




Welcome Back

Session 8





Agenda

8:00 – 8:25


- Agenda
- Assignment Review

8:25 – 11:30


- Building a Balanced Scorecard
- Creating a Communication Protocol

11:30 – 12:00


- Assignment for Session 8
- Pre-work for Session 9








Session	Date	Topic	Optional Work	Pre-work	Required Assignments	Due Date
1	6/19/15	Engagement at Your Organization	✓	✓		
2	7/17/15	Your Engagement Baseline	✓	✓		
3	9/18/15	Creating your Employer Value Proposition	✓	✓	EVP Video Outline	10/16/15
			✓	✓	EVP Video	3/18/16
4	10/16/15	Innovation and Leading/Managing Change	✓	✓		
5	11/20/15	Determining Priorities	✓	✓	HIT Process	2/19/16
6	12/18/15	Engaging First Line Leaders	✓	✓		
7	1/15/16	Engaging the Generations	✓	✓		
8	2/19/16	Balanced Scorecard and the Communication Protocol			TBA	TBA
9	3/18/16	Effective Compensation and Reward Programs				
10	4/15/16	Finding and Selecting Engaged Employees				




Reminder – Video Assignment Due on March 18!



Optional Work from Day 7

- Create a plan for attracting the different generations to your workplace.
 - What are you already doing
 - How could you improve what you do now?
 - What are some new ideas you have?


Network with the other participants – ask them for their ideas, share, brainstorm, and collaborate!





Developing a Balanced Scorecard






What is a Balanced Scorecard?

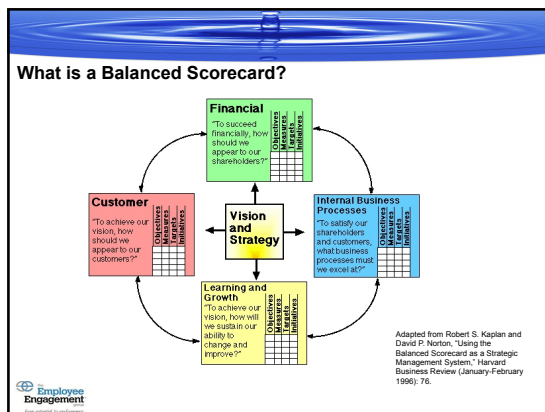
A Balanced Scorecard:

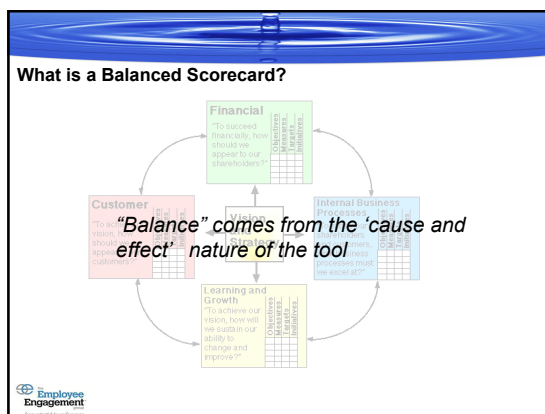
- Is a concept and tools by Robert Kaplan and David Norton – debuted in *Harvard Business Review* in 1992

"The balanced scorecard retains traditional financial measures. But financial measures tell the story of past events These financial measures are inadequate, however, for guiding and evaluating the journey that information age companies must make to create future value through investment in customers, suppliers, employees, processes, technology, and innovation."

- Allows managers to view critical operational factors and their inter-relationships with current and future performance in mind
- Provides focus on organizational vision and long-term success








Why Implement a Balanced Scorecard?

- Link's Company's Vision, Strategy, and Results
- Align organization strategy with the work people do on a day-to-day basis – **Line of Sight**
- Prioritize projects / initiatives

Balanced Scorecard Institute


Employee Engagement




Case Study - Why to Implement a Balanced Scorecard?


