

JABIAN CONSULTING

The Ultimate Field Guide to Engagement



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People are at the center of what we do every day. Our employees and colleagues make or break our organizational goals. For example, when we change something (strategy, process, technology) the human factor is often the most complex and frustrating element of the solution. Leaders at all levels of an organization often struggle to figure out what's going on with our teams, or ourselves, and what we can do to make things better.

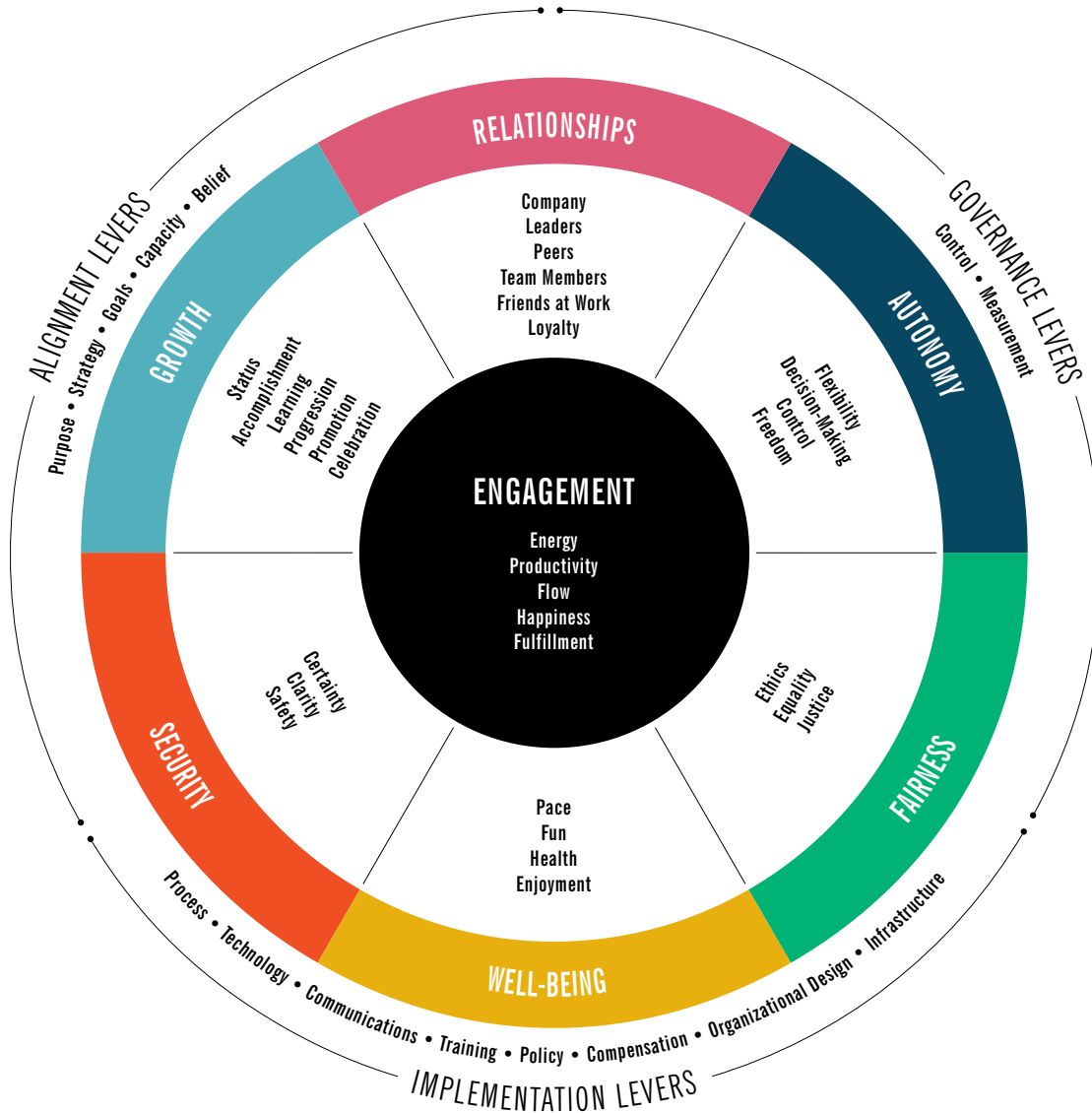
Over the past several years, we have developed a framework useful in diagnosing problems and designing solutions that involve people to make businesses better. We call it the *Jabian Engagement Framework*. Read on for ways to engage with the people at the heart of your business.

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Engagement Framework Overview

How to be a better leader, or a happier person, or both.

People lie at the heart of most of the problems we face. When we change something, the human factor is often the most complex and frustrating element of the solution. Leaders at all levels of an organization, and even each of us personally, often struggle to figure out what's wrong with our teams, or ourselves, or what we can do to make things better.

At the center of the Engagement Framework lies “Engagement” (shown in Figure 1). While the term is somewhat worn and ragged, it's clear that at the core, an engaged human being is happy, productive, energized, and fulfilled. The concept of engagement applies to groups of people, too, including teams and organizations, and can even apply to an entire society. Engaged people and engaged organizations are happier and more productive. Companies full of engaged people are more profitable. Countless books have been written and presentations given on the need to increase engagement within our workforces and personal lives. But how? What matters? What truly drives engagement?

ENGAGEMENT DRIVERS

The wedges around the center of our model are the six categories of engagement drivers: growth, relationships, autonomy, fairness, well-being, and security. Each of these drivers can be positive or negative for people at any time. Any change a person experiences can enhance or diminish engagement.

Indeed, each individual values each of these drivers differently, and at different times one driver may factor higher or lower than the others. Our research has shown, however, that collectively, there is a balance across each of these drivers in a large group of people. They all matter, and they matter in relatively equal proportions across a large group of people.

- **GROWTH**

Accomplishing a goal, receiving a compliment, learning something new, achieving a personal best, winning a contest, outperforming your peers, and receiving a promotion are all examples of growth. Striving for that next achievement, that pursuit, or chase, is at the core of the growth driver.

- **RELATIONSHIPS**

Social relationships are a key source of engagement. Human beings are social creatures, and we need to be connected to others. Deep relationships, where we care about others and others care about us, are an important element of engagement. Happiness research shows that we need at least one or two intimate (not necessarily romantic)

relationships in our lives to be truly happy, and the more relationships and connectedness we have, the happier we are. It's meaningful relationships that are important here, not the number of social media “friends” we have. Doing things for others is highly engaging. If you

● We resent being micromanaged or having to perform tedious work that keeps us from doing things we really love to do.

