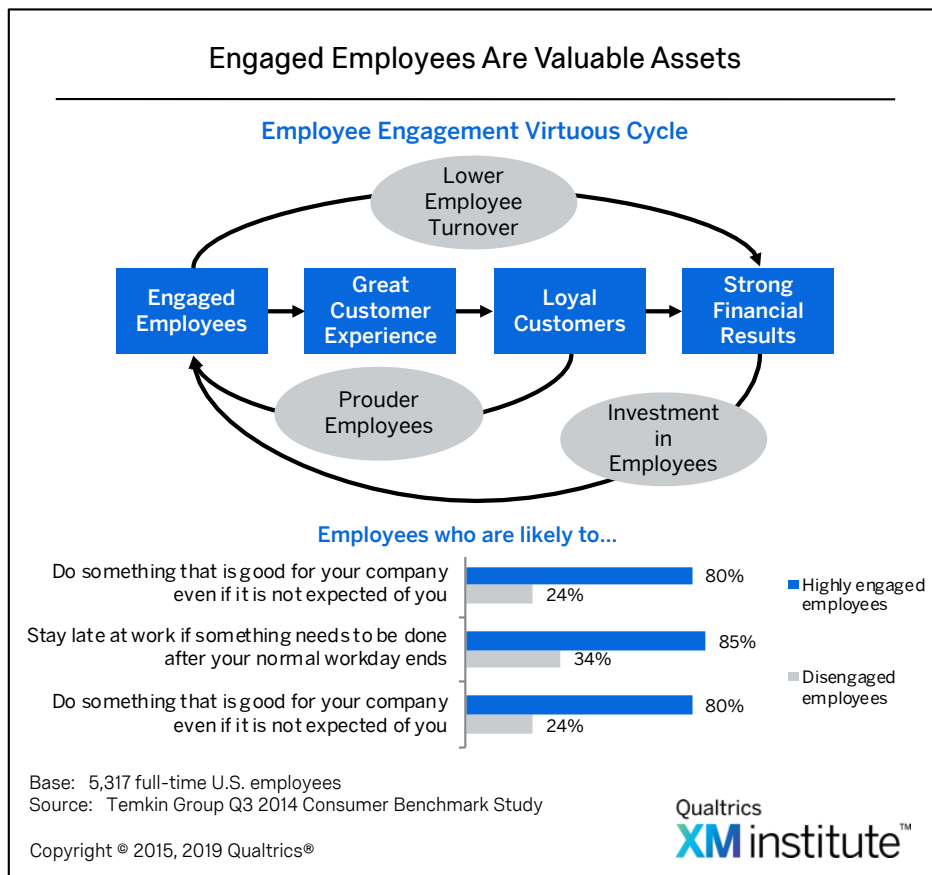
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## EXECUTIVE SUMMARY

It is impossible for an organization to deliver a great customer experience without an engaged workforce. To help you engage your employees in your customer experience journey, we have compiled a list of 15 examples of how leading-edge companies are practicing what Temkin Group calls the “Five I’s of Employee Engagement” – Inform, Inspire, Instruct, Involve, and Incent – which you can modify and emulate at your own firm.