Employee survey results showed:

- The Company does not have:
 - easily accessible data
 - communicate monthly progress to all
 - a culture of "stretch" goals
- Employees not aware of:
 - Company's performance against Business Plan
 - their own department or business' performance to Plan
 - their own performance against goals and objectives
 - definition of "average" performance
 - the metrics of "high performers"




Adapted from ENSR
balanced scorecard discussion






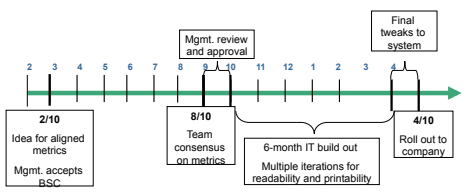
Exercise: What's Your Reason?

Discuss why your company is interested in creating and using a balanced scorecard.






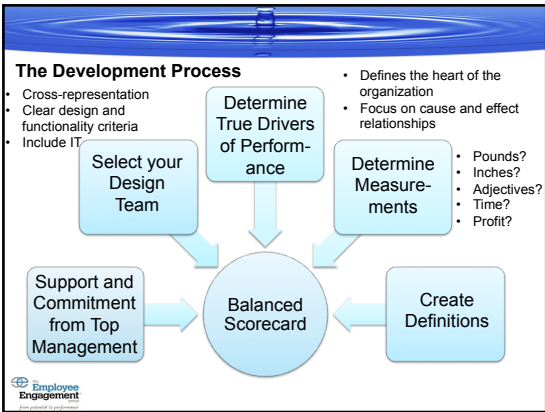
The Evolution of a Balanced Scorecard



"Balanced scorecard structure may take 5-6 months to develop, with total completion in about 1 year"

Balanced Scorecard Basics on Implementation, Valerie Pike



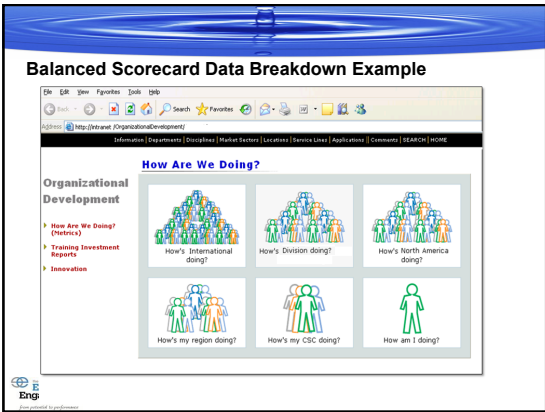


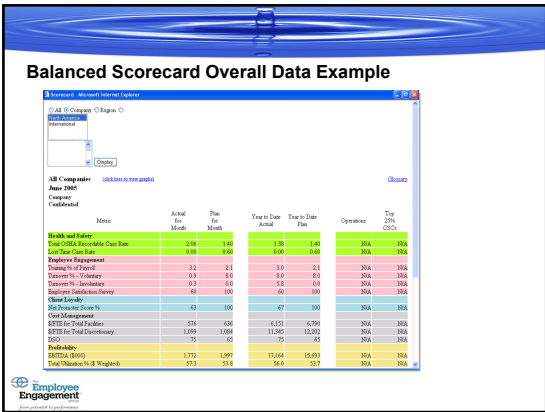
Exercise: What are you measuring?

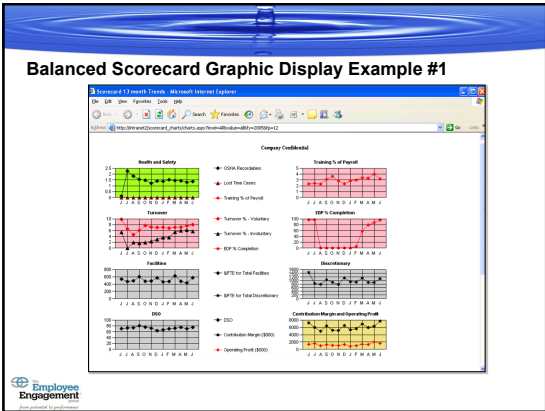
What are you currently measuring at your organization?

