AGILE ENGAGEMENT

How to Drive Lasting Results by Cultivating a Flexible, Responsive, and Collaborative Culture

SANTIAGO JARAMILLO | TODD RICHARDSON

WILEY

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To our loving parents, who prepared us to face life's challenges with humility, energy, and appreciation for all the blessings bestowed upon us.

To all employees who desire true engagement in their work lives. May this book help enlighten organizations around the world and make our dream of full engagement for all workers a reality.

To all bosses, coworkers, and partners who demonstrate the power of engagement and the amazing results that are possible when hearts, minds, and hands align at work.

Thank you.

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Preface

Behind every worker—including you—is a unique combination of motivations. It gets you up in the morning when you would rather stay in bed. It keeps you coming back to work when you would rather quit. It makes you want to do better than you did yesterday, to *be* better.

For some people, they work in order to provide for their families, to send their kids to colleges, to care for aging parents, or to put food on the table while their spouses pursue educational ambitions. For others, they appreciate the mental or physical challenge, the opportunity to travel, or are personally passionate about the subject matter. Or, perhaps, they genuinely enjoy their colleagues and their managers, and that's enough to keep them coming back day after day.

Though the *why* behind each worker differs, the desire for professional engagement is universal.

Given the individuality of motivation, however, how are companies supposed to engage their workforces at large? How can they build and develop cultures that advance both organizational goals and the individual goals of every worker? It's not easy, but it is possible. And this book shows you how.

The topic of employee engagement and workplace cultures is not new. In fact, in recent years, it seems like every corporate blogger, speaker, and consultant touts the importance of culture and employee engagement. Theoretical discussions abound, but few people have put forth concrete strategies that help get you from point A (unengaged) to point B (fully engaged). The workplace is evolving so rapidly, in fact, that employees are feeling less and less engaged with their work. Collectively, we are in the midst of an engagement crisis. The only way out is to focus on people over processes, real engagement over cookie-cutter programs, consistent intentionality over passive manipulation, and healthy change over rigid planning. For those already familiar with technology management philosophies, what we are suggesting is the application of agile principles to the world of employee engagement.

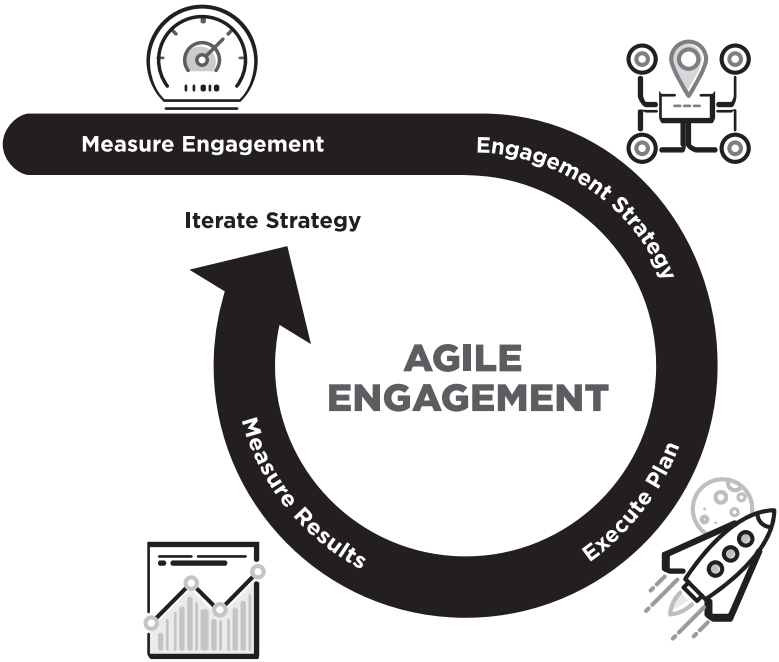
People, and consequently employees, are extremely complex. There is not a single set of engagement rules that can be outlined during your company launch party that are guaranteed to still work at by the time you reach your 10-year anniversary. People change. Companies change. Your approach must change alongside them. And you must involve employees in the process.

Enter *Agile Engagement*, which provides practical advice and counsel to demystify engagement and culture. We wrote this book to dramatically impact the way the world works and the way we all work within it. We wrote this book as a way to apply the proven principles of agile software development to the world of employee engagement. Most of all, we wrote this book to help heighten the level of engagement for *all* workers—not only managers, not only white-collar, and not only high-tech workers. *All* workers.

For engagement is, at its core, the great equalizer.

True engagement can be attained (and sustained) by *anyone*, *anywhere*, doing *anything*. However, engagement doesn't just happen. It requires intentionality, strategic workplace culture building, an employee engagement plan that is unique to your organization and your workers, and a commitment to continuous measure and improvement.

