

The Enterprise Engagement Process[©]

A training, facilitation, and consulting process designed to help organizations achieve their goals through the effective implementation and management of engagement strategies.

Designed for:

- For-profit and not-for-profit organizations seeking to connect engagement with goals and objectives.**
- Consultants, agencies and other firms seeking to bring engagement solutions to their clients.**

For more information, contact: 914-591-7600, ext. 230 or info@theeea.org

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I. OVERVIEW

As more companies recognize the value of having engaged audiences of customers, distribution partners, employees, and vendors, many have undertaken long-term efforts to implement enterprise-wide strategies that address all of the elements critical to profiting from engagement.

Properly designed surveys yield invaluable data about engagement, its impact on performance, the potential causes for disengagement, as well as potential solutions. The ultimate reward is to use that data to identify and institute an ongoing process not simply to react to engagement problems or opportunities, but to build engagement into your business strategies and tactics so that it becomes a sustainable part of your efforts to meet organizational goals and objectives in a measurable way.

The Enterprise Engagement Alliance has launched a formal Enterprise Engagement consulting practice based on helping organizations bake engagement into their business strategies and tactics throughout or within specific parts of an organization. Having engaged people is not enough: the goal is to proactively benefit from engagement on an ongoing basis to meet annual or other organizational goals. This formal strategic planning and management process for engagement, developed over three years based on research conducted by multiple organizations over a 20-year period, as well as on input from dozens of experts, provides organizations a strategic yet flexible process for harnessing the power of engagement to achieve critical business goals and objectives.

THE CHALLENGES

As more organizations embrace engagement, they confront multiple critical challenges:

1. They have no formal roadmap for implementation based on research and best practices; they often have to wing it. There is a question of how to translate theory into actionable, measurable steps with clear roles and responsibilities.
2. Engagement can involve multiple issues that change regularly based on objectives and business conditions and for which there is not a one-problem-fits-all solution.
3. Organizations often house tactical elements of engagement in different departments, such as communications, HR, marketing, or training, creating potential conflicts for resources that thwart effective implementation and alignment across the organization.
4. Unlike in the advertising, accounting, and other fields, organizations lack easy access to experts who can provide holistic guidance on the issue of engagement to provide a zero-based strategic and tactical plan without regard to the specific engagement

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products, services, or solutions they wish to sell you or about which they are specifically experienced.

THE ENTERPRISE ENGAGEMENT PROCESS

The EEA Enterprise Engagement Process© is focused on the tactics that organizations can more quickly address within their current infrastructure, such as communications, learning, rewards and recognition, and collaboration tactics, rather than on longer-term compensation, benefits, or organizational design issues handled by other practices.

The Enterprise Engagement Process begins with a simple assessment tool known as the Enterprise Engagement Enterprise Benchmark Indicator, which enables you to obtain a quick snapshot and benchmark of your organization's Enterprise Engagement practices. The tool surveys your key management to obtain their assessment of your Engagement practices and compares the results to best practices and an aggregate of other organizations. This is followed by a systematic process involving a collaborative consensus-building session with key management in your organization accountable for specific audiences (consumers, distribution partners, different types of employee populations, vendors, etc.) or tactical tools, such as training, HR, marketing, or communications. This follow up more deeply assesses your current Enterprise Engagement practices and identifies how to leverage your current resources (rather than additional resources, if possible) to implement an effective engagement strategy.

The deliverable is a strategic engagement plan for your organization, division, or department that:

- Addresses all of the critical engagement factors in the context of your organization and its goals and objectives;
- Leverages, whenever possible, resources already in place;
- Identifies and clarifies specific resource conflicts or other potential obstacles to implementation,
- And includes an ongoing process for making sure the plan is followed and results measured.

This process may also identify the need for some sort of outsourced solution, in which case your EEA consultants can help you:

- Define the program specifications;
- Identify and help select the best outsourced solution for your organization,
- And manage, if necessary, the deliverables.

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The Enterprise Engagement Process brings to engagement the sort of discipline fostered in manufacturing by the use of Six Sigma or Total Quality Management processes. The Enterprise Engagement Process addresses the fundamental human elements often overlooked by typical business management processes that often undermine long-term success.