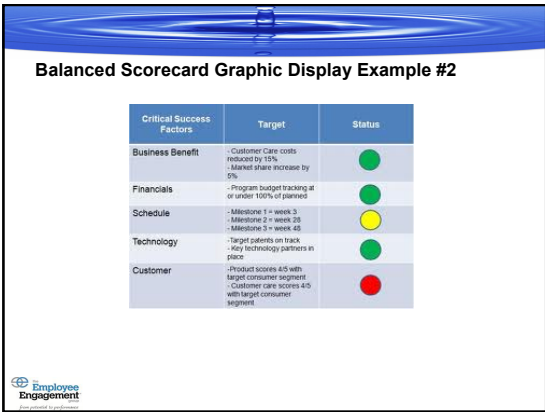
– Should you be measuring other metrics? What are they?

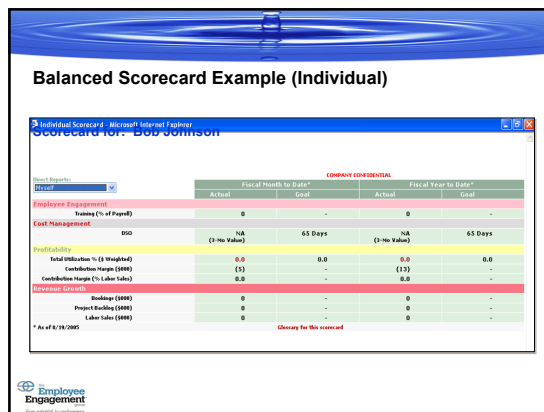
Employee Engagement Group All Rights Reserved

