



Performance Group

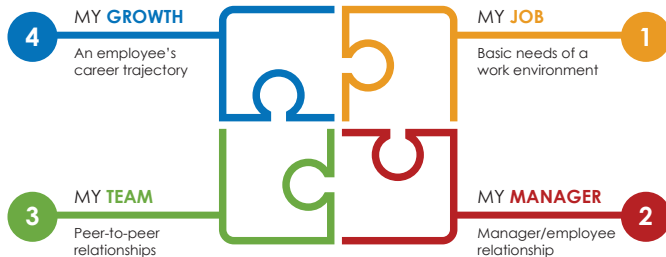
# MANAGING FOR SUCCESS





# WELCOME TO EVOLVE'S MANAGING FOR SUCCESS GUIDE

This step-by-step guide outlines practical, everyday ways to build employee engagement as you manage, coach, and empower your team members. Each item on the Engagement Survey links to a Step which includes management tips, context, examples of “how it sounds in practice,” and sample team meeting agendas designed to help build engagement. Remember, employee engagement is not just a survey, it’s how you manage for high performance.



# ENGAGEMENT CATEGORY – MY JOB



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**Survey Item #1** – I know what is expected of me at work.

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**Management Tip** – Consistently create clear expectations for your team members.

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**Context** – Expectations are the tasks, activities, and metrics that team members are held accountable to complete. It is important to revise expectations as frequently as needed.

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# MANAGEMENT STEP 1



## How it sounds

1. Let's discuss the expectations that I have for You/the Team.
2. Are you clear on what I expect of you today/this week, etc.?  
Can you feed it back to me for clarity?
3. Hey, I have a few expectations that aren't being met. Could we discuss how we might get those completed and where you might need assistance?

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**Pro Tip** – Begin to purposefully use the term “expectations.” This can be used with your team members and on an inter-departmental level as well. By utilizing “expectations,” it may assist in de-escalating stress and emotion in the workplace.

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**Ask Yourself** – Have I discussed expectations with my team as often as needed and have I been clear about those expectations?

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# EXPECTATIONS MEETING

## **Complete the following steps:**

1. Gather team together for a 10-minute meeting.
2. Review the team's productivity from the previous week (reports may be needed).
3. Define the team's productivity from the last period (on target, below target, above target).
4. Describe how last period's performance will affect the team's work going forward (is there productivity that needs to be increased or maintained?).
5. Be specific in your expectations.
6. Close the meeting with these three questions:
  - Does everyone understand what is expected of them?
  - Do you have everything you need to meet these expectations?
  - Do you need any help or is there anything that you have been asked to do that is not a strong point for you?

# EXPECTATIONS MEETING NOTES



DATE	COMMENTS

# ENGAGEMENT CATEGORY – MY JOB



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**Survey Item #2** – I have the tools, information, and resources I need to complete my work.

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**Management Tip** – Make sure that your team members have all they need to deliver on the expectations you've set.

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**Context** – Depending on the task at hand, team members could need a variety of things to efficiently complete the expectations at hand. Without proper tools, time, training and resources, team members could struggle to deliver completing necessary expectations. Please note that you may need to manage team member expectations as to your ability to provide certain items.

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# MANAGEMENT STEP 2



## How it sounds

1. Do you have everything you need to complete the expectations I laid out?
2. Do you have enough time to meet expectations we've established?
3. Are you clear on the procedures, or do you require more information?

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**Pro Tip** – Resources needed could be tools, software, training, information, time, headcount, and budget (as examples). Be sure to “contract” your team members for performance. This means if you've provided resources, you should expect the expectations to be met and/or exceeded.

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**Ask Yourself** – How often have I asked about resources? Have I provided everything within my power to help my team members to be successful?

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# TOOLS & RESOURCES MEETING

## **Ask the team:**

- What resources do you need to meet the expectations/deliverables of our team?
- If it is not obvious to you, ask why those resources are important.

## **Discuss with the team:**

- Limitations that may exist in acquiring these resources – budget, company policy, time, lack of materials, etc.
- Have the team come up with suggestions for remedy.

## **Commitment:**

- Tell the team how you can help them with the resources they need, then deliver for them.

# TOOLS & RESOURCES MEETING NOTES



DATE	COMMENTS

# ENGAGEMENT CATEGORY – MY JOB



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**Survey Item #3** – My skills and talents are a perfect fit for my job duties.

