



# Engagement & Retention

## Digital Documents

Leader Tip Sheets

3 Recommendations by Team, by Leader, for Executives

GK Engagement Action Plan

GK PI Reference Profile Handout

GK LEAD Academy

GK Engagement & Retention Workshops (only available in April 2023)

# Team Engagement Discussions: Leader Tips

- Individuals have been assigned a working group based on a singular engagement report.
- Use the data in that report for purposes of this activity.
- Share the goals of the activity:
  - Examine the engagement caution areas.
  - Capture 3 recommendations for the team, the leader and the executive team
  - Begin working on the team's first idea by completing a **Commitment Action Plan**
- Leader: Be the notetaker or appoint one: Capturing ideas will be critical for converting the conversation into action plans during and after the activity. The team should be doing at least 75% of the talking. This is the leaders time to listen. Leaders...
  - Ask probing questions to delve into the root cause.
  - Manage time to make sure that most – if not all – of the 5 caution areas are discussed.
  - Remind the team that the numbers in the report indicate the percentage of individuals that agree or strongly agreed with the statement.
  - Resist the temptation to dominate and lead the conversation.
- For the Caution Areas (blind spots), it can be helpful to break up the survey question into separate parts. As an example, if the item included something about “politics” and “rewards” choose one to talk about first.
- If there is a sensitive issue (like internal politics), it is helpful to depersonalize by asking employees to share examples of similar negative situations with past managers and organizations. This gives an opportunity to react to those experiences. Is this what is happening on our team? How is our situation different?
- **Share next steps with the team:**
  - Complete the 3 recommendations for team, leader and executives.
  - Work on the first item we agree to. Check progress regularly.
  - After we feel we have accomplished item 1, begin 2<sup>nd</sup> item to work on, etc.

## Managing Roadblocks

Situation	Goal	Sample Response
Team member makes a comment explaining away the results on an item.	Guide them back to action; foster an environment of change, not just acceptance of the way things currently are.	<i>That may be true. I can understand how that might be frustrating. That's why we are going through this activity. What would you do to change it? No item or idea is too crazy – we're here to think through this together.</i>
Team members are quiet; nobody offering feedback.	Conversation starters; icebreakers.	<i>Tell me about a time when (communication, teamwork, etc.) worked well for you. (pause and listen) What about that made a positive experience?</i>
Team members agreeing with everything without question.	Probe into the discussion to uncover additional ideas or details.	<i>It's great that you feel that we are on the right track with these. If you were in my shoes, how would you implement these changes? What would you add or change from what we have here?</i>
Team members not putting forth any ideas of	Stop the “it's not my job” mentality and have	<i>You are the ones doing the job day in and day out, so you have the best perspectives here. Help me</i>

how to make things better; saying “it’s not my job” to come up with changes.	employees start to become advocates for their own engagement.	<i>help you. If you could change one thing about X, what would it be? No idea is too big or too small – let’s explore them all.</i>
Skepticism of change	Show commitment of change.	<i>Rarely do we get time to talk about these important issues. We are so busy day in and day out. However, engagement is a big part of the employee experience at GK. This isn’t meant to be a one-time activity to be forgotten but a plan that we will all commit to and work on.</i>
Team members looking for the leader to provide insight	We want to hear from you first.	<i>We are taking a different approach. We want to hear from you first and what’s important to you. This will help me (and us) and GK formulate plans together.</i>
Group goes off track and begins to discuss off-topic items.	Bring group back to the purpose of the activity.	<i>I’d like to get us back on track. We will come back to that item during an upcoming meeting. Let’s be sure we maximize our time here on engagement.</i>
Team member deflects and blames others	Redirect focus back on our actions	<i>It is frustrating when that happens. What would be productive for us today is to examine our role in the situation and what can we do to help improve it.</i>
Caught up in the numbers / data or another data point that isn’t a caution area	Redirect to actionable items.	<i>The numbers present just one data point. Let’s move away from that and think about specific items we can do based on the caution areas.</i>  <i>If there are other areas you’d like to explore, we can discuss those after we address the caution areas.</i>
Resistance because not all team members are present	Action planning starts today.	<i>I agree. All team members need to be included. For purposes of today, it starts with us. It doesn’t end with us. We will continue these discussions, bring others up to speed and get their input.</i>
Unsure what to do because of an organizational or leader change. Direct leader is not present for the activity.	Focus on what the group can do.	<i>That change will impact the team. For purposes of today, let’s focus on what we can do as a team and three recommendations that we have for the executive team.</i>  <i>If your direct leader isn’t here today (Converge), who will review our recommendations with them?</i>