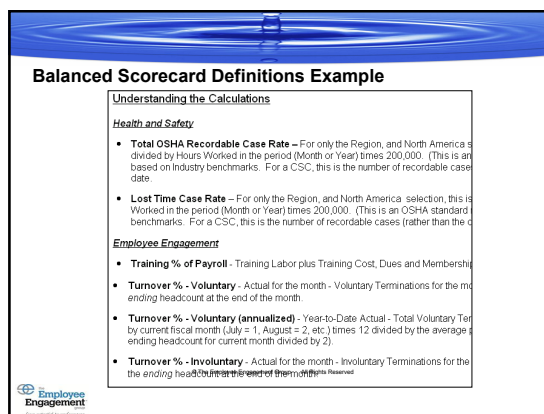


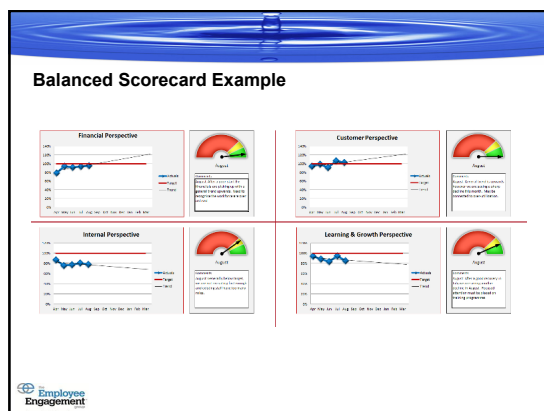


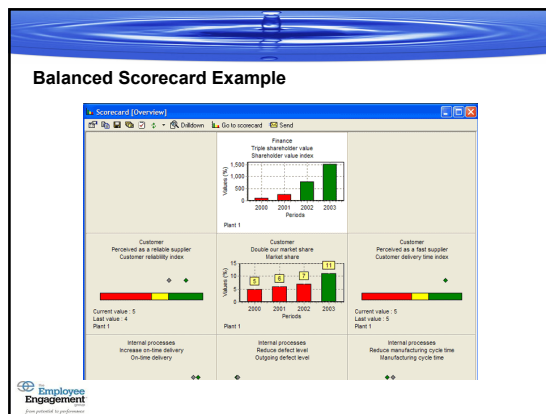


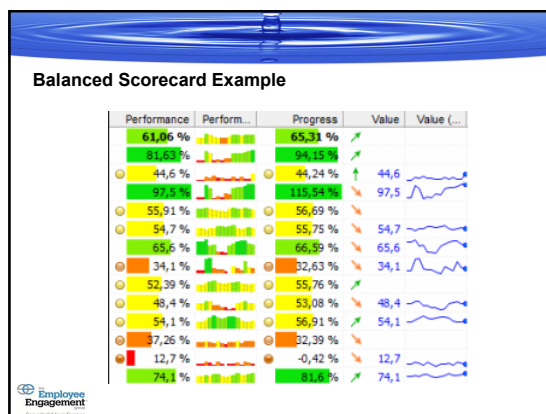


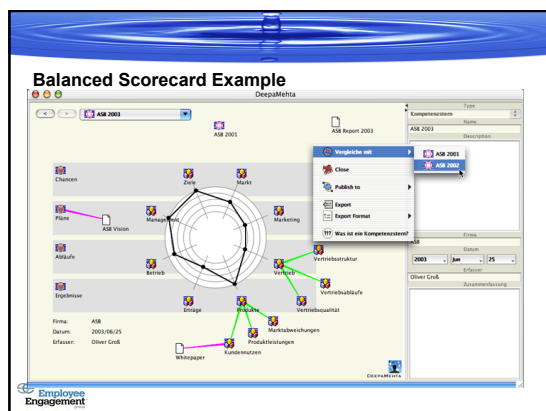

















Exercise: What does your scorecard look like??

In your groups, design your scorecard:


- What does it look like on the screen?
- What graphics are used?
- How is it made to be user friendly?


Report back and begin to determine what your scorecard looks like






To Buy or Build Page 8-3



<p>Buying</p> <ul style="list-style-type: none"> – Pros <ul style="list-style-type: none"> • Off the shelf ready • Professional look and feel • May include design support – Cons <ul style="list-style-type: none"> • Maintenance comes from outside • Difficult to customize • Programming changes can be expensive • Needs tied to costs 		<p>Building</p> <ul style="list-style-type: none"> – Pros <ul style="list-style-type: none"> • Design and customize to your specific needs • Tie easily to your data • Changes done quickly at minimum cost – Cons <ul style="list-style-type: none"> • Significant investment of IT resource(s) • May not have the 'professional look and feel • Longer development time
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The Roll Out

- Communication Plan (consider linking with your Communication Protocol)
- Hold line managers accountable
- Avoid over-engineering
- Include training sessions

Keeping it Vibrant

- Reference in CEO communication (part of your Communication Protocol)
- Use in quarterly operations review
- Prominent place on intranet
- Point employees there to answer their questions
- Communicate positive trends visible on scorecard (and negative trends as an “early warning system”)



Recommendations

- Before anything else, seek management buy-in!
- Make sure someone owns it
- Keep it simple and focused
 - One screen / one page / graphics
- Make it relevant and understandable to all employees
- Treat it as a learning tool – not a control tool!



“Organizations that have not involved employees have not achieved desired results”

- Valerie Pike



Maintenance Costs

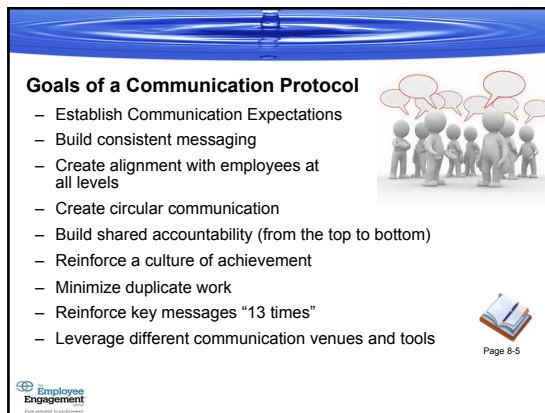
- On-going investment will be different in every organization
- Constant communication and integration with internal processes
- Ongoing IT support and maintenance to keep it fresh