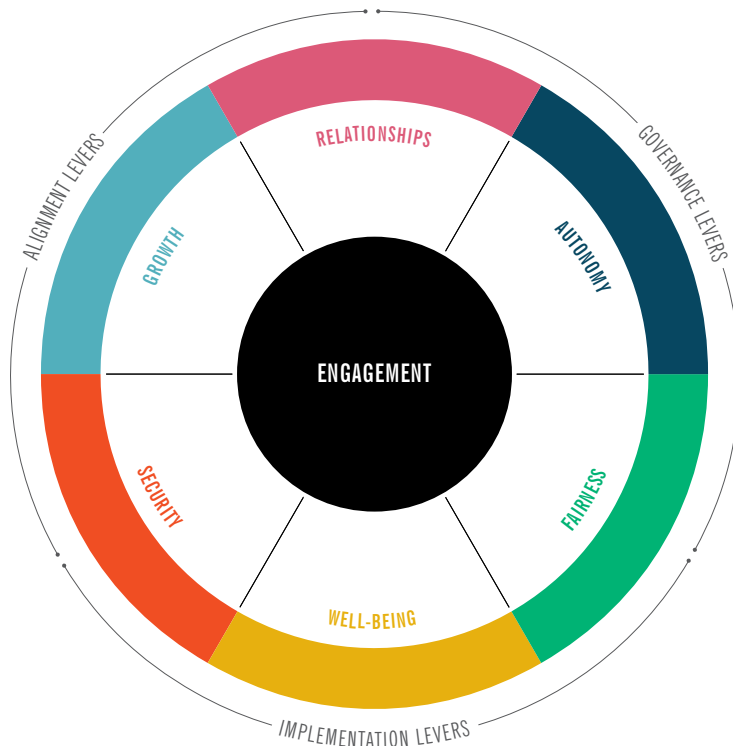
can accomplish a stretch goal that someone else appreciates, think of how powerful that act can be: creating growth and relationships at once—a double dose of engagement!

- **AUTONOMY**

Choosing the work we do, the people we do it with, and how and when we do it is engaging. Conversely, we resent being micromanaged or having to perform tedious work that keeps us from doing things we really love to do, or being tied to arbitrary and unnecessary schedules that prevent us from having the flexibility to balance hectic work and family commitments. Autonomy is usually one of those drivers that we don't notice until it's diminished. Recognizing the triggers of decreasing autonomy in yourself, and understanding the amount of

ENGAGEMENT FRAMEWORK

Figure 1



autonomy your employees desire, is crucial to maintaining positive engagement levels.

- **FAIRNESS**

Fairness is very important. Those who feel they, or someone they work with, are being treated unfairly will inevitably be distracted by that unfairness, and may even be motivated to actively protest and push back. Perceived unfairness will create friction and spreads throughout organizations, becoming a drag on engagement until the perceived unfairness is eliminated. Fairness has an upper limit, however, unlike the other engagement drivers. Once something is perceived to be fair, you can't make it more fair.

- **WELL-BEING**

This driver encompasses health, both in mind and body, and incorporates rest and fun. We can't be engaged if we're tired, unhealthy, in pain, or running at such a fast

pace that we can't catch our breath. Laughter and fun also fall into this bucket. Having a healthy dose of humor and levity in our interactions throughout the day reduces stress and improves our overall sense of well-being.

- **SECURITY**

Comfort in knowing that what happens next will not harm us drives engagement. Different levels of security exist, of course. At the most basic level, we have to feel we will not be physically harmed, and that we will have shelter and food. Once those basic security needs are covered, this driver is most influenced by knowing our position is secure, how the latest initiative will affect us, and that we have a good idea of what everyone important to us is thinking, including coworkers and bosses. Transparency helps to create security; it makes our world more predictable.

ENGAGEMENT DRIVERS

GROWTH

- Status
- Accomplishment
- Learning
- Progression
- Promotion
- Celebrating Success

RELATIONSHIPS

- Company
- Leaders
- Peers
- Team Members
- Friends at Work
- Loyalty

AUTONOMY

- Flexibility
- Decision-making
- Control
- Freedom

FAIRNESS

- Ethics
- Equality

WELL-BEING

- Pace
- Fun
- Health
- Enjoyment

SECURITY

- Certainty
- Clarity
- Safety

INFLUENCERS OF ENGAGEMENT

ALIGNMENT LEVERS

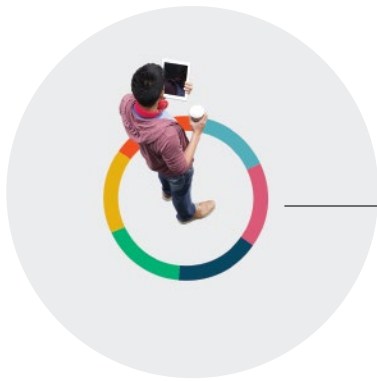
- Purpose
- Strategy
- Goals
- Capacity
- Belief

IMPLEMENTATION LEVERS

- Process
- Technology
- Communications
- Training
- Policy
- Compensation
- Organization Design
- Infrastructure

GOVERNANCE LEVERS

- Control
- Measurement



PERCEIVED UNFAIRNESS
WILL CREATE FRICTION THAT
SPREADS THROUGHOUT
ORGANIZATIONS.

INFLUENCERS OF ENGAGEMENT

So, if growth, relationships, autonomy, fairness, well-being, and security are the six drivers of engagement, how can you influence them? We have identified three categories of levers you can use to influence the six engagement drivers. Those appear in the outside ring of the Engagement Framework. The three categories of levers we've identified are Alignment Levers, Implementation Levers, and Governance Levers.

ALIGNMENT LEVERS

Alignment of purpose, goals, strategy, capacity, and belief is the first key to maximizing engagement. Deliberately addressing these key elements prior to starting any endeavor will help maximize successful outcomes. The reason we call them "alignment" levers is that the key to maximizing engagement is to align each of these at the individual, team, and organizational levels. The goal is to eliminate any dissonance between what matters most to the individuals working in an organization and the organization itself.

Aligning these elements maximizes intrinsic motivation and creates coherence across the organization.

PURPOSE

Purpose is the "why" behind what you do. Why does your organization exist? What is your personal passion and purpose? Why do you do what you do? Aligning the purpose of each individual and each level of the organization creates a shared purpose that amplifies the efforts of each individual. Shared purpose builds closer relationships among people and creates clarity about how people will behave within the organization, which improves the relationships and security.

STRATEGY

Strategy builds on purpose. It lays out the higher-level, long-term mission and vision. It sets the long-term target for what individuals seek and what an organization strives for. It increases security because we know there is a plan for the future. Strategies that align with purpose are inspiring. They motivate people to accomplish great things and grow, personally and organizationally, in pursuit of that strategy.

GOALS

Goals define what you are working toward in the shorter term. Goals get accomplished; accomplishments influence growth. Goals also clarify priorities, which increase security. It's important to involve people

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in setting goals, which improves autonomy. Make sure goals are achievable and realistic, lest they be interpreted as unfair or decrease the growth driver. Shared goals among team members will also improve relationships as teams gel and individuals help each other achieve the goal together.

CAPACITY

Without the right level of bandwidth or capacity to fulfill a purpose,



execute a strategy, or meet a goal, burnout and failure are inevitable. Aligning the capacity of individuals and teams within an organization will contribute to the well-being driver.

BELIEF

People must believe success is possible. Belief is the opposite of cynicism. Aligning the belief that the organization can be successful is a prerequisite to attempting anything, and aligning the belief that the organization must be successful at the individual and team levels can supercharge the energy of an organization. Conversely, insidious cynicism can kill any initiative or culture.

IMPLEMENTATION LEVERS

The implementation levers at the bottom of the framework are the tools available to support the people who do the work in an organization. Process, technology, communications, training, policy, compensation, organization design, and infrastructure are all levers that influence the engagement drivers. They are the tools we usually turn to first to get things done.

PROCESS

Processes define the step-by-step “how” behind our work. Processes create clarity and improve our certainty about completing a task, which improves security. Processes also help us accomplish tasks, which is a key to the growth driver.