II. BACKGROUND

More and more organizations understand the connection between financial results, loyal customers, and engaged employees and vendors. Over 20 years of research by many recognized organizations has clearly identified the connection between engagement and financial results. The sense of urgency has been heightened by the advent of the Internet, blogs, Twitter, and other social networking tools that have shifted tremendous power to consumers and employees who now have readily accessible tools for sharing their views about companies to do business with or work for. This creates both the opportunity for huge efficiencies in marketing and recruitment through the power of word-of-mouth, as well as great dangers for those who offend customers and employees.

Many companies begin the journey toward Enterprise Engagement by conducting surveys of employees, channel partners, and customers. They face multiple challenges:

- Most of the survey providers either do not provide anything more than recommendations as to how to address engagement issues, or provide only one type of solution based on the organization's approach or expertise. Many solely address management training, when research shows that so much else can come into play when it comes to connecting engagement with financial results in large organizations.
- The survey process tends to be reactive, as many efforts focus on identifying challenges, gaps, or opportunities, rather than identifying the specific strategies and tactics that can provide the basis for proactively profiting from engagement over time.
- Organizations lack a formal, scientific framework for baking engagement into the culture and businesses processes and measures—there is almost nothing taught about formal engagement strategies in business schools, and the subject is barely covered in the business media.

THE FUNDAMENTALS OF ENGAGEMENT

A meta analysis of dozens of research studies conducted over the last 20 years has identified the following elements critical to profiting from engagement:

LEADERSHIP: A consensus around a clear vision, goals, and objectives at all levels of the organization.

ASSESSMENT: An understanding of the organization's current engagement strategies and tactics as measured against best practices, as well as an assessment of current levels of engagement, alignment, understanding of corporate goals, ability or willingness to contribute to them, loyalty, willingness to share information, etc.

ALIGNMENT: A shared understanding of the vision, goals, and objectives by all critical audiences—customers, distribution partners, employees, and vendors.

BEHAVIORS: An understanding of the specific actions required of each audience to achieve the goals.

COMMUNICATION: A tactical strategy for making sure all of the audiences know the mission, goals, and objectives, and how they can contribute, including: an employee engagement portal; electronic or print newsletters; posters; meetings; promotional products, etc.

LEARNING: A tactical plan for making sure people are capable of doing what is asked of them, including online and face-to-face training and mentoring.

REWARDS AND RECOGNITION: A tactical plan for fostering a positive emotional environment in which people have fun and feel valued by the organization, their peers, and their significant others in a way that creates positive buzz, supports communication, and is clearly distinguished from compensation or pricing issues.

COLLABORATION: A continuous means of fostering information sharing and suggestions, along with a rigorous means of identifying marketable or productivity-enhancing ideas.

MEASUREMENT: A clear means of measuring results against the goals and objectives and behaviors identified as critical to success.

The EEA training and consulting practice brings to clients a formal process for implementing and sustaining engagement strategies specifically designed to help organizations achieve their goals. The process was developed in conjunction with the

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Enterprise Engagement Alliance based on extensive research and input from executives from dozens of corporations and experts in many areas of engagement.

III. DETAILS ON THE ENTERPRISE ENGAGEMENT DEVELOPMENT PROCESS

ASSESSMENT

The process begins with a detailed assessment of your organization's current engagement levels (customers, channel partners, various employee populations, vendors, etc.) and its engagement practices. Your organization's current level of engagement is based on the results of engagement surveys provided by any number of organizations. If your organization does not currently employ such tools, the EEA can help you find the right solutions.

To initiate the process of assessing your organization's engagement practices, we send a link to our Enterprise Engagement Benchmark Indicator to the key management you designate in your organization, which they can use to fill out a questionnaire to gain their collective assessment of your organization's current engagement practices. We compare those findings to best practices, the aggregate of other organizations that have used the tool, and develop a preliminary gap analysis.

Following this preliminary assessment step, we conduct a meeting of your key management accountable for the audiences involved with your engagement efforts, and the various tactical functional support areas that could be included, such as communications, training, collaboration, rewards and recognition, and measurement. These are the people whose consensus, buy-in, and understanding will be required if you are to effectively align your engagement effort across the targeted organization.

This half-day meeting, known formally as a "nominal group technique," involves a round-robin process in which each participant is asked the following questions in order to ensure that there is a consensus.