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**Management Tip** – Learn to leverage the strengths of your team members. Assign duties to your team members based on where they perform the best.

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**Context** – People whose talents are not aligned to their roles, find their work to be difficult and unrewarding. They struggle with day-to-day expectations and will not feel that their work is valued.

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# MANAGEMENT STEP 3



## How it sounds

1. Have I asked you to do anything you're not comfortable with?
  2. Tell me what job responsibilities you think you're best at completing.
  3. What would you like to do more of?
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**Pro Tip** – If your team member desires to do/achieve more, then provide them with proper guidance and coaching to reach those personal goals. This helps build bench strength for the company.

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**Ask Yourself** – How often do I check in with my team members about their individual talents and how they align to their jobs?

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# SKILLS & TALENTS MEETING

## **Ask the following questions during a team meeting:**

- As a team, do we have the right people assigned to the right tasks?
- Where are our gaps, if any?
- Are there any changes in assignments that might build better team performance?
- Ask team members if there are any tasks they would like to volunteer for?

*Note: People typically volunteer for tasks that align with their talents.*



# SKILLS & TALENTS MEETING NOTES

DATE	COMMENTS

# ENGAGEMENT CATEGORY – MY JOB

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**Survey Item #4** – I have the training I need to do my job.

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**Management Tip** – Remember that training that occurs on-line is informational only. Training in the classroom is “skills awareness.” Real development occurs on the job.

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**Context** – Managers tend to believe that if someone went through “training,” that they should be ready to produce. Nothing trains like real-world experience and you are the best mentor for that experience.

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# MANAGEMENT STEP 4



## How it sounds

1. After being on the job for a while, what would you like to learn more about?
  2. How can I help you add to your skills?
  3. Let me show you a few tricks of the trade.
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**Pro Tip** – Think about giving one training tip to your team members on a weekly basis. Consider teaching your team members about your job, the company, the industry, etc.

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**Ask Yourself** – When is the last time I had a training discussion with my team?  
Where can I get content to share with my team?

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# TRAINING YOUR TEAM MEETING

## **Meeting Content Ideas:**

- Discuss safety procedures
- Educate on company history
- Educate on your job
- Share customer feedback
- Discuss potential career path
- Best practices for work in your area

# TRAINING YOUR TEAM MEETING NOTES



DATE	COMMENTS

# ENGAGEMENT CATEGORY – MY JOB



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**Survey Item #5** – My job is rewarding to me.

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**Management Tip** – Managers need to help team members see how their jobs connect to the overall mission of the company.

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**Context** – A quote to remember—“People want to be valued members of a winning team on an inspiring mission.” Creating a “Why” for your team is important in tying the team to the mission of the company. It’s not just about how much productivity there is, but rather why the productivity is important.

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# MANAGEMENT STEP 5



## How it sounds

1. What happens if we don't do our jobs correctly?
2. Our goal is to \_\_\_\_\_ we do that by \_\_\_\_\_.  
MISSION PRODUCTION GOAL

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**Pro Tip** – Creating an environment where team members know why their job matters is important to building an engaged team.

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**Ask Yourself** – What can I do/communicate to help my team members know why their work is important?

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# MAKING WORK REWARDING MEETING

**Hold a 10-minute meeting with your team. Discuss the following:**

- How does our job help the community?
- What possible scenarios could happen if we don't do our job correctly
- Are our goals realistic?
- What is the outcome for our company if we achieve our goal(s)?
- What is the outcome for our customers if we achieve our goal(s)?
- What does that mean for this team?

# MAKING WORK REWARDING MEETING NOTES



DATE	COMMENTS

# ENGAGEMENT CATEGORY – MY MANAGER



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**Survey Item #6** – My manager provides recognition that is perfect for me.

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**Management Tip** – Team member recognition is very personal and should be delivered locally. The manager must know what type of recognition each team member desires for it to be meaningful. For example, private versus public recognition.

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**Context** – Recognition doesn't have to be a grand gesture. Most team members enjoy simple and consistent recognition for completing tasks. Research also indicates that managers should recognize team members at least once every 7 days.

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# MANAGEMENT STEP 6



## How it sounds

1. Thanks for your work today
2. Great effort today
3. Thanks for handling that

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**Pro Tip** – Look for opportunities to catch your team members doing something right. A culture of recognition serves to create a higher-performing team members

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**Ask Yourself** – How often do I recognize my team members? Do I know how my team members want to be recognized? Have I provided recognition to my team members within the last week?