Once the three recommendations are done for leader, group and executives, please turn them into Jeff Hull at Converge (Converge attendees) or email to

[Jeff@TheTalentAuthority.com](mailto:Jeff@TheTalentAuthority.com)

Additionally, leaders will need to share what they along with their teams will be working on.

Note: Jeff will compile all executive recommendations and present them as written. Additionally, Jeff will analyze recommendations to identify any trends.

**Engagement Action Plan For Report Name:** \_\_\_\_\_

**What are three things you and your team members will commit to do?**

(1)

(2)

(3)

**What are three engagement recommendations your team has for the executive team?**

(1)

(2)

(3)

**What are three things that leaders (with direct reports) will commit to do?**

(1)

(2)

(3)

# Commitment Action Plan

1

**Turn a potential engagement challenge into a goal.**

Potential Challenge:

Goal:

What does success look like?

3

**Identify 3 strategies you will use.**

by when?

1

2

3

5

**List 5 tactics that will help with success.**

by when?

1

2

3

4

5

People Focused

# Action Plan Checklist



## Awareness

Day 1-Week 2

- Send the engagement report to your team
- Schedule Team Awareness meeting
- Conduct Team Awareness meeting



## Insights and Action

Week 3

- Schedule Team Insights and Action meeting
- Conduct Team Insights and Action meeting
- Create 1st Team 1/3/5 Action Plan



## Crawl

Week 4-7

- Begin executing 1st Team 1/3/5 action plan
- Meet with team to discuss progress on 1st Team 1/3/5 action plan
- Create 2nd Team 1/3/5 action plan

## Walk

Week 8-11

- Start executing 2nd Team 1/3/5 action plan
- Meet with team discuss progress on action plans 1 and 2
- Create 3rd Team 1/3/5 action plan

## Run

Week 12-15

- Continue executing the 1st and 2nd team action plans
- Start executing 3rd team action plan
- Meet with team to discuss progress and success with all 3 action plans



**Reference Profiles** are a quick and easy way to communicate the characteristics of a group of people who have similar and different drives. This page highlights contrasting profiles.



Altruist



- Needs structure and adheres to the rules
- Cooperative, collaborative, congenial
- Asks, "What can I do to help you?"
- Dislikes risks
- Positive responses to pressure
- Empathetic, extraverted, enthusiastic
- Fast, intense, efficient, precise detail and follow-up



Analyzer



- Tense, moves quickly
- Demanding of self and others
- Exacting in setting performance standards
- Intensely analytical, thorough, disciplined
- Reserved in communication
- Skeptical and calculating
- Risk-averse, wants all answers before taking action



Artisan



- Produces highly precise, accurate work
- Needs strong structure
- Adhere to rules
- Respects and seeks direction
- Needs a plan to follow
- Sensitive to criticism
- Straightforward, factual, calls it as it is
- Analytical thinking



Captain



- Problem-solver, likes change and innovation
- Risk-taker, confident, self-starter
- Results-oriented, fast, intense and impatient
- Drive to control big picture
- Wants others buy in
- Authoritative, telling, diplomatic
- Best with systems, effective with people



Maverick



- Innovative, "outside the box" thinker
- Venturesome, risk-taker
- Animated, direct, telling
- Quick to act, driving
- Needs freedom from rules and control
- Freely delegates with loose follow-up



Scholar



- Thorough, accurate, careful, precise
- Reserved, introspective, imaginative, analytical
- High level of technical expertise
- Needs structure, adheres to rules
- Patient, consistent, methodical, tight delegation, strong follow-up
- Authoritative, telling



Individualist



- Highly independent generalist
- Resists structure and authority
- Big picture, little interest in details
- Venturesome, risk-taker
- Goal and results oriented
- Authoritative, does things his/her own way