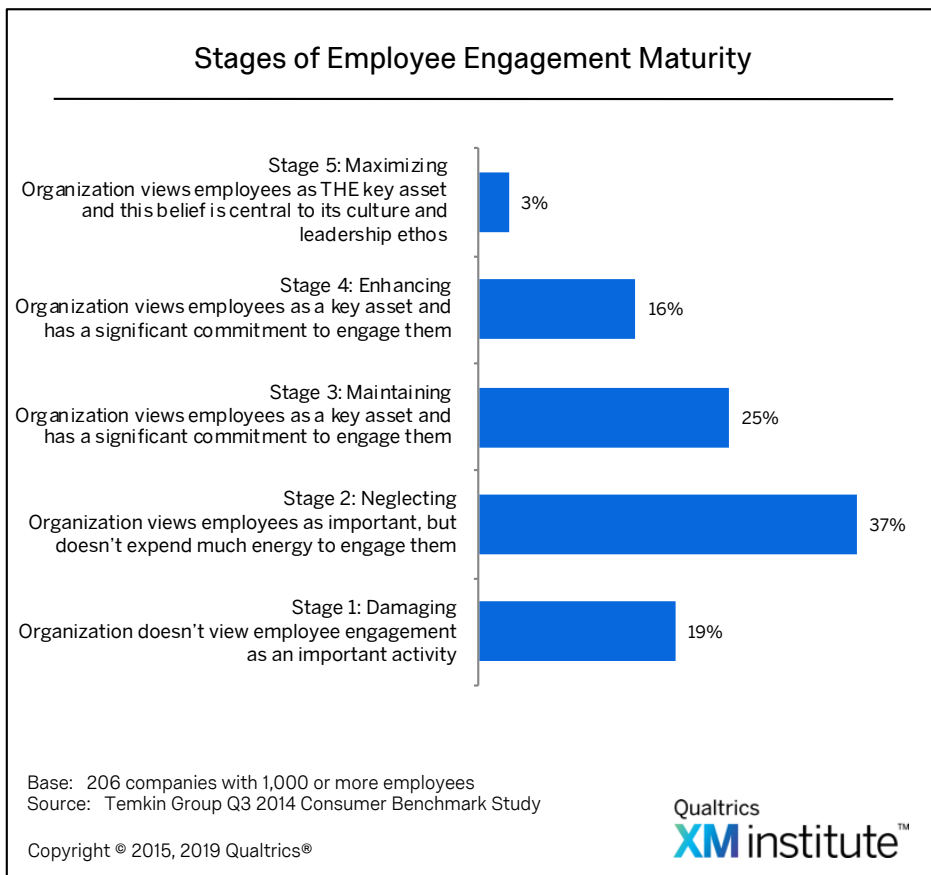
## ENGAGED EMPLOYEES ARE UNDERVALUED ASSETS

Engaged employees are invaluable assets that should not be overlooked. Our research found that engaged employees improve business results as they try harder at work and are more committed to helping their companies succeed.<sup>1</sup> These employees help companies succeed by triggering a “virtuous cycle” that drives both good customer experience and strong business results.



<sup>1</sup> See Temkin Group Insight Report “Employee Engagement Benchmark Study, 2015” (February 2015)

To understand how companies are working to improve employee engagement, we surveyed executives from more than 200 large organizations and asked them to complete Temkin Group's *Employee Engagement Competency & Maturity (EECM) Assessment*. The results show that less than one out of five large organizations has reached the top two (out of five) levels of employee engagement maturity.



## 15 TIPS FOR RAISING EMPLOYEE ENGAGEMENT

To reap the benefits that an engaged workforce brings to customer experience efforts, companies need to fuel the front-end of the employee engagement virtuous cycle. There are five categories of practices that can help companies do just that, and we call these the “Five I’s of Employee Engagement:”

- **Inform:** Provide employees the information they need to understand the organization’s vision and brand values along with how customers feel about the organization.
- **Inspire:** Connect employees to the organization’s vision and values so that they believe those matter and take pride in their job and the organization.

- **Instruct:** Support employees with the training, coaching, and feedback they need to successfully deliver the organization’s brand promises to customers.
- **Involve:** Take action *with* employees when designing their jobs, improving work processes, and solving problems identified through customer or employee feedback.
- **Incent:** Deploy appropriate systems to measure, reward, and reinforce desired employee behaviors and motivate employees to give their best.

## Employee Engagement Best Practices

To help you engage employees in your company’s customer experience journey, Temkin Group has curated a list of 15 examples of how companies are practicing the Five I’s.