In the following pages, we will help you understand the importance of engagement and workplace culture. Moreover, we will give you a proven framework within which to create, build, and execute your engagement strategy over the long haul. We call this framework the Engagement Canvas and it leverages the powerful Emplify Score tool.



Agile Engagement Framework

The framework we utilize infuses agile principles throughout the employee engagement process. Consistent and frequent measurement of employee engagement reveals real insights that then guide engagement strategies and action plans. This process repeats itself, because the opportunity to drive engagement should be an unending pursuit.

The Engagement Canvas is our answer to a troubling trend we noticed in the course of our work. We talked with many executives and HR leaders who told us that culture was a key aspect of their companies' future successes. They painstakingly explained how seriously they took employee engagement. Then, when we asked those same business leaders to describe their cultures (current and desired) . . . crickets. More troubling, when we asked how they were cultivating their workplace culture and driving employee engagement, we received blank stares.

Mind you, these business leaders are highly successful businessmen and businesswomen in their respective fields. They have mastered complex supply chain issues, cross-market campaign difficulties, technical security challenges, and more. But when it came to culture and engagement, they were comparatively dumbfounded. Try as they might, they did not understand how to construct an engagement strategy or measure success.

Engagement is too important for such widespread confusion. We are on a mission to provide the clarity organizations so desperately need. Alongside us on this journey are our guest contributors, both operational and strategic leaders, who provide their insights, commitment to, and appreciation for workplace culture and employee engagement. Spanning a variety of industries, company sizes, and geographies, these culture gurus prove that powerful engagement is not only achievable but well worth the effort.

We also provide our own insights gained from professional careers spent launching, forming, and perpetuating powerful company cultures. We originally met at ExactTarget, a fast-paced Midwest-based, technology company. ExactTarget epitomized a thriving culture with highly engaged employees. The culture was branded "Orange" after the company's primary brand color (Pantone 144). We experienced firsthand the importance of making culture a priority and saw the business impact of truly engaged employees. An exceptional culture was the driving force behind the company's successful initial public offering, listing on the New York Stock Exchange, and ultimate $2.5 billion sale to tech juggernaut Salesforce.com.

ExactTarget veteran and now Yext chief marketing officer Jeff Rohrs explained the experience this way:

> I was involved in the initial conception of "Be Orange" at ExactTarget, an effort to give our culture, passion, commitment, talent, and energy a name. Having that effort tie into our core brand

> color—and having that color represent the best of who we wanted to be—helped everyone understand what culture meant within our organization.
>
> Another key was not having Marketing or HR solely own culture. It was owned by our people, and they added so many great ideas and activities to the expression of our culture that every engaged employee felt a sense of ownership. Having the shorthand of what "Being Orange" meant even helped accelerate our hiring efforts by making it easier to evaluate people for key skills that were needed to work in an organization where change was a constant. (Rohrs, 2016).

Former ExactTarget vice president of global total rewards, talent, and HR operations and current Appirio senior vice president, human resources, Ellen Humphrey remembers the Orange culture with similar fondness:

> We had an engaging and exciting culture at ExactTarget because (a) we were transparent about the business and its goals; (b) we empowered everyone to live out our culture; (c) our employees believed that our senior leaders lived out the culture; and (d) we were winning in our space. I think winning makes a big difference. Our employees were proud to be part of a company that was growing, landing the big customers, and opening new offices. The collective momentum attracted high-caliber talent, which led to more winning, which continued to engage employees, which kept the culture amped, which attracted more talent. Rinse and repeat. (Humphrey, 2016)

What we experienced at ExactTarget was so special that we wanted to help more organizations experience the power of culture and engagement to drive business results. So we joined forces and created a mobile-first employee engagement app software-as-a-service platform called Emplify. We help companies develop and implement engagement strategies through the use of native, branded, mobile apps. With our employee engagement platform, employers can finally foster a deeper level of employee engagement and measure their success in real time.

As you continue reading, remember that culture and employee engagement are components of—not replacements for—good ol' business

results. Terri Kelly, president and chief executive officer of W. L. Gore & Associates, explains that "If you're not careful, the culture can become the outcome and become disconnected from achieving the desired business result. The culture needs to be the 'how' you achieve results, and you must continue to monitor and evolve your practices and values to ensure there is strong alignment to achieving the business outcomes" (Kelly, 2016).

Cheers to the start (or continuation) of your workplace culture and employee engagement journey. We are here to serve as your guides, and we look forward to helping you unlock the potential that comes from having truly engaged employees and a winning culture.

Part

The Engagement Engine

Chapter 1

Engagement and Culture Redefined

(Or, Why Culture Belongs in the Boardroom)

Culture is the engine behind engagement. It is the power and the driving force, plain and simple. Employee engagement and culture get plenty of lip service in the business world, and plenty of books have been written on the subjects. We are not here to add hot air to the existing conversation. We are here to change the conversation completely.