TECHNOLOGY

Technology is about the tools we use to get our work done. Technology amplifies our capabilities. Tools can improve autonomy by eliminating tedious, repetitive, and boring tasks, freeing time to do things that are more interesting, and allowing us to work where and when we want. They can also save us physical effort, which improves our stamina, influencing the well-being engagement driver.

COMMUNICATIONS

Communications transmit knowledge. Without communications, we’re operating in the dark, which creates fear and uncertainty that drags down security. Instead, communications create awareness and understanding, providing us with a sense of security. Communications also help us build relationships. The

more open, deep, and transparent the communication, the better the connection between individuals and groups, and the stronger the relationships within the organization.

TRAINING

Training builds skills. Skills are critical for growth and the accomplishment of tasks. Without the right skills, security takes a hit as we begin to worry about our ability to satisfy our own expectations and those of our organization. Training can also influence the fairness driver. Putting someone into a role where he or she inherently lacks the skills to be successful is unfair. The resulting stress can also affect well-being.

POLICY

Policies are the rules we live by, both personally and within an organization. Policies generate security. They clarify expectations and boundaries for acceptable behavior. Policies can improve fairness and autonomy (think “work-from-home” policy). Policies can also restrict autonomy by imposing rules that restrict decision-making and control. The right policies and rules



create a balance among security, fairness, and autonomy, which then drives engagement.

COMPENSATION

Compensation is a special form of policy worthy of its own place on the Engagement Framework. It's important to note that compensation itself is not a driver of engagement. It's not in the center of the framework. Compensation, rather, influences each of the engagement drivers. Getting a raise affects the growth driver. It is an accomplishment and maybe even a new personal best. You can spend compensation on others, by doing nice things for people you love, or paying for education

for your children, improving your relationships. You can save for the future, improving your security. You can pay off debt, which increases your autonomy and freedom to do other things with your money. A change to your pay might repair an inequity if you felt unfairly compensated previously. Compensation can also be used to fund well-being activities such as vacations, health club memberships, massages, or even a fun night out on the town. It's not compensation that drives engagement—it's what you do with it that matters.

ORGANIZATION DESIGN

Organization design is another special form of policy worth calling

out on its own. Organization design simply tells you where you fit into a hierarchy, who you report to, and who you are expected to interact with. An organization design clarifies roles and co-workers, improving security and encouraging relationships.

INFRASTRUCTURE

The physical space in which we work can significantly affect relationships, well-being, autonomy, and growth. An open workspace will encourage more interaction with others, improving relationships, and perhaps leading to collaboration that drives growth. Bright and open environments can also improve our sense of well-being and happiness. Being stuck in a basement office with no windows can have the opposite effect. An open workspace can also restrict autonomy by exposing our activities for everyone to see; meanwhile, a closed-office environment can create privacy and sometimes offer the focus required to complete a complex task in a distraction-free space, which impacts the growth driver.

GOVERNANCE LEVERS

The last two levers we include in the Engagement Framework are the governance levers of control and measurement. They allow us to confirm everything is working

as planned, that goals are being accomplished, that purpose is being met, and that we're all holding each other (and ourselves) accountable for work that needs to get done.

CONTROL

The control lever is a special kind of process that provides oversight to a project or initiative to make sure it's going as planned. By checking in periodically, we improve security and ensure we're making progress on our goals and influencing growth. At the individual level, we should step back regularly to make sure we are on track toward meeting our goals and accomplishing our tasks. Teams and organizations should conduct periodic status checks and readouts to review progress.

MEASUREMENT

Measurement allows us to objectively assess whether we're being successful. It's easy for people to subjectively feel like they're making progress, even though measurable improvement hasn't happened. Did it really improve then? Maybe, but it's more likely we're just not facing the facts: Things are not getting better. Measurement allows us to gauge progress fairly, serving as a clear indicator of growth.

BUT WHAT ABOUT LEADERSHIP?

So, where is leadership in the Engagement Framework? Isn't good leadership the key to engagement? Of course it is. Leadership is, quite simply, the effective application of each of the levers on the outside of

● Organization design simply tells you where you fit into a hierarchy, who you report to, and who you are expected to interact with.

the Engagement Framework to maximize engagement within the organization.

The Engagement Framework is a tool to diagnose why your organization is struggling, how to manage a major transformation, how to improve the effectiveness of your team, how to move from good to great, or how to make yourself happier and more engaged. It applies at the individual, team, and organizational levels, and it applies when analyzing a steady-state organization or an organization going through a major change.

Step back to figure out what is improving or diminishing the Engagement Drivers in your situation. Then look around the outside of the circle and ask yourself which levers you can pull to influence the Engagement Drivers. Pull the right levers at the right times, and you'll drive better engagement. Drive better engagement for yourself, and you'll be happier. Drive better engagement for your team or organization, and you'll be a better leader. 🌈



Growth



We feel good when we're growing. Growth drives engagement. Growth comes from many angles. It can come from relatively small things, like learning something new, ticking something off our to-do list, or getting a "like" on our Facebook post. It can come from more significant life achievements, like graduating from college, getting a promotion, or finally achieving the six-figure salary you always dreamed of.

Neuroscience has shown us that the good feeling we get from growth—like all the engagement drivers—is associated with our brain chemistry. Dopamine is one of the key neurotransmitters associated with achievement and accomplishment. Every time we get that "like" on our social media post, we're getting a little shot of dopamine, which, in turn, makes us happier and more engaged.

We chose to start this series with the growth driver because the upside of personal growth is unlimited. The only limiting factor on growth is ourselves. Growth can happen until the day we die. We've all seen the difference between the senior citizen who is still learning and teaching and trying new things and the senior citizen who has "checked out," refusing to try new things, eschewing anything that would require work and growth. Which one, in your experience, is happier?

Take former President Jimmy Carter as an example of someone who has continued to grow, even though he has many accomplishments under his belt. As a survivor of pancreatic cancer,



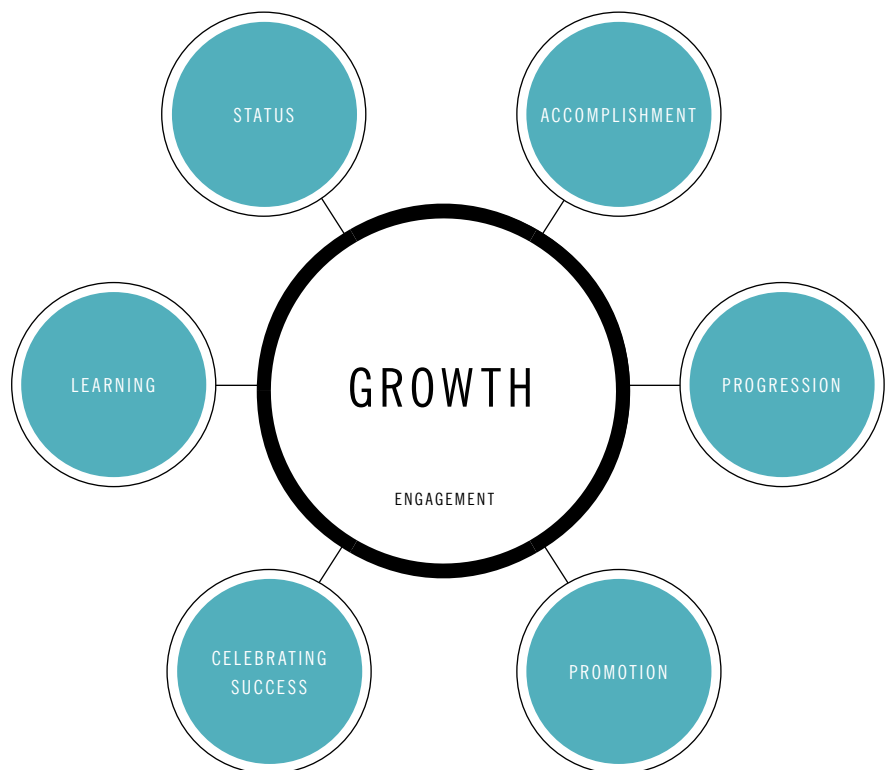
President Carter is still going strong and still growing. After serving as president of the United States, he went on to establish Habitat for Humanity International, receive the Nobel Peace Prize, and just recently announced, at age 92, his latest book project to add to the 29 books he's already written. President Carter keeps proving he still has room for growth.