- What are the organization's mission, goals, and objectives?
- What are the key behaviors required of the targeted audiences necessary to achieve those objectives, and who is accountable for the specific audiences, if there are more than one?

- What are the communications processes in place to communicate with these audiences; who is accountable; what obstacles or challenges are there in using these resources to support the engagement effort?
- What are the learning processes in place to educate these audiences; who is accountable; what obstacles or challenges are there in using these resources to support the engagement effort?
- What are the rewards and recognition processes in place; who is accountable; what obstacles or challenges are there in using these resources to support the engagement effort?
- What are the collaboration processes in place to foster information-sharing among these audiences; who is accountable; what obstacles or challenges are there in using these resources to support the engagement effort?
- What are the measurement processes in place track results; who is accountable; what obstacles or challenges are there in using these resources to support the engagement effort? Can these measurement processes be translated into bottom-line benefit to the organization? How?

The purpose of this meeting is to:

- Build a consensus around the opportunity to improve performance through engagement;
- Identify both the resources available to implement an engagement strategy, as well as the potential obstacles that could stand in the way of effective implementation;
- And to provide the information necessary to create your organization's formal strategic plan.

While this information can be obtained through individual interviews, the collective process helps foster buy-in, collaboration, and consensus.

To complete the assessment process, the team conducts individual interviews with audience or functional leaders as needed to further flesh out opportunities or challenges related to the final engagement strategy.

STRATEGIC PLAN DEVELOPMENT

Based on the findings of the engagement survey and engagement practices assessment process, we develop a formal business plan that includes every element of your effort, including:

- The key mission
- Goals and objectives
- Overall roles and responsibilities
- Audiences and key behaviors required of each

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- Overall timeline
- Recommended learning strategies; who is accountable; timeline
- Recommended communications strategies; who is accountable; timeline
- Recommended rewards and recognition; who is accountable; timeline
- Recommended collaboration tools; who is accountable; timeline
- Recommended performance measures; who is accountable; timeline
- Recommended launch plan

The goal is to bake the engagement strategy into your current organization either utilizing current resources, or to identify if you need additional internal or external resources.

The strategic engagement plan generally is shared with all of the stakeholders to identify any final objections, challenges, or opportunities.

IMPLEMENTATION

Once the strategic plan is developed, your EEA team can help ensure that you have the proper implementation process in place. This can include helping you to identify specific types of companies that can assist you; developing effective Requests for Proposals, finding and selecting appropriate suppliers. The EEA does not earn commissions from third-party suppliers that it identifies for clients.

FOLLOW UP

To help ensure that you achieve your goals, the program can include:

- Monthly check-ins for the 1st three months
- Quarterly reviews for the next 3 quarters
- An annual assessment and plan update

THE RESULTS

The strategic plan includes a formal method for measuring the achievement of the objectives, the behaviors required to achieve them, and an analysis of outside factors that affected the results either way. The EEA can assist as desired with the monitoring and evaluation of that data.

IV. TRAINING FOR SERVICE PROVIDERS

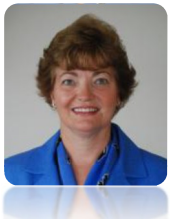
The EEA can provide training on this process to consultants, marketing agencies, incentive companies, and others seeking to assist their clients with Enterprise Engagement strategies.

V. WHO'S WHO

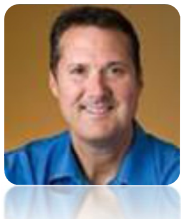
The EEA senior consulting team consists of experts with over 20 years each of in-the-field experience and who were involved with the development of the Enterprise Engagement curriculum, including:



Bruce Bolger, author of two formal curricula on incentive and recognition program design, with 20 years of involvement in research, program design, and facilitation.



Melanie Lewis, most recently Director of Commercial Engagement, AstraZeneca, and a consultant to the development of the Enterprise Engagement curriculum.



Allan Schweyer, a founder of the Center for Human Capital Innovation as well as of the Human Capital Institute before that, and is author of numerous books on human capital and Talent Management. Allan authored the Enterprise Engagement curriculum.



Rodger Stotz, current Chief Research Officer of the Incentive Research Foundation, with over 30 years of experience in incentive and recognition program design and internal branding. He teaches variable pay for WorldatWork.

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