This book is for those who are already convinced of and believe in the power of workplace culture. This book is for those who want to take action and transform culture and engagement in their organizations. This book is for those who believe culture should not be relegated to a back office, but rather invited with open arms (and a fistful of confetti) into the boardroom.

Supporting evidence abounds. It's widely accepted that positive cultures lead to more engaged employees, and more engaged employees sustain positive cultures. But it has also been proven that positive cultures and high levels of employee engagement drive tangible bottom-line benefits. An engaged workforce helps boost profits, increase employee loyalty and tenure, and heighten customer satisfaction.

Yet despite all the culture talk and widespread alarm around the engagement crisis in business, engagement levels remain stubbornly low. Why? Because most leaders are at an utter loss of how to affect real change in their organizations.

Before we dive too deep in the culture and engagement trenches, however, we should briefly define culture and engagement. Many books, articles, blogs, vlogs, podcasts, and academic pieces have been written about these topics, each with differing definitions. How many smart people does it take to define a pervasively common topic? A dizzying amount, apparently, for there is no public consensus.

For the purposes of this book, we studied hundreds of definitions and arrived at the following.

Defining Employee Engagement

We define employee engagement as an employee's emotional and intellectual connection with an employer, as demonstrated by his or her motivation and commitment to positively impact the company's vision and goals.

Not surprisingly, countless elements can impact positive or negative employee engagement, but we consider the most potent to be the following:

- *Strategic Alignment*. Employees can both verbalize and actualize the core business strategies.
- *Understanding of Success*. Employees understand their organizational, departmental, and personal success metrics and tangibly grasp their contribution to the company's overall success.
- *Clear Communication*. Employees trust the company because of coherent and frequent contact, timely feedback, and clear expectations.
- *Workplace Vibe*. The overall environment fosters effective work in everything from the physical workspace to interactions between employees.
- *Growth Paths*. Employees have the opportunity to grow their skills through new work challenges and positions over time, in both managerial and independent contributor roles.

Employers directly influence employee engagement, but workers remain independent, unique humans. What drives engagement for one person may be different from what engages the person sitting next to him

or her. Furthermore, what drives an employee's engagement today may not be the same thing that drove his or her engagement two years ago (or two months ago). One of the unending challenges as an employee or as a leader is the need to remain agile, constantly reevaluating what engages you, your team members, and your constituents.

Defining Workplace Culture

We define workplace culture as the customs, social expectations, and attitudes formed around work and personal interactions in the work environment.

The nature of our business exposes us to a wide variety of companies with all shapes, sizes, and cultural maturities. One of the first questions we always ask when we sit down with a new company is, "How would you describe your culture?" We quickly follow with a second question: "How would your employees describe your culture?" Child's play, right? Wrong. We are flabbergasted by how frequently and dramatically those two answers differ.

What's going on? Why would leadership ever tolerate such stark contrasts in how employees work alongside each other at the same company, in the same office, toward the same goals? More times than not, it boils down to a classic lack of intentionality. It is the responsibility of leadership to clearly acknowledge the workplace culture, facilitate discussions on its positive and negative aspects, and strategize and improve it over time.

Engagement in Action

Employee engagement looks different to everyone. Here are some examples from business leaders who understand the importance of culture and engagement to business success.

What do engaged employees look like?

Here is what prominent business leaders had to say.

- "Energized, aggressive, and creative. Culture means having a passion for our customers, colleagues, and company (3 Cs)."—Brad Morehead, CEO, LiveWatch Security
- "People who, when they get in the cars in the morning to go to work, look forward to getting there four out of five days. When they leave their jobs, they also feel like they have accomplished

something four out of five days."—Hank Orme, Former President, Lincoln Industries

- "People who want to come do work they love with people they enjoy. Engaged employees like working with other employees who challenge them to grow, learn, and build excellence as a team." —Nicole Bickett, Chief Administrative Officer, Mainstreet
- "One who routinely gives discretionary effort."—Chuck Hyde, Soderquist Leadership
- "An engaged employee participates in and contributes to the culture of the company."—Rob Edwards, Director of Engineering & Race Operations, Andretti Motorsports
- "An individual who clearly shows through his or her emotions and communications that he or she enjoys coming to work every day and feels empowered to make important decisions that impact the company."—Wil Boren, Former Vice President and General Manager, Zimmer Biomet
- "An engaged employee is, first and foremost, aligned to the vision and mission of the company and aware of and energized by how his or her role fits into it. These qualities drive employees to achieve outstanding results for the organization, as well as his or her career aspirations."—Blair West, Director of Corporate Communications at Cummins, Inc.
- "Someone who takes pride in her work, cares about what she's doing, engages in customer communication, and is present in her conversations and work."—Laura Angotti, Owner of Rowdy Sprout
- "An engaged employee is intrinsically motivated to go above and beyond on behalf of her employer. She is enthusiastic about the work she does and is an evangelist for her employer. She gets satisfaction from her work and takes pride in her contribution to the greater organization."—Ellen Humphrey, Senior Vice President, Human Resources, Appirio
- "Someone who shows up with a great attitude ready to do whatever it takes to get the job done."—Clay Robinson, Co-Founder and Owner, Sun King Brewing
- "An individual who goes beyond his job description to help others, seek out additional opportunities for growth, and contribute

to the culture both through active participation and interest in fellow coworkers."—Jeff Rohrs, Chief Marketing Officer, Yext