Collaborator



- Warm, friendly, lively, extraverted
- Easygoing
- Willing team player; helpful, understanding, listener
- Patient, steady, does not like pressure
- Most effective with the familiar
- Uncritical, accommodating, accepting; dislikes risk
- Average detail in follow through



Persuader



- Warmth, charm, social poise and social
- Persuasive selling style
- Team-builder and developer
- Generalist, needs freedom from structure
- Venturesome, risk taker, rallies other people around their goals
- Self-confident, strong ego, initiative



Operator



- Steady, patient, relaxed, warm and approachable
- Best with unchanging environment
- Has tolerance for and learns by repetition
- Respects / seeks direction, needs a plan
- Eager to do what is expected, better than average detail work
- Patient listener



Guardian



- Skillful detail work, precise
- Wants to do the right thing
- Needs strong structure, adheres to rules
- Respects and seeks direction, needs a plan
- Works harmoniously with the group
- Shy with strangers, opens-up in familiar circumstances
- Patient, steady, higher tolerance for repetitive work



Promoter



- Extravert, warm, friendly, casual, uninhibited
- Persuasive selling, empathetic, communicates verbally
- Sells intangibles, little emphasis on facts or details
- Effective with groups
- Delegates details, little follow-up
- Won't take no for an answer



Controller



- Specialist, needs strong structure
- Adheres to rules
- High-quality detail work
- Very tight in delegation
- Loyal, conscientious, cautious, conservative
- Does things fast and right
- Expert in technical specialty
- Best with systems, concepts, things



Strategist



- Results oriented
- Innovative, drive for change, calculated risk-taker
- Self-starter, self-motivator, initiative
- Analytical, critical, creative thinking
- Controlling, tough on people
- High standards, high-quality work, expert



Specialist



- Needs strong structure, adheres to the rules
- High-precision, high-quality detail work
- Respects authority
- Reserved, analytical, introspective
- Serious, skeptical
- Sincere, factual, cautious communicator



Venturer

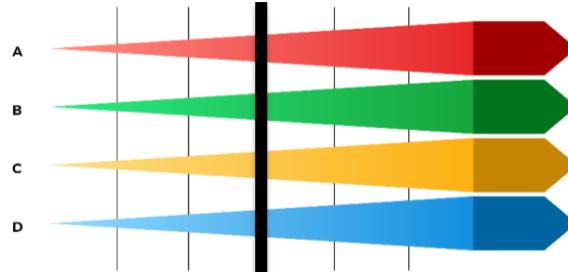


- Self-starter, self-motivator, takes initiative
- Results and goal oriented, fast, intense
- Independent generalist, free from structure
- Venturesome, risk-taker, authoritative, new ideas, technologies, innovation



Adapter

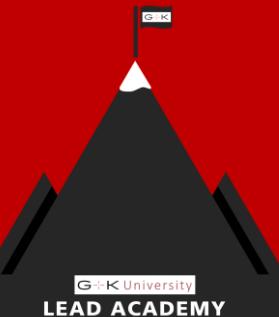
- Bridge-builder
- Empathetic
- Versatile, Flexible
- Adapts to situations easily



- A = Dominance.** Drive to exert one's influence  
**B = Extraversion.** Drive for social interaction with others  
**C = Patience.** Drive for consistency and stability  
**D = Formality.** Drive to conform to rules and structure