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# RECOGNITION MEETING

## **Semi-Annually:**

- Meet with the team and discuss team level recognition for meeting performance goals
- Meet with team members individually. Discuss the following:
  - Other than money, how would you like me to let you know that you have done something well?
  - How often would you like to hear from me?

## **Daily:**

- Look for someone doing something right
- Express your gratitude for their efforts
- Be genuine in your appreciation

*Consider having team members complete the Recognition Worksheet in the Contracting for Performance Guide for more insight into their preferred types of recognition.*



# RECOGNITION MEETING NOTES



DATE	COMMENTS

# ENGAGEMENT CATEGORY – MY MANAGER



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**Survey Item #7** – My manager cares about me as a person.

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**Management Tip** – As a manager you're responsible for managing team performance and work productivity. What most managers don't realize is that managing the people component is the most difficult part. The work part is easy, the people part can be messy.

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**Context** – A recent poll shows that team members expect 4 things from their Manager—Trust, Hope, Compassion, and Stability. They want to trust what their manager tells them. They have hope that their career will lead to greater rewards. They expect compassion from their direct supervisor when dealing with life issues. Team members want stability in the workplace. These four things contribute to your team members' well-being.

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# MANAGEMENT STEP 7



## How it sounds

1. Next week will be your X work anniversary, congratulations.
2. The weather over the weekend was very nice, did you get a chance to enjoy it?
3. What team are you most interested in this coming season?

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**Pro Tip** – Look for opportunities to connect with your team members in meaningful way. You shouldn't get involved in detail in personal issues, but you could be a sounding board for the team member. You may have other company resources that you direct your team member to seek out.

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**Ask Yourself** – How often do I ask about my team member's family? Do I know what's important to my team members beyond work?

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# RELATIONSHIP BUILDER TEAM MEETING

**Great managers create an environment where team members feel supported and cared for. Create this type of environment by:**

- Encouraging collaboration
- Scheduling time for relationship building – lunches, breaks, etc.
- During team meetings, ask one person to talk about two things they are passionate about
- Check in with your team occasionally about their family, hobbies, etc.

*Research shows that managers have more of an impact on an employee's health and wellbeing than the employee's doctor.*

# RELATIONSHIP BUILDER TEAM MEETING NOTES



DATE	COMMENTS

# ENGAGEMENT CATEGORY – MY MANAGER

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**Survey Item #8** – I can share new ideas with my manager.

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**Management Tip** – It's important to hear what your team members have to say. Sometimes, the best ideas for improvement come from the team members doing the work.

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**Context** – Let's be clear about hearing new ideas. Managers should be receptive to ideas, but not necessarily implement those ideas unless they make good business sense. Team members need to be heard and their input respected. If implementation is not possible, explain to your team member(s), why!

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# MANAGEMENT STEP 8



## How it sounds

1. What thoughts do you have on increasing our team's productivity?
  2. What ideas do you have that would makes work easier for us?
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**Pro Tip** – Seek out new ideas from your team members. LISTEN – with empathy. Be honest if you know of barriers or policies that will make the ideas difficult to implement. Give them the relevant information, then send them back to the drawing board. Don't discourage their creativity!

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**Ask Yourself** – Am I open to listening to my team members? Do I encourage them to think outside the box?

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# NEW IDEAS TEAM MEETING

**Gather your team and discuss one of the following:**

## **Open ended meeting**

- What ideas do you have that would makes work easier for us?

## **Performance Specific Meeting**

- Team, we must hit the following performance goals \_\_\_\_\_.  
What ideas do you have to achieve these goals?

# NEW IDEAS TEAM MEETING NOTES



DATE	COMMENTS

# ENGAGEMENT CATEGORY – MY MANAGER



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**Survey Item #9** – My manager makes me feel that my work is valuable.

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**Management Tip** – Remember the earlier quote—People want to be valued members of a winning team on an inspiring mission. This item links closely to the importance of recognizing a team member's performance.

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**Context** – It's important to create a team where people feel like their contribution matters to the team. Without creating a place where people are valued, it's just a paycheck to them.

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# MANAGEMENT STEP 9



## How it sounds

1. Hey, when you do \_\_\_\_\_, it really makes a difference for the team and the company.
2. I'm sure that our client really appreciates your efforts as much as I do.
3. The work you're doing, really supports what we're trying to achieve.