Growth is about striving and achievement. Positive engagement

from the growth driver is a result of change that comes from growth. Positive engagement from growth is all about change. For example, let's say you got that big promotion. You will feel great as soon as you find out, and you'll likely ride that feeling for the next few months.

But eventually, you will settle into the new normal, operating at that new level with that new status. Once that stability sets in, the growth effect on engagement wears out. To continue to drive engagement with the growth driver, you need to keep growing, keep changing, and keep striving for that next achievement.

Growth can be either intrinsic or extrinsic. Extrinsic examples of growth involve other people. The engagement and happiness we get from extrinsic growth and rewards



Anything that forces us backward on our growth journey is bad for engagement.



STRIVING FOR THAT NEXT ACHIEVEMENT, PURSUIT, OR CHASE IS AT THE CORE OF THE GROWTH DRIVER.

comes from the recognition and accolades provided by others. Examples of extrinsic growth include:

- Promotion to a new level within the organization and a new, bigger office
- A compliment or some form of admiration from others
- Material possessions, like a bigger car, or a bigger, more expensive house
- Something as simple as someone laughing at the joke you just told

Perhaps more important to our long-term engagement and happiness are examples of growth that are more intrinsically rewarding. Examples of intrinsic growth include:

- Learning something new
- Mastering a skill, such as learning to play a song on a musical instrument, conversing with someone in a new language, or using a new tool or software application
- Seeing someone else achieve something because of something you taught
- The simple act of making your bed in the morning and the satisfaction you get from the look of your clean bedroom
- The sense of accomplishment you get from getting that workout done before work starts

Chris Reinking, one of Jabian's founding partners, tells a story about the history of Jabian's thought leadership that illustrates the difference between extrinsic and intrinsic

growth. Before *The Jabian Journal* existed, Chris and our other founding partners looked to encourage consultants to write articles. Simply asking and setting a goal wasn't working, as consultants were very busy with client work. However, even after offering a reward (an extrinsic motivator), no one took them up on the offer.

A couple of years later, a few of us had written enough thought leadership pieces to create something big. The partners had the idea to create a journal out of what we had developed. Once the journal was published, our people were very excited (an indicator of intrinsic motivation) about the high quality of the writing and the graphics.

Since then, we have not had trouble filling *The Jabian Journal* with quality content. People are intrinsically motivated to write when they know they have a platform where their writing makes an impact.

Of course, like all the engagement drivers in the Jabian Engagement Framework, a lack of growth will be a negative hit to our engagement. Anything that forces us backward on our growth journey is bad for engagement. Rather than take the time to talk about those hits to our growth, we'll leave it to you to flip around each of the positive growth components we have discussed and figure out what the negative version of that might look like.

So, what can you do to feed the growth driver? Here are a few ideas you can use to positively affect the growth driver.

- Define "purpose" to enable the intrinsic rewards that come from living up to that purpose.
- Set goals. Growth comes from achieving goals.

- Break down tasks/goals into small chunks; celebrate the smaller, interim milestones.
- Provide time and capacity for learning new things.
- Set aside some percentage of time for pet projects.
- Instill a growth mindset into your organization. Recognize effort and practice. Reward and learn from failure and experimentation, rather than punish it.
- Define processes for routine operations to free up creative energy for innovation.
- Provide people with the tools necessary for creativity and entrepreneurship, including platforms like *The Jabian Journal*, for personal and professional growth.
- Provide learning and development opportunities for yourself and your people. Include informal learning, like reading books together, discussion groups, and group brainstorming around a problem.
- Be vocal about the importance of personal growth.
- Make intrinsically motivated growth expectations part of the culture. At Jabian, we have an informal "grow or go" expectation rather than a traditional extrinsically motivating level-based "up or out" policy common in other consulting firms.
- Conduct check-ins with mentors or an "accountability buddy" to make sure you're staying true to your goals.

- Make your accomplishments (or failures) visible. If you're looking to lose weight, for example, graph your weight over time to highlight when you are making progress or falling off the rails.

Growth is a powerful driver of engagement in individuals and organizations. Try implementing some of the ideas mentioned in this article, and keep an eye out for ways in which you may be inadvertently minimizing the chances for growth within your organization. ●



Relationships



Jonathan Haidt, a neuroscientist at the University of Virginia and author of “The Happiness Hypothesis”—a review of the ancient wisdom, philosophy, and neuroscience associated with happiness—concludes that a key ingredient to overall happiness is being in a close relationship with at least one other person.

Strong relationships, coupled with positive growth form the foundation for long-term happiness and engagement. The remaining four engagement drivers (autonomy, security, fairness, and well-being) are critical to round out our overall engagement and create focus, but growth and relationships are the only two drivers with unlimited upside.

We tend to think of relationships as intimate and romantic, but relationships can also be intimate and platonic, or friendly. Intimate and friendly relationships can result in “agape” love, or selfless love of one person for another without a romantic implication. This is the type of love we often seek and develop in our friendships. We can even develop these deep relationships with our professional colleagues; having close friends at work is a key factor in employee engagement.

The effect of positive a positive relationship on our brains is chemical. When we connect with another person, our brains release oxytocin, often referred to as the neurotransmitter of connection. We get a shot of

“
**WHERE
THERE
IS LOVE
THERE IS
LIFE**
”

– Mahatma Gandhi

oxytocin each time we find something we have in common with someone else, hold hands with a romantic interest for the first time, or accept a friend invitation on social media from someone we like or respect. The great feelings we get from relationships are the result of our brains being awash in extra doses of oxytocin.

Great relationships inspire us and bring us energy. The more energy we have, the more likely we are to give that extra 10 percent at work, to help out our colleagues, to finish that assignment early. However, like all of the drivers in our Engagement Framework, relationships can also be negative, bringing stress and conflict that decrease our engagement and willingness to give more.

It’s the sum of all the engagement drivers that matter for engagement. So long as the net effect of the sum of all the drivers is positive, engagement will be positive. One of the best ways to compensate for people feeling a lack of security about the future, for instance, is to change the environment to help develop better relationships. Sponsored activities like a holiday potluck over lunch, happy hour, an evening outing, or an after-work group volunteer activity can go a long way to deepening relationships between people, which increases engagement. That increased engagement from better relationships can help the employee through a difficult change, time of uncertainty, or job insecurity.