### 15 Employee Engagement Tips

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**Inform**

- Follow a Thorough Communication Plan
- Create Opportunities for Employees to Hear from Customers
- Add Interaction to Internal Communications

**Inspire**

- Increase Accessibility to Senior Executives
- Help Employees Understand What the Vision Means to Them
- Energize Employees with Success Stories

**Instruct**


- Launch Company-Wide CX Training Programs
- Tie Training Back to On-The-Job Behaviors
- Expose Millennials to New Skills Through Stretch Assignments

**Inform**

- Establish a CX Ambassador Program
- Develop Employee-Driven Improvement Processes
- Match Personal Interests to Company Needs

**Incent**

- Provide On-the-Spot Rewards
- Use Customer Recognition to Reinforce the Importance of Every Role
- Manage Performance with Clear Goals and Frequent Feedback



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### Tip #1: Follow a Thorough Communication Plan

(Inform)

Employees are exposed to many messages at work every day. Therefore, to make sure employees absorb their customer-centric messages, CX professionals should be executing well-defined communication strategies that include consistent themes and distinctive branding. BMO Financial provided all employees with a brand book detailing its new brand positioning. This book included a breakdown of what will be

different “tomorrow from today” and the “Our Way” model, which defined the employee behaviors necessary to work together to deliver on the bank’s new target customer experience. Leaders across the bank were tapped to lead the roll-out of the new brand. Each of them received a launch kit containing a DVD and materials to help them cover key messages and talking points along with anticipated Q&As to prepare them to lead discussions with their teams.

## **Tip #2: Create Opportunities for Employees to Hear from Customers**

Inform

While sharing internal information with employees is important, exposing employees to customer feedback can have an even more powerful effect. SimplexGrinnell holds annual district NICE Workshops (Next Improvement in Customer Experience) to drive continuous improvement across the company. The workshop is a very focused five-hour interactive session to develop an action plan for improving the customer experience. During the workshop, small teams of managers, administrative staff, and front-line employees review CX metrics and code 80-100 customer verbatim comments drawn from surveys completed over the past 12 months. Using the customer feedback, the teams identify and agree upon the top customer issues and then brainstorm new and existing best practices to implement that will make an impact on customer satisfaction within 90 days. These potential issues are refined over the 30 days following the workshop, and the company ultimately settles on 3 to 5 improvements that it can immediately implement to change customers’ perceptions of service delivery.

## **Tip #3: Add Interaction to Internal Communications**

Inform

Through social tools, companies can monitor and react to employees’ responses to the messages it shares. USAA’s online water cooler – known as Courtyard – allows employees to post comments on enterprise news stories and drive their own discussions. In one example of this two-way communication in action, when USAA announced changes to a member service tool, a high volume of employees immediately commented on how the expected improvements from these changes did not actually reflect feedback from members regarding their expectations for the tool. The volume of feedback caused USAA to re-examine and adjust the changes before the company rolled them out to members.

## **Tip #4: Increase Accessibility to Senior Executives**

Inspire

Senior executives should be an important source of inspiration for employees. As a way to continuously reinforce its commitment to customer experience to its employees, Sprint takes their senior leaders out of the office and into their call centers and retail locations for a *Day in the Life of the Frontline* experience. During the visit, the executives engage in a variety of activities, including job shadowing and facilitating a focus group with employees. For executives, this activity gives them a view into

what's working and what's not working in the real world. And for employees, seeing the leaders' act in new ways reinforces their belief in Sprint's commitment to improving CX.

### **Tip #5: Help Employees Understand What the Vision Means to Them**

Inspire

The most successful organizations clearly define what they stand for and use these core values to guide their decision-making and actions in ways that are tangible to employees. When Fiserv embarked on its customer experience transformation journey, the CX organization began by defining a vision and mission to give direction to its efforts and to reinforce the purpose of the work that all associates do. It settled on a vision, "To delight our customers with every interaction," which linked to a mission recognizing the importance of making the right environment, education, and tools available to associates. Fiserv translated the vision into interaction target guides for associates, which defined specific behaviors that reflect the vision along with Fiserv's values and excellence principles. Fiserv works to keep this clarity of purpose strong by employing "elevator speeches" that connect Fiserv's vision and goals to what individuals specifically do on the job and how their work ties to strategic outcomes for the organization. Fiserv also embeds these values into new hire onboarding processes, associate training, and performance management systems.