### Coach Yourself to Build Better Relationships

	Below Midpoint	Above Midpoint
<b>A</b>	<ul style="list-style-type: none"> <li>__ Stand your ground when you know you're correct</li> <li>__ Come to situations and meetings prepared to contribute</li> <li>__ Recognize that disagreement and "conflict" is natural</li> <li>__ Allow debate to play out</li> <li>__ Proactively State: This is what I think about a situation</li> </ul>	<ul style="list-style-type: none"> <li>__ Actively seek input from others</li> <li>__ Listen. Allow others to share opinions or ideas</li> <li>__ Think about how your message will be received</li> <li>__ Get comfortable being wrong now and then</li> <li>__ Ask: <i>I'd like to hear what ideas you have?</i></li> </ul>
<b>B</b>	<ul style="list-style-type: none"> <li>__ Initiate conversations, schedule time to speak to others</li> <li>__ Create processes that encourage direct communication</li> <li>__ Do not be overly reliant on electronic communication</li> <li>__ Speak up when something is unclear</li> <li>__ Ask: <i>Let me think on it; when do you need an answer?</i></li> </ul>	<ul style="list-style-type: none"> <li>__ Allow others an opportunity to contribute</li> <li>__ Be succinct when communicating</li> <li>__ Ask about problems or risks</li> <li>__ Ensure everyone has a chance to speak</li> <li>__ Clarify: <i>What am I responsible for / when?</i></li> </ul>
<b>C</b>	<ul style="list-style-type: none"> <li>__ "Does everything need to be done right now?"</li> <li>__ Recognize others have a different pace than you</li> <li>__ Honor priorities and see initiatives to completion</li> <li>__ Ask: <i>What is our biggest priority now?</i></li> </ul>	<ul style="list-style-type: none"> <li>__ Clarify timelines and focus on "when"</li> <li>__ Start early and leave time for the unexpected</li> <li>__ Keep others informed when progress is made</li> <li>__ Ask: <i>When do you need it completed?</i></li> </ul>
<b>D</b>	<ul style="list-style-type: none"> <li>__ Seek data to support decisions</li> <li>__ Evaluate decisions from multiple perspectives</li> <li>__ Respect others' questions and need for information</li> <li>__ Ask: <i>What data or details might I be missing on this?</i></li> </ul>	<ul style="list-style-type: none"> <li>__ Learn how to move forward with "enough" info</li> <li>__ Ask yourself: <i>Is it worth this much time?</i></li> <li>__ Respect flexibility shown by others</li> <li>__ Ask: <i>What details would be helpful to you?</i></li> </ul>



# GK LEAD ACADEMY

## GK LEAD ACADEMY



Goldrich Kest is pleased to offer highly-interactive leadership development to all people leaders. Group size is limited, so please register early. As a participant, you will:

- Gain greater self-awareness so that you, as a leader, have a roadmap for success.
- Adapt your natural leadership tendencies to better lead, motivate, direct, and develop direct reports.
- Lead yourself and your team to build trust, handle conflict, create commitment, enhance accountable to achieve results.
- Communicate more effectively and provide feedback for greater impact and action in others.
- Coach to proactively boost the productivity of performers and build competence in those that may be falling short.
- Manage performance of team members through everyday actions that promote accountability and results.

Five topics delivered once per month (8:30 AM to 12:00 PM Pacific).

## 2023 Enrollment Details

**Use the QR Code to register.**



Once enrollment is confirmed, you will receive an Outlook invite from [Training@TheTalentAuthority.com](mailto:Training@TheTalentAuthority.com).

All five modules must be attended to complete the program and earn your certificate.

Facilitation is via **Zoom**. You will need to be in a private space with **(1) your own computer, (2) webcam on and (3) connected audio** (phone or computer). Electronic materials will be provided prior to the session, which you may print or use electronically. Printing is preferred.

If you are unable to attend a session in your assigned cohort, you may make-up a session with another cohort. Please send request to [Training@TheTalentAuthority.com](mailto:Training@TheTalentAuthority.com).

## 2023 Virtual Cohort Dates | 8:30a-12:00p (Pacific)

	Competencies Developed	Cohort 3 4 <sup>th</sup> Thursday	Cohort 4 4 <sup>th</sup> Wednesday	Cohort 5 2 <sup>nd</sup> Wednesday
<b>1</b>	Leading	May 25	Jul 26	Sep 13
<b>2</b>	The 5 Behaviors	Jun 22	Aug 23	Oct 11
<b>3</b>	Communications	Jul 27	Sep 27	Nov 8
<b>4</b>	Coaching	Aug 24	Oct 25	Dec 13
<b>5</b>	Performance Mngmt	Sep 28	Nov 22	Jan 10, 2024

*Based on interest, more programs may be added in 2024.*



# GK LEAD ACADEMY

Five Courses. One Per Month.