In our model, relationships aren't just about connecting to an individual. Connecting with groups of people also falls under our definition of the relationships driver. Relationships to others or groups of others are important in many areas of our lives and could involve our:

- BOSSES
- CHILDREN
- CITIES
- COMMUNITIES
- COMPANIES
- COUNTRIES
- DIRECT REPORTS
- FRIENDS
- NEIGHBORHOODS
- PEERS
- SPOUSE
- TEAMS

If you take a moment and consider each of the relationships in that list, you will probably be able to come up with at least one example for each category that increases and decreases your happiness or engagement. Our connection with our team, company, community, and even country can positively or negatively affect our engagement. We may have a great relationship with our spouse and kids, but if we can't stand our boss, or our company creates a product we don't believe in, we're not going to be happy for at least the part of our lives dedicated to our work.

So, what can you do to positively affect the relationships driver and increase happiness and engagement at work? Here are a few ideas:

- Sponsor activities that allow people the time to get to know one another. It often takes a lengthy conversation to find things you have in common with someone else.
- Hire people whose values align to your organization's purpose. People whose values align are more likely to form positive relationships.
- Establish funding for your team members to take someone new out to lunch or spend a few hours volunteering together
- Work team-building and "getting to know you" activities into your team meetings.
- Sponsor fitness or other activities that bring people together for extended periods of time in non-work-related conversation.
- Create spaces in the office where people will gather to talk and get to know one another.
- Organize your teams so that the functions in the organization that require the closest relationships are on the same teams. If you are having problems with relationships in your organization, take a hard look at your organizational structure to see if you can influence improved relationships with a different reporting structure or changing the work environment so teams must sit with adjacent teams.

- Provide virtual work teams with video conference, chat, and collaboration tools (see the recent article by Kathleen Lorey for more ideas on building relationships in a virtual work environment).
- Communication is a key factor in any relationship. In fact, it's impossible to build a relationship without verbal and nonverbal communication.



- Train teams and individuals on tactics and best practices in building relationships, especially those who are less comfortable with this key skill. Skills in communicating effectively, whether that's written, verbal, or nonverbal communication, can also be taught. Assume that everyone has these key skills at your own peril.
- Rearrange your work space to place people who need to build relationships with one another near each other. Proximity to one another is a key factor in the quality of relationships.

Rearrange your work space to place people who need to build relationships with one another near each other.

PROXIMITY TO ONE ANOTHER IS A KEY FACTOR IN THE QUALITY OF RELATIONSHIPS.

Relationships are a critical driver of engagement. These ideas are just a sampling of the many ways we can do a better job of connecting people and encouraging better and more relationships. It's also important to take a hard look at your organization to discover where relationships aren't that great, because conflict and stress can devastate engagement. Great relationships engender commitment to one another and loyalty to our organizations.

How could you improve your relationships to increase your engagement? ●





Autonomy

MICROMANAGEMENT. TEDIUM. CONSTRAINTS. RESTRAINTS. INCARCERATION. POLICIES AND RULES THAT RESTRICT OUR FREEDOM.

Those are not very engaging words or ideas, are they? We recoil from most of them because they restrict our autonomy. Having the right amount of autonomy is a key driver of engagement. Autonomy covers several different concepts, including flexibility, freedom, the ability to make choices, and a lack of tedium.

In Jabian's Engagement Framework, we tend to think about autonomy as the amount of freedom people have in choosing how they work, who they work with, what they work on, and when and where they work.

Short of being your own boss in your own organization, it's rare to find a role in any organization that allows complete autonomy on all of those fronts. And that's a good thing for most people. Growth and relationships, the two engagement drivers we last wrote about, have unlimited upside. Autonomy, though, has a sweet spot for everyone.



How Much Autonomy Is Too Much?

Too much autonomy can stress us out. If you started in a new role and your new boss said simply, "Welcome to the team. Good luck!" you'd probably feel pretty uncomfortable. Conversely, we often don't know how much we appreciate the autonomy we have until it's taken away.

How do we decide how much is too much? One trigger that indicates that you have too much autonomy is when you start to feel "out of sight, out of mind" with your home team, including your boss, peers, direct reports, and boundary partners. If you are not being tapped as often for ad hoc assignments, projects, or even brainstorming sessions, you may be experiencing too much autonomy and will need to reconnect with your colleagues.

We're all comfortable operating within a framework. Even when we manage ourselves, we put guidelines and constraints on ourselves to ensure we are fit, healthy, and otherwise engaged with the world. Stress comes from a lack of purpose, goals that guide our actions, and norms we use to work with our coworkers, family, and friends.

If we have too much autonomy, we're often frustrated by the lack of structure and guidance, or we get lost, become distracted, and lose focus on what's important to ourselves and the business. Some of us need constraints to get things done, such as a deadline, say, to write an article for your company's publication. Others might tackle tasks as soon as they are assigned and beat deadlines by weeks—but they can't work at home because there are just too many distractions. Sometimes,

it takes someone else to point out that we're not productive when we have too much autonomy.



What If the Level of Autonomy is Not Enough?

When there's too little autonomy, it may be because there's too much direction or micromanagement of the work. The ability and willingness to do and think independently decreases. Employees can develop a "why should I?" attitude and become complacent. Teams start to look like, act like, and think like the leader because only the leader's decisions are implemented. Fewer promotions are granted out of a team with lower levels of autonomy because new skills are not being developed and there's less growth overall.

So, the sweet spot for autonomy is highly individualistic. As a manager, it's important to understand the level of autonomy each of your team members desires and can manage.



Autonomy and Policy

Some of the most contentious and challenging policy decisions we see companies struggle with have to do with autonomy. Policies around teleworking, flexible hours, and paid time off are great examples. Again,

everyone has a sweet spot when it comes to maximizing autonomy.

For example, we've seen companies with thick policy manuals defining exactly when teleworking is allowed. They outline to the nth degree the specific setups and situations employees must have at home (or other remote office locations). Some people prefer that kind of specificity. They want to know what it takes to avoid breaking the rules or facing a difficult conversation about expectations.

Others want to be unencumbered and prefer a policy that simply says, "work it out with your supervisor and do the right thing."

What's the right answer? There's not one because, of course, it depends. It depends on how aligned your organization is around your organizational values, which include tenets such as mission, vision, purpose, and values. If an organization:

- has achieved strong alignment around its values;
- fosters strong relationships across all levels of the workforce;
- and has a workforce that treats colleagues, company, and customers fairly...

...then a "do the right thing" kind of policy around telework, flexible hours, and even unlimited paid time off can work.

Lack of alignment across those tenets usually spurs leadership to apply strict policy and strong governance. The problem with strict policy and strong governance is that it tends to treat everyone the same, and as we've mentioned, the ideal level of autonomy is highly dependent upon the individual.

The organizations with the most engaged and fulfilled workforces find ways to tailor autonomy to the individual. That requires trust, strong

relationships, and deeply felt and well-adopted values. Employees who build trust with their supervisors will find themselves gaining more and more autonomy, but those who violate that trust will usually see their leadership finding ways to put constraints in place.

In a "do the right thing" policy environment, communication is key. Employees and their supervisors may perceive "the right thing" differently unless there's a direct conversation about "the right thing." The employees may perceive that their boss expects them to be at their desks all day, every day, but rather, their boss is happy to allow them flexibility to work at home occasionally. Having those individual conversations around autonomy is key.

