Client Accounting Practice –

Employee Engagement Initiative

Phase I Report

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**PROJECT SUMMARY**

**Introduction**

The mission of the Employee Engagement and Coaching Project is to serve the Client Accounting Practice, and the people it employs, in achieving their full potential and in the process, increasing employee engagement.

This report details the project’s structure, methods, accomplishments and metrics of Phase I (launched in February 2011).

The Project’s goal was to increase employee engagement and manager effectiveness in CAP with three initiatives:

* Employee Engagement – creating engagement and leadership from the bottom up
* Management Talent Coaching – maximizing the effectiveness of top-down leadership.
* Meeting in the Middle – greater innovation through participatory leadership and encouraging communication across hierarchical lines.

The Bank and Department have invested in the creation of a diverse workforce and Bank-wide employee engagement and training programs. The next step is to specifically address the employee’s personal decision to engage.

Employees choose to engage, thus maximizing all previous investments in Bank-wide programs, when:

* “engagement” is directly linked to the quality of their lives
* managers are coached and trained to engage their Teams, and
* innovative methods are employed at the Team level

**Metrics**

The pilot projects in Phase I were successful based on the following metrics:

* Significant (approx 25%) increase in engagement in 6 months based on survey results
* lowest levels of late/revised accounts in period of highest engagement activity
* 100% increase in discretionary effort based on Team’s creation and implementation of Department-wide projects
* 50% of Insurance Team members took additional career development steps
* Minimal resources required to achieve these results

**Findings**

The project was based on the theory that the key to flipping the “engagement switch” lies within the employee first, and is aided by conditions created by management. In short, you can lead an employee to engagement, but you cannot make them engage. There are ways, however, to help employees realize how thirsty they are for engagement.

The first is translating the word engagement, which is professional shorthand for a complex set of conditions and results, into user-friendly language that makes the connection between the employees’ level of engagement and the quality of their lives.

Many employees simply do not know what engagement means, and if asked “would you like to be more engaged in your job” will shrug their shoulders and say, “sure, I guess so”. When employees realize the quality of their lives are at stake they can make a fully informed, conscious decision about whether or not they choose to engage.

The second is to create and actively market the conditions conducive to engagement at the Team and Departmental level. Dan Pink, in the book “Drive: The Surprising Truth about What Motivates People” pointed to three keys to engagement that correspond with the Acronym, “MAP”:

1. Mastery: People have an inner drive to master their work.
2. Autonomy: Engagement can only thrive in an environment with ample autonomy which allows for creativity and innovation.
3. Purpose: Everyone wants to feel that their work has meaning and purpose and they understand the role they play in the big picture.

CAP has done an admirable job of creating an environment conducive to engagement in many ways, such as:

* Project work as a reward and opportunity to showcase talents
* Autonomy and the opportunity to achieve mastery by participating in or initiating special projects.
* Willingness to bypass hierarchical boundaries as evidenced by Senior Executives’ open door policy, and attendance at engagement meetings
* Senior Management’s enthusiasm, attention and encouragement of innovation and engagement efforts

The Northern Trust’s major investments in diversity, engagement and manager development have created a strong infrastructure. The next step is to increase efforts on the Team and Department levels to maximize the return on those investments.

**Methodology**

* Initiated a “leading from the bottom-up” engagement project, which:
	+ Translated “engagement” into employee language, fueling desire for the potential benefits, (i.e. quality of work life)
	+ Clearly defined the benefits of being job-engaged
	+ Purchased an inexpensive assessment (StrengthFinder 2.0) to build Team identity and recognized individual strengths
	+ Communicated the value of participative leadership and innovation
* Developed a “higher purpose project” when assigned the task of completing a Team Business Plan.
	+ Leveraged the Business Plan assignment as an opportunity to introduce facilitated Team brainstorming exercises
	+ Emphasized participatory decision making and personal choice of role in projects based on employees interests, skills and preferences
	+ Created buy-in and participation of all Team members during the completion of Business Plan and the presentations to management
* Created a Team Vision Statement
	+ Team brainstorming led to the creation of the vision statement, “Leaders in Innovation and Engagement”
	+ As Accounting Analysts this was not a part of the job description, but it expressed the Team’s sense of acting from a higher purpose.
	+ During this process, the Team created and implemented viable projects designed to assist management and co-workers.
* Maintaining/enhancing engagement once developed
	+ Bi-monthly engagement surveys
	+ Engagement meetings and additional project work
	+ Celebrating 2011 Business Plan and preparing for 2012
	+ Plans for spreading engagement to other Teams in Department

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