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**Pro Tip** – Make your team a place where people are valued. Look for opportunities to positively reinforce your team members' contributions.

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**Ask Yourself** – How often do I communicate my appreciation to my team? How often do I connect their efforts to the overall mission of the Company?

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# TEAM MEMBER VALUE MEETING

**Everyone wants to know that their contributions matter to the overall mission of the team and the company. Hold a 15-minute meeting to:**

- Communicate the importance of each person's role and how their role connects to overall company goals.
- Ask team members what happens when someone does not perform in their role?
- Let team members know with some level of frequency that their job is important to what the team and company is trying to accomplish.

# TEAM MEMBER VALUE MEETING NOTES

DATE	COMMENTS

# ENGAGEMENT CATEGORY – MY TEAM

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**Survey Item #10** – My team members do quality work.

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**Management Tip** – High-performing teams typically hold other team members accountable for good work. People want to know that their team members are putting forth the same effort that they are.

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**Context** – In teams where team members feel that others are doing quality work, you will see better performance, less turnover, and a host of other business performance metrics on the rise.

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# MANAGEMENT STEP 10



## How it sounds

1. Let's decide what quality work looks like for this team.
  2. What are the things that we agree to always do?
  3. What are we going to hold each other accountable for?
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**Pro Tip** – Set team non-negotiables. Examples:

1. We **always** respond to each other within \_\_\_\_ hours.
  2. We **always** do \_\_\_\_\_ in regard to safety.
  3. Our team **always** does \_\_\_\_\_.
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**Ask Yourself** – Have I set non-negotiables for my team? How often do we remind each other of those non-negotiables?

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# TEAM MEMBER QUALITY WORK MEETING

## **Hold a team meeting. Discuss the following:**

- What does quality work mean to the members of this team?
- What happens when each of us delivers our very best?
- What happens when one of us delivers below standard?
- What do we expect from each other as team members?

# TEAM MEMBER QUALITY WORK MEETING NOTES



DATE	COMMENTS

# ENGAGEMENT CATEGORY – MY TEAM



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**Survey Item #11** – I care about my team members and their well-being.

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**Management Tip** – A strong team will look out for its members. As a manager of a Team, you will want to create an environment where team members care about the well-being of their teammates.

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**Context** – In teams where team members care about each other, you will see better performance, less turnover, and strong safety metrics.

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# MANAGEMENT STEP 11



## How it sounds

1. Bob, thanks for looking out for John today and picking up his slack. I know he wasn't feeling well.
  2. Manager asks – Stephanie, how are you doing? Not just from a work perspective, but overall...
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**Pro Tip** – Set up opportunities for team members to socialize outside of work.

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**Ask Yourself** – Do I get the team together often enough to build camaraderie? Do I have any examples that I can share with the team of someone looking out for a team member?

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# TEAM WELLBEING MEETING

## **During a team meeting/lunch/dinner, discuss the following:**

- Give examples of times when we as teammates might look out for each other.
- Some ideas might be:
  - Adherence to safety policies
  - Understanding/encouragement during personal issues
  - Encouragement to learn new skills
  - Celebration/acknowledgment of personal and professional milestones

# TEAM WELLBEING MEETING NOTES

DATE	COMMENTS



# ENGAGEMENT CATEGORY – MY TEAM



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**Survey Item #12** – I have at least one team member that I trust.

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**Management Tip** – As stated earlier, team members want to trust the people they work with. Create that environment by being trustworthy yourself.

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**Context** – When team members work with people they trust, we see better collaboration, better performance, and overall better business metrics.

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# MANAGEMENT STEP 12



## How it sounds

1. Diane always has my back. She jumped in and helped my finish my tasks.
  2. I can always count on Donnie to \_\_\_\_\_.
  3. Megan is incredibly reliable.
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**Pro Tip** – Look for opportunities to celebrate and repeat statements like these when you hear them. Help “market” the reputation of your team members.

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**Ask Yourself** – Have I heard any examples of trust amongst my team(s)?  
Have I communicated those examples throughout my sphere of influence within the company?

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# CREATING TRUST ON OUR TEAM MEETING

**Strong teams share openly, have a high degree of trust, and value the opinions of their teammates.**

## **During a meeting:**

- Discuss examples of trust among the team.
- Define the necessary elements that the team members need to build trust.