Individual conversations are also key to defining how work is accomplished. What process should be followed to reach a goal? Who should I work with to achieve that goal? Leaders who micromanage their employees

Tedium's Effect on Autonomy

Tedium is another aspect that affects engagement. Tasks people find tedious adversely affect autonomy. A quick poll on Facebook and LinkedIn about what tasks people found tedious elicited responses such as:

- Doing laundry, especially matching socks
- Emptying the dishwasher
- Sifting through emails, especially ones with large distribution lists
- Unfocused conference calls with too many attendees
- Answering the same questions over and over again
- Comparing multiple documents to find differences
- Updating status and availability in multiple places or formats

Most of us would rather spend our time doing something more fun, or at least less tedious, than most of those things. Do your best to eliminate tedium for people through more efficient processes, better technology, and the right level of oversight.

It's interesting that nobody said "cutting up lettuce" in our informal poll. We suspect that problem was solved with the widespread availability of prewashed and cut bags of salad greens at five times the cost of a head of lettuce. This costly convenience factor should be an indication of how important it is to address tedium (and how much of a business opportunity tedium represents).

want to dictate exactly how and with whom a task must be accomplished.

Sometimes, that makes total sense. That may be the best approach when safety or product quality is at stake, or when the leader is certain they know the best (and only?) way to accomplish a task. In most cases, however, allowing employees to choose how they get their work done allows for diversity of thought and the potential for gaining new and more efficient processes.

The ability to experiment and try new ways of working is a key to innovation. Without the autonomy to try new things, we stifle growth. A strong relationship, good communication, and the right level of autonomy is key to efficiency and innovation.



THE ORGANIZATIONS WITH THE MOST ENGAGED AND FULFILLED WORKFORCES FIND WAYS TO TAILOR AUTONOMY TO THE INDIVIDUAL.

Control leads to compliance; autonomy leads to engagement.

—Daniel H. Pink (author of Drive)



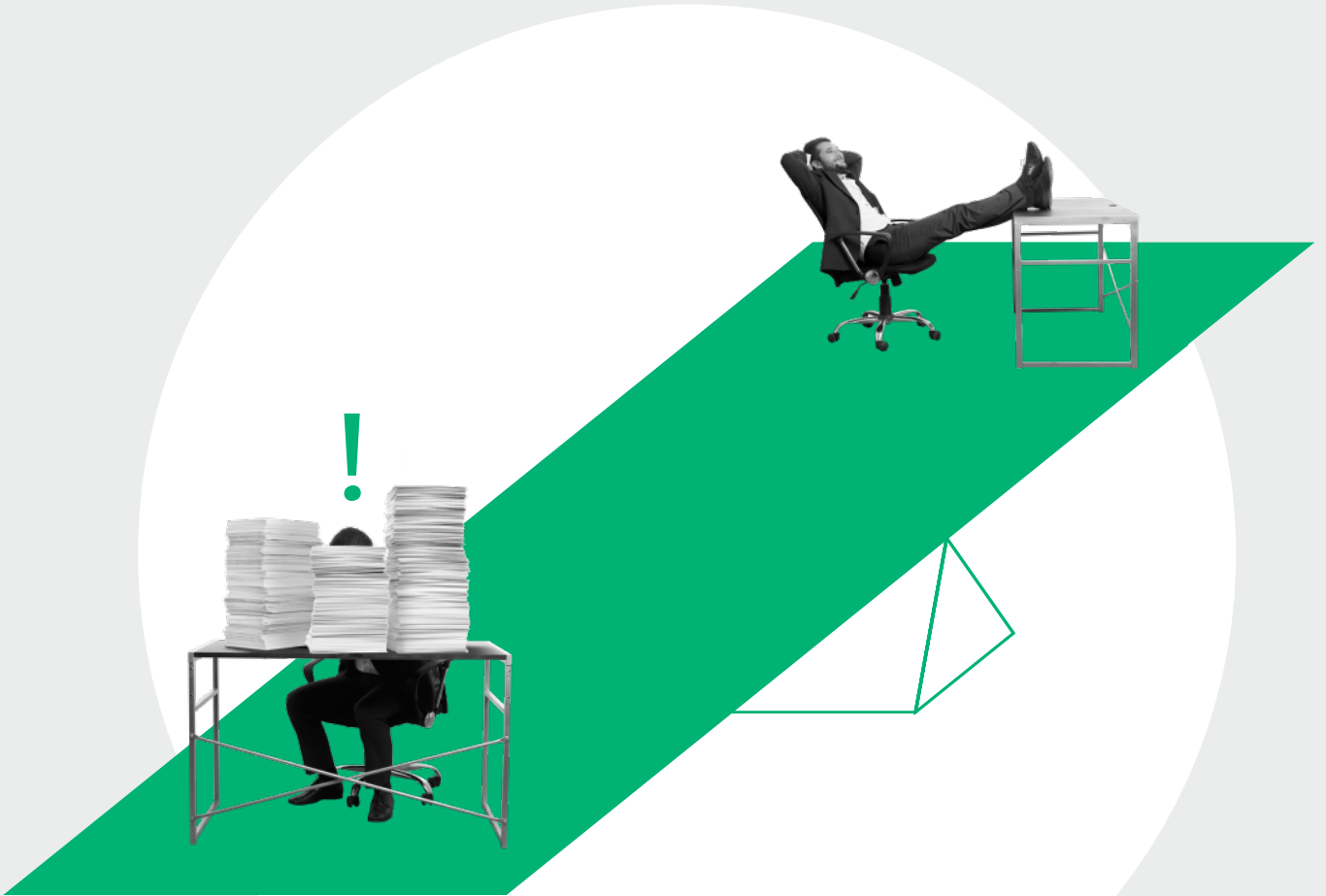
The Right Level of Autonomy

Finding the sweet spot for autonomy is an ongoing task that requires constant communication and reevaluation of the current situation. It's different for every individual. But when you find it, you can integrate work with your personal life in a healthy and guilt-free way.

Role clarity increases because teams are aware of decision-making rights, expectations, and team responsibilities. Employees are more likely to take on stretch assignments because their engagement level may be higher. Innovation is encouraged and valued.

So how do you do this? Take the time to talk with your team members. Have a conversation with your boss about his or her expectations. Share your preferences and work through what it would take for your supervisor to comfortably provide you with the autonomy you'd like.

And as a leader, figure out what level of autonomy your team can handle. You might find that getting more alignment around purpose, goals, and values allows you to provide more autonomy to your workforce which, in turn, spurs more growth and innovation. ●



Fairness

Fairness is related to many other concepts, including equity, justice, and ethics. At Jabian, we see fairness and equity as nearly synonymous. We even considered equity as the name of this driver in our model, but because we can also use that term to talk about financial equity, we chose fairness to increase clarity.

Fairness and justice are related, but different. Fairness is emotional, something we can even observe in other animals (for a fun illustration of this concept, check out an excerpt of Frans de Waal's "Moral Behavior in Animals" TED Talk¹). Fairness is an individual perception and a feeling. We can think of "justice" as "institutionalized fairness." Justice is based on defined rules built on values with a defined process for its administration.

Effective administration of justice doesn't necessarily ensure the perception of fairness in everyone involved, but maximizing the perception of fairness ought to be the goal. In fact, as an organization or a country evolves and changes, policies and laws must also evolve to ensure a sense of justice. Labor strikes, lawsuits, and protests are the result of unfairness that can be addressed through changes to our policies and laws.

Ethics, the study of right and wrong behavior, is rooted in philosophy and morality, and is more closely related to justice than fairness. When we said "maximizing the perception of fairness ought to be the goal" a moment ago, that was an opinion based on ethics.