- "Someone who is excited to come to work every day, believes deeply in our vision and mission, acts like a team player, has incredibly high expectations for himself and his colleagues, prioritizes what is best for our collective movement above individual goals or motivations, and operates with integrity at all times."—Rebecca Thompson Boyle, Former Executive Director, Teach for America
- "Interested and enthusiastic about work, has meaningful relationships with colleagues and participates in the life of the organization, and willing to go above and beyond."—Tom Froehle, Chair and Managing Partner, Faegre Baker Daniels, LLP
- "Engaged employees accept empowerment and drive innovation independently and as a fluid organization."—Scott Kraege, Co-Founder and CEO, MOBI
- "Engaged employees are passionate about their work and feel they are making a meaningful impact on the organization. They have a strong sense of personal ownership and responsibility for the success of the organization. They feel connected to the mission and vision, and they go beyond their core commitments to help others and support the broader goals of the company."—Terri Kelly, President and CEO, W. L. Gore & Associates

Chapter 2

Happiness Versus Engagement

(Or, Why Free Snacks Fall Short)

Meaningful engagement cannot simply be bought. No amount of holiday bonuses, Starbucks gift cards, or frequent flyer miles will guarantee employees' loyalty and engagement. Frankly, workers are too smart for that. They know better than to base their loyalty on fleeting rewards or accolades. They require a deeper connection to their company, leaders, and coworkers. They want to understand their place in the bigger picture and know that what they do matters and is appreciated.

Most people spend around a whopping one third of their adult lives working. The idea of spending that much time working in a negative workplace culture is insufferable. But the remedy for unhappiness at work is not happiness. It is engagement.

Netflix, Patagonia, and Zappos attract a lot of public attention because of their free massages, surf breaks, and unlimited vacation policies. Those practices are easy to pinpoint, weird enough to make good news stories, and fun to talk about around the watercooler. At first glance, it may appear that these fun fringe benefits make their employees happy. But the truth is, happy employees are not the same as engaged employees, and those perks are not the driving force behind these companies' culture successes. They are only

the tip of the iceberg—the proverbial icing on top of powerful, optimized organizational cultures.

When Gallup released their alarming State of the Global Workplace study revealing that only one-third of U.S. employees are "engaged" at work, many organizations scrambled to remedy this unengagement plight, looking for quick fixes and easy ways to increase happiness in the workplace (Crabtree, 2013). Gallup followed up to the frenzy, saying that "Indulging employees is no substitute for engaging them" (Sorenson, 2013). Or as Jim Clifton, CEO of Gallup, succinctly put it, "The idea of trying to make people happy at work is terrible" (Crowley, 2014).

Let's face it: Free lunches and snacks have little direct impact on long-term human performance (Sorenson, 2013). I can be happy at work without acting in the best interest of the organization. Scanning Facebook and catching up with an old friend on work time make me happy, as does saving money by refilling my personal stock of home office goods from the supply cabinet. Happy, but not engaged. We do not need more cool perks, we need more meaningful investment in growing our people. Focusing on short-term pleasures over long-term engagement is not sustainable and may even disillusion people over time.

Any office can buy a quick-fix pinball machine and sit perplexed as nothing changes. Those perks are well intentioned but are not change agents. We can admire the companies who work this way, but we admire them for how thoroughly and intentionally they foster a positive workplace culture, not for a day-to-day focus on fun. These hailed companies don't just brighten employees' Fridays, they engage them constantly. Moral of the story? Focus on strong culture, not free candy.

Ultimately, engagement is about knowing the organization's purpose and our purpose within it, having the tools to perform at our best, and having passion to contribute to our full potential. It is about maximizing strengths, making meaningful contributions, and feeling valued. Even the best office perks will not change a boss who is a jerk, a job with no potential for growth, or mind-numbingly boring work. Highly engaged employees can even seem like a handful at times. They care too much, they have wild ideas, they push the envelope, and they get frustrated when things fall through. At Netflix, they recognize it as the "person who picks up trash lying on the floor" (Hastings, 2009). At Basecamp, they call it "giving a damn" and list it as one of their core values (We the Basecamp). It can't all be sugarplums. A little dissatisfaction is natural and can fuel drive, productivity, and improvements.