# CREATING TRUST ON OUR TEAM MEETING NOTES



DATE	COMMENTS

# ENGAGEMENT CATEGORY – MY TEAM



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**Survey Item #13** – My team members/manager recognize when I do quality work.

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**Management Tip** – Managers should facilitate teams to decide how they will recognize others for quality work.

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**Context** – While it's important for managers to recognize team members, it's also important for team members to recognize the work done by their teammates. It creates ownership by the team and also managing team member performance easier.

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# MANAGEMENT STEP 13



## How it sounds

1. Team Member – Kirk really did a great job on the last presentation. Make sure you tell him thanks for the extra work.
  2. Hey Julie, remember we said that we said we would always \_\_\_\_\_?
  3. I wanted to thank you for upholding our team values.
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**Pro Tip** – Make sure that the team has agreement on how they will hold each other accountable for quality work and how they will recognize someone for a job well done.

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**Ask Yourself** – Do I have any examples of teammates complimenting each other? Have I shared those examples?

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# RECOGNIZING QUALITY WORK MEETING

**Hold a brief meeting to describe what quality work means to you as the manager.  
Ask team members the following:**

- You have heard my description of quality work, please tell me your definition of quality work
- How can we hold each other accountable for delivering quality work?
- What is at risk if we do not deliver quality work?
- What expectations do you have of your teammates for delivering quality work?
- Are there other areas/departments of our company that make it difficult for you to deliver quality work?

*Record responses and revisit regularly.*

# RECOGNIZING QUALITY WORK MEETING NOTES



DATE	COMMENTS



# ENGAGEMENT CATEGORY – MY GROWTH



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**Survey Item #14** – I receive feedback on my performance at the right pace for me.

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**Management Tip** – Managers need to be in touch with a team member's need to receive feedback. The frequency is different one person to the next.

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**Context** – Many managers operate on the principle that “No News is Good News.” In other words, if the manager is talking to the team member, then everything is fine. The problem is that team members want to know where they stand.

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# MANAGEMENT STEP 14



## How it sounds

1. Dave, you mentioned that you would like to have monthly check-ins on your performance. Let's chat next Monday.
2. Mike, you mentioned that you would like to catch up twice per year to chat about your performance. We are a couple of months away from that chat. I wanted to check in and see if there's anything that you need from me in the meantime?

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**Pro Tip** – You'll need to meet with each individual team member to decide how often the team member wants to meet to discuss.

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**Ask Yourself** – Do I know how often my team members need to meet to discuss their performance?

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# GIVING FEEDBACK AT THE RIGHT PACE

Great managers connect with their employees and give performance feedback at a frequency that is perfect for the employee, not just as the company dictates (annual reviews).

Meet with your team members and discuss how often they would like to receive feedback from you relative to their performance. Employees that are trying to improve or are interested in moving up in the company may ask for frequent input from their manager. Others may be satisfied with a once per year conversation.

The important thing is that you find out what each of your direct reports needs when it comes to feedback.

# GIVING FEEDBACK AT THE RIGHT PACE NOTES



DATE	COMMENTS

# ENGAGEMENT CATEGORY – MY GROWTH



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**Survey Item #15** – I plan to stay with my company.

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**Survey Item #16** – I know what the career path is at my company.

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**Management Tip** – As a manager, make sure to help your team members know what opportunities are available to advance their career. Great managers pride themselves on promoting people to higher level positions.

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**Context** – Team members are more likely to say they plan to stay with the company if they understand their opportunities for the future. Creating a clear vision of how a team member can move up is an important key to keeping turn-over low.

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# MANAGEMENT STEPS 15 & 16



## How it sounds

1. Let's talk about the next stop on your journey with the company.

- Here are the milestones we need to help you attain to get to the next level

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**Pro Tip** – Make sure that you're consistently discussing your team member's progress towards the next level.

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**Ask Yourself** – How often do you meet with your team members to discuss the next steps in their career?

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Employees desire to know “what is next” for their careers. It is important to know that promotion is not the only career path. Some employees may want to simply gain more expertise in their current roles or transfer to another area of the company in a similar role.

**Meet with your team members individually to discuss the following:**

- What do you think would be the next step in your career?
  - Discuss how the team member is progressing on reaching that goal.
  - Help identify gaps—education, experience, skills, performance, etc.
  - Help devise a plan to get the team member to their goal.

# DESIGNING/COMMUNICATING A CAREER PATH NOTES

DATE	COMMENTS