When we perceive something as unfair, it becomes a major distraction. When we feel we're being treated unfairly—or even when someone we care about is being treated unfairly—it's difficult to focus. The good news is that when we're being treated fairly, we don't even notice it. Once things are fair, making things "more fair" doesn't make a difference—or even really make much sense.

Fairness in your organization is table stakes for an engaged workforce. When we experience fairness, we have the energy to focus on the other drivers of engagement and fulfillment.

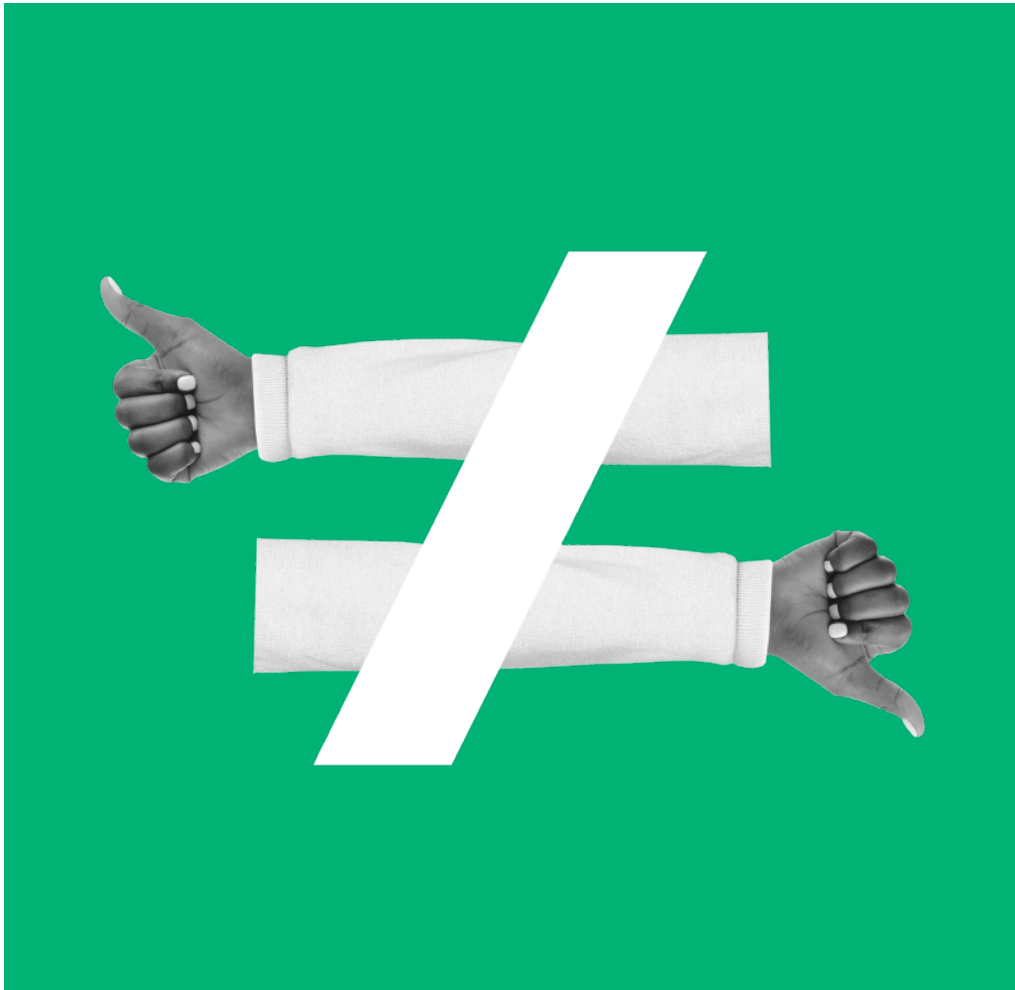
So, what causes unfairness? When we perceive we must do something

"ONCE YOU UNDERSTAND WHAT A MESSY, EMOTIONAL, AND DESTRUCTIVE DYNAMIC 'FAIRNESS' CAN BE, YOU CAN SEE WHY 'FAIR' IS A TREMENDOUSLY POWERFUL WORD THAT YOU NEED TO USE WITH CARE."

Chris Voss, former FBI hostage negotiator and coauthor of *Never Split the Difference: Negotiating as If Your Life Depended on It*

that someone else doesn't have to do, or when someone gets something we think we should get, or when we're unreasonably treated differently than others when we should not be, unfairness kicks in. We become distracted, disengaged, and less productive if we perceive unfairness in workplace policies, promotions, school grades, comments by others, etc. This type of distraction can cause productivity to plummet, fast.

We may even be so distracted we no longer recognize or appreciate the reasons we maintain relationships with our coworkers, companies, schools, friends, or loved ones in the first place. When we get to that point,



the other drivers of engagement often can't help us get over the perceived lack of fairness we carry.

Fairness issues in the workplace usually result from an organizational change. We've observed that many leaders and organizations are blindsided by fairness issues. When you change anything within your organization, or your interactions with others, it's important to put yourself in your stakeholder's shoes. Look for how the change might be perceived as unfair in any way.

Anticipating how stakeholders will perceive a particular change from a fairness perspective allows us to use appropriate change management techniques, and other engagement levers, to acknowledge why some may perceive the change to be unfair. Then we can explain the rationale behind the change while we address the perception of unfairness.

In the workplace, organizations use rules and policies as levers to drive behavior. Rules are put in place to provide consistency across the employee base. However, when an individual perceives those rules to be unfair, he or she will spend increased energy and thought-power on the inequity. Productivity decreases and overall engagement with the organization diminishes.

For example, consider gamification: What happens when organizations introduce games into the culture? Competitive employees often view gamification as a way to get ahead, learn something new, or gain exposure to new faces and executives within the company. The employees who are not as competitive, or motivated by the growth engagement driver, may not view the games as something in which they want to participate.

Does this handicap them in terms of how they get ahead? If they perceive the games to give an unfair competitive advantage, employees may rebel and disengage from the game and from the organization entirely. We need to be sure our gamification strategy takes that risk into account.

As leaders, we have tools to ensure that fairness issues are minimized.

Take a broad view. Ensure that the stated purpose, goals, and strategies are fair for all stakeholders involved. Take a broad view of stakeholders; include the community and the environment along with employees, customers, and investors.

Balance resources. Provide the capacity and resources to perform roles equitably across the enterprise. While it's not possible to make this perfect, avoid overloading one function or group of employees at the expense of another.

Manage diversity. Hire for and manage to a diverse workforce. Create opportunities for everyone to share and communicate their ideas and suggestions to improve the organization.

Communicate. Especially one-on-one. Communicate fairly. Individual interactions are often the cause of fairness issues in the workplace. The more aware we become of how others perceive our actions, the more harmony we can bring to the workplace.

Conduct training. Create awareness of bias, generational behaviors, and other blind spots that can cause fairness disruption and discomfort.

Establish rules of the road. Put policies in place that maximize fairness across the enterprise and administer them in a way that ensures due process for anyone affected.

Leverage tech. Use technology to create opportunities for everyone to have a voice and raise issues, allowing you to react quickly to head off a fairness crisis.

Manage space. Design and use space within the workplace equitably. Avoid creating a situation of “haves and have-nots” by outfitting one building or floor with cool new space or furniture while others are stuck in old, outdated space.

Accommodate individuals. Be as accommodating as is practical to dietary restrictions, as an example, and workplace preferences. It can be difficult to accommodate every nuance, but making the effort to do your best will go a long way.