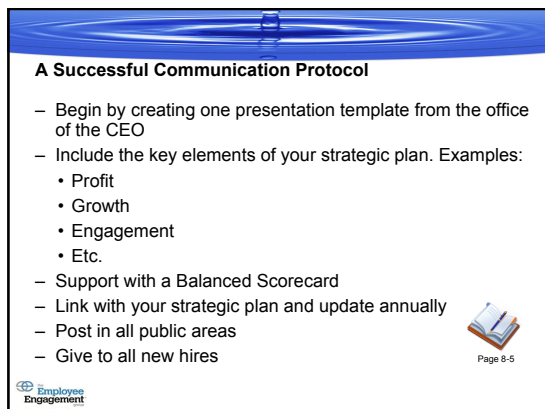


But ideally, the benefits greatly outweigh the costs










Scope	Message/Topic	Leader	Venue	Audience	Frequency
		General Info			
	Company Update				
Corporate	<ul style="list-style-type: none"> Review of Company Metrics (e.g., health & safety performance from risk assessment, etc.) Recent Awards/Occupations Environmental Development Update Environmental News Community relations training to include: <ul style="list-style-type: none"> Review of Company Metrics (e.g., health & safety, etc. recent awards) Occupational Development Update Public Update 	CEO	Email	All Employees	Monthly
Regional	<ul style="list-style-type: none"> Review of Company Metrics (e.g., health & safety, etc. recent awards) Occupational Development Update Public Update 	Regional VP	On-site, conference call, or 130000 meetings	All employees of the region	Quarterly
Office	<ul style="list-style-type: none"> Review of Company Metrics (e.g., performance to date) Recent Awards/Occupations Workforce training Occupational Development Update Recognition Environmental training 	Office Manager	On-site, conference call, or 130000 meetings	All employees of Office	Quarterly/Monthly
Department	<ul style="list-style-type: none"> Review of regional Activity Professional Developmental Opportunities Health & Safety Recognition 	Dept. Mgr.	On-site meetings	All employees of department	Weekly/Bi-weekly
Scope	Message/Topic	Leader	Venue	Audience	Frequency
		General Info			
Corporate	Company Update	CEO	Conference Call	Sr. Mgt. Team	Bi-weekly
Corporate	<ul style="list-style-type: none"> "Strategy" classes Updatations/updates 	CEO	On-site meetings	Sr. Mgt. Team	Quarterly
Regional	<ul style="list-style-type: none"> Performance vs. Plan Accident Update Strategic Initiatives Staff Development Update 	CEO	<ul style="list-style-type: none"> On-site meeting or conference call Env. VP, Safety, HR, Office Managers 		Bi-annual

Engagement Certificate

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Examples: Strategic

	What's the topic or forum?	What are the key messages?	Who's the responsible leader?	Who's the audience?	How do they participate/get the information?	How often?
Where We're Going	5 Year Plan	Prepare and update 5-year Strategic Plan. Review Company performance and progress against vision and strategic plan.	CEO	Senior leaders	On-Site Meeting	Annually (Spring)
	5 Year Service Line or Business Line Plan	Prepare and update Service or Business 5-year Strategic plan	Specific Service or Business Line Leader	Senior leaders representing Company's global environmental service lines	On-Site Meeting	Annually (Fall)
	Company Strategic Council	Prepare and update Company's 5-year Strategic Plan. Review Company performance and progress against vision and plan. Review the Environmental Line outlook and revenue projections. Generate recommendations to achieve strategy. Recognize and celebrate successes.	CEO	Strategic Council	On-Site Meeting	Annually (Fall)
	Fiscal Year Planning Process	Review Company's Operational, Sales & Marketing, and G&A department plans to support Company's operating fiscal year plan.	CEO, COO, CFO, Operations Director & G&A Sales & Marketing	Company senior leaders from Operations, Sales & Marketing, and G&A Functions	On-site meeting Conference Calls	Annually (Winter)
	Employee Development Plans	Prepare Individual Plans. Assess performance against individual goals/objectives and discuss strengths, improvement areas, and professional & career development opportunities. All G&A staff new goals that align with the company's strategy.	All managers manage responsibility	All Employees	On-Site Meeting	Bi-Annually