### **Tip #6: Energize Employees with Success Stories**

Inspire

Stories not only motivate employees, they also stick in their memories better, reinforcing an organization's values. John Deere Financial's Own the Moment intranet site combines online resources with an online forum for employees to submit their stories about serving customers and living the company's values. These stories are fed into VIP (Values in Practice) Huddles – weekly 20-minute team meetings that reinforce cultural elements such as common purpose, values, and behaviors and share other internal communications. The company uses a senior copywriter to build out stories sourced from these online postings, and these stories are then distributed to department leaders to use in the VIP Huddles. The writer, along with an editorial committee, provides department leaders with guidance on how to tie the story to the focus of the weekly meeting, and they also suggest some questions leaders can ask during group discussion. Because employees don't always recognize that they have a powerful story to tell, internal Experience Champions listen for stories and either encourage their coworkers to share online or offer to submit their stories for them. John Deere Financial also uses these stories to highlight leadership behaviors and to recognize that, although not every manager and employee carries out their responsibilities in exactly the same way, everyone can still "own the moment" and make an impact.

### **Tip #7: Launch Company-Wide CX Training Programs**

Instruct

Just about any change to customer experience requires employees to change both what they do and how they do it, which requires company-wide CX training. To ensure all Hilton Garden Inn team members engage with guests in ways that live up to the hotel's Guest Satisfaction Promise, the brand developed a multi-faceted training program that includes videos, a board game, and role-playing. The company provided hotel general managers with materials, and these managers participated in webinars that prepared them to deliver the training back at their hotels. One unique element of this training was the use of actual team members to act out different service interactions. The company held a casting call for past winners of its Spirit of the Garden award. These past winners sent in video submissions and participated in interviews, and then the company selected a few of them as "actors" to depict the five most common scenarios in which a guest promise might be broken. These actors also shared their own problem resolution experiences.

### **Tip #8: Tie Training Back to On-the-Job Behaviors**

Instruct

The impact of training programs can falter when employees return to their regular jobs. Companies can mitigate this by combining best practice sharing and action planning into their training designs. During its first year of CX transformation, over 500 of Ciena's employees participated in training courses targeted at customer-facing employees in sales, services, support, and product. During these workshops, employees learned about Ciena's CX vision, got an update on the company's progress on key initiatives, and heard the latest round of customer insights. To ensure that employees left training with a solid understanding of Ciena's CX vision and the know-how to individually deliver on that vision, the workshop also included action planning and best practice sharing. During these sessions, employees shared the work they were currently doing that aligned with the vision, and they also committed to additional actions they would take back on the job.

### **Tip #9: Expose Millennials to New Skills Through Stretch Assignments**

Instruct

Millennials bring a thirst for knowledge and a desire for personal development and progress to the workplace. Organizations can meet these needs by proactively working with Millennials to expose them to special assignments that grow their skills and position them for advancement. At Halogen Software, new graduate hires have the opportunity to spend up to 20% of their time on work outside of their primary job and are encouraged to join projects outside of their usual responsibilities to build their business knowledge. The company also offers these employees the opportunity to apply their growing knowledge by participating in a mini-business simulation, where they create a fictional company, progress through all of the processes of that company, and then give feedback to the simulated business on the experience as if they were customers.

**Tip #10: Establish a CX Ambassador Program**

Involve

CX teams can't do it alone, so an ambassador (or champion) program can help engage employees from across the organization. Fidelity's *Voice of the Customer Ambassadors* are the cornerstone of the company's efforts to engage customer-facing associates across the organization. Through this program, dozens of frontline associates are selected from across Fidelity's phone sites and branches to create meaningful connections between the field and headquarters in support of customer experience. For one year, these Ambassadors devote approximately five percent of their time to a three-part role:

1. *Identifying* opportunities for improvement by amplifying the voice of the customer/associate. Ambassadors leverage Fidelity's online collaboration platform to communicate directly with product managers regarding ideas for improvement. The Ambassadors have been instrumental in driving hundreds of product and service improvements that deliver a better customer experience.
2. *Informing* product and service development by working with product managers. Ambassadors partner with product managers early in development cycles to ensure that product designs are customer-centric. Ambassadors help guide product design, functionality, and even terminology decisions to support of the delivery of thoughtfully designed experiences.
3. *Inspiring* their peers with local evangelism and dialogue around customer experience efforts. Ambassadors have played a key role in shaping new training curriculum, new recognition programs, and local communication routines. They serve as local evangelists in their respective phone sites and branches, fostering ongoing awareness and engagement with CX efforts.