## Month

### **1** Leading | Behaviors.

Leaders should inspire, motivate and empower those around them. This can be very challenging for virtual teams or leaders that are leading remotely. The best leaders must have a "Leadership Mindset" and possess self-awareness and skills to manage and perpetuate an environment where people are encouraged to take initiative and assume greater responsibilities. This course helps leaders get aligned with the values of great leaders and to get started with the behaviors that reflect those values. In this session leaders also get exposure to the Predictive Index (PI) behavioral assessment results and how it can be utilized to better lead individuals.

### **2** The Five Behaviors.

Lead more effective teams through understanding the foundational principles for building a cohesive team based on The Five Behaviors model: Trust, Conflict, Commitment, Accountability and Results. Overcome barriers caused by natural tendencies that make effective teamwork so elusive by creating greater self-awareness of the impact of the behaviors and then having the discipline to overcome them. Identify the critical behaviors and interpersonal skills needed to become a more effective team by understanding how individual styles contribute to a team's overall success. Prior to this session individuals will take The Five Behaviors assessment and will utilize their results as materials for this session.

### **3** Communications.

Do more and be more. Leaders hear this within their organization; however, are not given tools to make this happen. The foundational tool is a set of strong interpersonal skills giving leaders the ability to inspire action in others. Leaders who possess these tools, can better accomplish goals by mobilizing and engaging organizational talent. In this course, leaders learn the best practices in how to establish rapport, build trust, include others, foster accountability, and motivate talent. They also learn the fundamentals of providing feedback and documenting conversations to ensure tasks are successfully completed.

### **4** Coaching.

Organizations can no longer settle for just decent coaching from their leaders. In today's fast-paced workplace, leaders must possess the ability to quickly assess business priorities, the capabilities of internal talent, and expertly navigate the coaching necessary to build successful teams. Leaders must inherently know when to optimize each coaching opportunity because the excuse of not having time is no longer acceptable. Leaders must recognize both high and under-performing individual contributors; and have the skills to coach for improvement. Here, leaders learn four critical coaching techniques that will assist them in challenging situations and conversations. Guidance is provided to leaders on how to ask those effective and insightful questions, how to increase employee engagement, and how to acknowledge and/or demonstrate appreciation.

### **5** Performance Management.

Lack of ownership and accountability is a common complaint within most organizations. And unfortunately, most individuals fall short in this area. When people are truly engaged, they strive for better results and are more willing to take ownership of their work, of processes and outcomes, and modify their behavior accordingly. Leaders are shown the positive impact of shifting ownership from themselves to their team members. This shift in mindset not only builds individual ownership, it also allows the individual to grow in their role and for the leader to focus on other priorities - coaching and developing team members throughout the performance cycle. Leaders receive hands on skill applications on how to effectively use SMART goals to help them establish metrics, monitor progress, and fairly evaluate performance results.



# Engagement & Retention

## For GK People Leaders

Limited Leadership Development Course Offering

Dear GK People Leaders

Based GK's engagement survey results and in addition to the planned engagement action planning sessions you will be going through during and after Converge, GK is offering an additional workshop to better help people leaders better understand their role with engagement and retention.

The sessions will be conducted by Talent Authority, which administered the engagement survey. The highly-interactive virtual workshops will provide you with valuable insights on how to understand what your team members value most in the workplace and how to provide that value, reduce losing top talent, ensure team members feel rewarded, appreciated and utilized, and recognize early signs of disengaged employees and proactively address them.

We believe that these workshops will help us create a more engaged and productive workforce, but also contribute to building a better workplace culture where everyone feels valued and supported. Therefore, we encourage all people leaders to sign up and participate.

Four sessions are available. Class size is limited. Sign up for just one. Sessions will be virtual and conducted on Zoom. You will need to have your own computer, a private space so that you can participate, camera on, and sound on. Electronic materials will be provided.

- April 6: 8:30 - 12:00
- April 11: 8:30 - 12:00
- April 11: 12:30 - 4:00
- April 27: 8:30 - 12:00

We hope you take advantage of this special leadership development class.

**Register at**

**[TheTalentAuthority.com/GK](http://TheTalentAuthority.com/GK)**