 Employee Engagement

Examples: Tactical		General Information			
Company Update	Reinforce business priorities, values and mission. Review all elements of strategy and progress toward goals. Provide updates on Company and Company news and key initiatives. Highlight recent award opportunities.	CEO or COO	All Employees	Email	Monthly
Environmental Health & Safety Performance Update	Provide communications aimed at preventing injuries and incidents, and educating employees on wellness, sustainability, security and other EHS-related issues. Share successes in EHS Performance, including our progress on sustainability.	All Environmental Health & Safety Performance	All Employees	Email, Newsletter, and face-to-face meetings in the offices	Monthly
New Employee Update	Update on new mergers and acquisitions, and research and development efforts. Promote innovation across the company.	SVP, New Employees	All Employees	Email	Quarterly
Merge News	Provide updates on progress of merges and acquisitions. Communicate to our systems, or other aspects of our business.	SVP, New Employees	All Employees	Email/instant	As needed
Project/Program Management Update	Share plans, progress and information about: risk management, the Project Delivery System and Integrated Management System, project management training, project management resources, and SharePoint development.	SVP, Office of Risk Management or IP/Project Excellence System	All Employees	Email	Quarterly
Client Survey Feedback	Provide an update on Client Survey results and recommendations.	SVP, Sales & Marketing	All Employees	Email	Bi-annually

Examples: Tactical

What and How We're Doing

	Operational/SLA				
Company Operational Update	Environmental/Health & Safety message, Innovation moment, Review business philosophy, values and mission. Review all elements of strategy and progress toward each. Celebrate recent awards and team accomplishments.	COO/ Operations Directors	All employees within Continental Area of Operations	On-site, all staff meetings in operation with bi- annual on-site Operational Review	Annually
Bi-Annual Operations Review	In-depth review of strategic execution and operating performance following the Balanced Scorecard.	COO and/or Operations Directors	General Managers, DFO, SVP Sales & Mfg. etc.	On-site meeting or conference call	Bi-Annually
Leadership Council Call	Review Balanced Scorecard, market trends and developments, mergers and acquisition updates.	CEO	Leadership Council	Conference Call	Weekly
Global Operations Management Call	Review key, upcoming initiatives.	COO	Continental Leaders, COO Direct Reports	Conference Call	Bi-monthly
Continental Operations Management Call	Review Company and Continental Balanced Scorecard, new team service line and geographic performance outlook, general hiring and training plans, market news and significant opportunities.	Operations Directors	Management Team to Continental	Conference Call	Bi-monthly
Quarterly Update	Environmental/Health & Safety message, Innovation moment, Review business philosophy, values and mission. Review all elements of strategy and progress toward each within operational area. Review Balanced Scorecard. Review upcoming Company training schedule and hiring plans. Celebrate recent awards and team accomplishments. Introduce new hires, note employee tenure anniversaries.	General Manager or Country Manager	All employees within Operational Area	On-site, conference call, or Webinar	Quarterly
Group/ Department Meeting	Environmental/Health & Safety message, Innovation moment, Review recent DFO's, Lessons Learned (Share), local new mission, and local region, skills/knowledge. Review Balanced Scorecard, business development/initiative activities, project and resource scheduling, upcoming Company training schedule and hiring plans. Celebrate recent awards and team accomplishments.	Group/Department Manager	All employees within Group/Department	On-site, conference call, or Webinar	Monthly (or more frequent)


 Employee
Engagement

Examples: Tactical

What and How We're Doing

Sales & Marketing						
"Inside Company"	Report news on recent big wins, cross-selling, opportunities, proposals, awards, and CO's initiatives for Operating Area. Update on Marketing Department initiatives. Highlight DFO's/Topic and proactive work across the company.	Marketing Dept.	All Employees	Email	Bi-weekly	
Sales Call	Report and discuss updates on new strategic opportunities/leads. Discuss sales and marketing initiatives, and sales and marketing best practices.	Sales Director	Sales Managers	Conference Call	Bi-weekly	
Service Line & Industry Sector Calls	Review DFO's performance by Service Line/Industry Sector, opportunities, proposals, awards, business development initiatives, conferences and training opportunities. Introduce new hires. Highlight Intra/Op Collaboration.	Service Line/Industry Sector Leader	Service Line Representatives	Conference Call	Monthly	
Organizational Development						
Company/Employee Engagement Survey	Solicit input on how we're doing on key employee engagement dimensions. Share results, recommendations and action plans.	CEO	All Employees	Email	Every 2 yrs	
Company/Op Organizational Development Update	Share monthly Company University Calendar and progress or news about learning, organizational development, and employee engagement initiatives.	Organizational & Professional Development Director	All Employees	Email	Monthly/Quarterly	
Human Resources Update	Share progress or news about key recruitment initiatives, employee programs and Employee of Choice Committee activity.	HR Director	All Employees	Email	Quarterly	
Total Rewards Program Update	Summarize highlights of existing compensation, rewards, recognition, and benefits plans and programs, and what changes have been introduced.	Director of Compensation	Eligible Employees	Email, Employee Meetings	Annually	
Company						
Company Operational Review	Review performance plan, forecast, and progress on elements of Company Strategic Plan.	CEO, COO, CFO	On-site meeting	Company Senior Leadership	Quarterly	