**Tip #11: Develop Employee-Driven Improvement Processes**

Involve

Through their day-to-day experiences, employees can identify valuable ideas to spark innovation. Genworth Financial's Ideation process has been an important tool because it helps every employee become a customer advocate. The tool enables them to submit issues or ideas that are then translated into actions that better serve the customers' needs. Cross-functional business leaders meet to review new ideas and advance any high-potential concepts through the four stages of the company's new Product Innovation process: concept, business case, advance to launch, and post-launch. Customer insights are integrated throughout this process to provide validation and enhance the ideas being pursued.

**Tip #12: Match Personal Interests to Company Needs**

Involve



It's easy for companies to overlook employees' personal interests, even though they can actually add value to the firm's work. Harris + Hoole introduced social tools in part to help employees feel like they can speak up and participate in making decisions. One example of this has emerged in the area of selecting music in its coffee shops. Not every shop manager shares the same level of knowledge of or interest in music, so the company created a dedicated chat room on its social network where shop managers and baristas with a passion for music can share their playlists with others who don't know where to start and need an easy way to select music for their stores.

### **Tip #13: Provide On-the-Spot Rewards**

Incent

One of Temkin Group's 6 Laws of Customer Experience is that employees do what is measured, incented, and celebrated, so it's important that managers have a way to recognize employee behaviors that support the change. Hershey Entertainment's Legacy Check program gives every manager and supervisor a "checkbook" they can use to write a Legacy Check and give on-the-spot recognition when they catch an employee doing something exceptional in line with Hershey's values. Copies of the check go to the employee, their supervisor, and the gift card program. As an employee receives Legacy Checks during the course of a year, the value increases in \$5 increments each time. Employees can save up their gift cards and use them across Hershey Entertainment options (including concerts, restaurants, spa, theme park, etc.). Recipient profiles are published on Hershey's intranet—including their name, picture, what they did, and who presented the award.

### **Tip #14: Use Customer Recognition to Reinforce the Importance of Every Role**

Incent

Companies need to create an environment that reinforces the behaviors that they want to see. Public accounting and consulting firm Crowe Horwath uses client and peer recognition programs to reinforce the importance of every role. Crowe's client engagement survey gives clients the opportunity to recognize—by name—any employee who went above and beyond during the course of their work together. Clients who return surveys recognize employees for everything from consistency in doing the little things right to super-hero actions that saved the day. These Recognize Alerts are generated by its survey platform and used to individually recognize and reward employees for their efforts. Crowe's system allows any person recognized through the survey to forward the recognize alert to others and include his or her comments and recognition as a way to Pay It Forward to employees whose behind-the-scenes efforts contributed to the positive experience the client had. Crowe honors the employees with the highest number of recognize alerts in each business unit with an Exceptional Client Experience (ECx) award.

### **Tip #15: Manage Performance with Clear Goals and Frequent Feedback**

Incent

Traditional performance management processes are built on backward-looking evaluations and coaching that's provided once or twice per year. Millennials want more. This includes clear definitions of what success looks like up front, explicit expectations, goals that have meaning to them, and frequent informal feedback that supplements regular performance discussions. Technology firm Adobe abandoned its performance review process and replaced it with a new program called the Check-In, which places an emphasis on having the employees themselves driving the right kind of performance discussions. The Check-In is composed of three elements: a joint expectation-setting step at the start of the year, frequent informal feedback in addition to quarterly expectations discussions, and employee-owned learning and development plans. The company rolled out this new process with a series of information sessions and training for all employees and managers. The HR department provides ongoing support and guidance on how to set expectations, write development plans, and give or receive feedback.