Employee Engagement


Creating Your Communication Protocol Message

- Find a piece of flip chart paper
- Divide it as shown

	Message	Who Delivers	Venue	Audience	Frequency
CEO					
Next level					
Next level					

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Employee Engagement




Creating Your Communication Protocol Message

Imagine you are sitting with your CEO and discussing communication messages to deliver to the organization:

- What are 4 key elements he/she would want to communicate?
- Through what venues should these be communicated?
- Who is the audience for each message?
- What's the frequency for each message?




	Message	Who Delivers	Venue	Audience	Frequency
CEO					
Next Level					
Next Level					




Creating Your Communication Protocol Message

Look at the level below the C-Suite (this might be a director, division leader, or department head)

- What are 4 key elements he/she would want to communicate?
- Through what venues should these be communicated?
- Who is the audience for each message?
- What's the frequency for each message?
- How does this tie to the message the CEO delivered?




	Message	Who Delivers	Venue	Audience	Frequency
CEO					
Next Level					
Next Level					



Creating Your Communication Protocol Message

Look at the level below the Director, Division, Department (depending on your organization's hierarchy)

- What are 4 key elements he/she would want to communicate?
- Through what venues should these be communicated?
- Who is the audience for each message?
- What's the frequency for each message?
- How does this tie to the message that has been delivered by the other levels?




	Message	Who Delivers	Venue	Audience	Frequency
CEO					
Next Level					
Next Level					



Thought-provoking questions.....



- How to ensure staff have to communicate up?
- How will this tool build alignment?
- How best to leverage social media
- How will people delivering the message be held accountable?
- Is there a way to include customers?







Keeping your protocol vibrant

- Reference in monthly CEO communication
- Keep the same sequence
- Leverage the same template where and when possible
- Use social media in partnership with other forms
- Update annually
- Show communication graphically where possible
- Maintain ongoing communication via a balanced scorecard if possible

Page 8-17





**Your Engagement
Action Plan**



Page 1



Session	Date	Topic	Optional Work	Pre-work	Required Assignments	Due Date
1	6/19/15	Engagement at Your Organization	✓	✓		
2	7/17/15	Your Engagement Baseline	✓	✓		
3	9/18/15	Creating your Employer Value Proposition	✓	✓	EVP Video Outline EVP Video	10/16/15 3/18/16
4	10/16/15	Innovation and Leading/Managing Change	✓	✓		
5	11/20/15	Determining Priorities	✓	✓	HIT Process	2/19/16
6	12/18/15	Engaging First Line Leaders	✓	✓		
7	1/15/16	Engaging the Generations	✓	✓		
8	2/19/16	Balanced Scorecard and the Communication Protocol	✓	✓	Communication Protocol	4/15/16
9	3/18/16	Effective Compensation and Reward Programs				
10	4/15/16	Finding and Selecting Engaged Employees				


Communication Protocol Required Assignment – Due 4/15/16

Required Assignment – Due April15

- Create a draft Communication Protocol document starting with the CEO and cascading at least 3 levels
 - Share the document with your leadership team and discuss


Day 9 Pre-Work


Page 1



Pre-work for Day 9

1. What % of your population is eligible for bonuses?
2. What % of bonuses paid are based on qualitative and what percentage are based on quantitative results?
3. What types of ongoing recognition programs do you have in your organization?
4. Flow chart or outline your recruiting and hiring process
5. Flow chart or outline your onboarding process
6. Identify how you determine 'cultural fit' in an interview
7. Bring a job description and a resume submitted for that job to the next session





See you March 18th!

**Class will be held in our offices at
444 Washington Street, Suite 506
Woburn, MA 01801**