Measure performance fairly. Put metrics and objective criteria in place to evaluate performance and adjust appropriately. When someone isn't performing as expected, address it as quickly as possible. Transparency and visibility are key in making performance management fair.

Value transparency. Govern your organization as transparently and equitably as possible. Be clear about decisions, including why and how they were made. In the absence of information, people will make up their own stories to explain why things happen the way they do. As the leader, you can set the record straight from the beginning, before the rumor mill takes over.

Fairness is a challenging engagement driver to manage because the perception of fairness belongs to the individual alone. The good news is that by anticipating the reaction to change before it happens, and by having the discipline to quickly address any missed issues, we can keep our workforce focused, engaged, and fulfilled. A workforce that avoids spending time focused on fairness has the energy and ability to focus on the other drivers of engagement. ●

Source:

- 1 Frans de Waal's "Moral Behavior in Animals" TED Talk, <https://www.youtube.com/watch?v=meiU6TxyScg>



Well-Being



SINCE WE SPEND MOST OF OUR WAKING TIME MONDAY THROUGH FRIDAY AT THE OFFICE, "FUN" KEEPS US ENTERTAINED, LESS STRESSED, AND ULTIMATELY ENGAGED.



BE FOREWARNED THAT "FUN" EVENTS LIKE MANDATORY HAPPY HOURS, TEAM-BUILDING ACTIVITIES, AND OTHER OUTINGS CAN BACKFIRE AND HAVE THE OPPOSITE EFFECT ON ENGAGEMENT.

Well-being includes our physical and psychological health. If we are injured or psychologically unhealthy, it is challenging to be engaged in our work, and even our lives. Well-being, like the other drivers, is difficult to measure and sometimes difficult to control, but it is often one of the first to be noticed when it's out of balance. When we don't feel good, we aren't engaged with what we're doing or who we're with. How we feel physically, our pace, our moods, and the "fun factor" all play into well-being.

Originally, we called this driver "wellness." After all, many organizations have embraced "wellness" programs, recognizing that a healthy workforce is more engaged and productive. Wellness, however, seemed to encompass too narrow a scope for this driver. When one of our colleagues was reviewing the model with us, he remarked: "I'm not sure wellness is the right word here. If I have a great week at work, pick up a bag of potato chips and a six pack of beer, and sit on the couch watching football all day, I wouldn't call that wellness. Well-being maybe, but not wellness." So, there you have it. We renamed the driver "well-being."

When we feel bad, we can become distracted and hobbled by that pain or distress. Of course, that pain or distress might be caused by other engagement drivers, such as something unfair, or a conflict in a relationship. The engagement drivers

in our model are not mutually exclusive. Physical and psychological pain, however, are inherent in the human condition; they can't be touched directly but can be influenced by the levers in our framework—which is why well-being earned a spot as an engagement driver.

Another reason we include well-being as a driver came from a discussion we had with one of our colleagues on an early version of the framework. As a business owner, he was confused as to how money, or compensation, could not be a driver of engagement. We're jumping ahead a bit because we consider "money" to be a lever, not a driver. It's what you do with the money that drives engagement, such as saving for the future (security), paying off debt (autonomy), spending it on someone you love (relationships), righting a wrong (fairness), or achieving a new personal best (growth). But what if you just take that money and go get

a massage, or get a joint replacement to eliminate pain, or buy that bag of potato chips and a beer? That's using the money for well-being.

Health is a key underpinning of well-being. Many organizations now offer health or fitness programs as an employee benefit. However, the definition of health varies for each individual. While one employee may define health as a vegan lifestyle with multiple workout sessions per week, another may define health as "free from pain." Flexibility in the application of health programs is important. If you offer your employees wellness dollars to apply to a fitness club, it's wise to include options like a massage to cover those employees less able to (or prone to) work out. That way, with either option, you're addressing their definitions of well-being.

Pace is another factor in well-being. It's the speed and intensity at which we are working. Is it steady? Or are there peaks and valleys of activity? Are we working so fast that we don't have time to think? Is the pace so intense that we are burning out or making ourselves sick? Is the pace so slow that we're not seeing enough progress and becoming bored? Again, finding that sweet spot for each individual is important, and tailoring that pace can fuel the well-being engagement driver.

The idea of "fun" is also an important element of well-being. Although one can argue that we're not at work to have fun, fun is a critical part of employee engagement. Since we spend most of our waking time Monday through Friday at the office, "fun" keeps us entertained, less stressed, and ultimately engaged. Be forewarned that "fun" events like mandatory happy hours, team-building activities, and other outings can backfire and have the opposite effect on engagement. Individuals must decide for themselves how much fun, and what kind of fun, they want to have at work to remain balanced.

Lastly, the idea of enjoyment plays a part. Like fun, enjoyment as a dimension of well-being aligns more with purpose and joy. Do you find enjoyment in what you are doing? Are you deriving positive energy from your work? Do you understand how what you are doing relates to a bigger purpose in your life? Ultimately, does what you do bring you joy? That's the core of enjoyment, a major part of the well-being driver.

IT'S USUALLY PRETTY EASY TO NOTICE WHEN WELL-BEING IS OUT OF WHACK. WE HURT, WE'RE SAD, WE'RE OVERWHELMED, AND WE FIND OURSELVES IN A BAD MOOD. WHEN THAT'S THE CASE, THERE ARE A VARIETY OF LEVERS WE CAN PULL TO ALTER OUR WELL-BEING DRIVER AND INCREASE ENGAGEMENT:

We can anchor back to purpose and look at whether the time we're spending at work and in our personal lives aligns with our own purpose and the things we find meaningful.



We can say no and control how much we take on. We'll often find that when we feel overwhelmed, we've overcommitted ourselves and are lacking the resources to feel good about the quality of work we can do in various aspects of our lives.



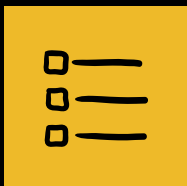
Medical technology, in the form of drugs, therapies, and surgeries, can help us alleviate or manage pain or illness.



The way we communicate can also bring us a sense of well-being. Chick-fil-A employees always respond to a thank-you with, "My pleasure." Phrases like "no problem" or "no worries" can imply that maybe it was a problem or caused me some worry. Positive language itself can create a sense of well-being.



We can put policies and rules in place, even personally, to make sure we stay healthy. Creating an identity for ourselves, for example, by being “the kind of person who works out almost every day,” or “the kind of person who doesn’t eat sweets,” or “the kind of person who always tries to have fun” can go a long way to promoting a sense of health and well-being.



Decorating spaces with fun or funny things can bring a smile to your colleagues’ faces. Jabian decorates the halls with photographs taken by Jabian employees, which always brings a smile to our team and visiting clients.



New technologies, especially wearables and mobile apps, can help us better track and monitor our well-being goals.



Taking the time to look back and reflect, through journaling, meditation, or even a meeting debrief, can influence well-being. Reflecting on the good things that happened and adjusting for the things that could have gone better inevitably create a sense of health and well-being.



Well-being, like the other engagement drivers, is deeply personal and varies from individual to individual. Teams, however, can take on common well-being practices. Organizations emphasize and cater to well-being differently and can create a culture that overvalues (or undervalues) well-being. Like all of the engagement drivers, aligning personal needs with the needs of the team and the needs of the organization will create the highest levels of engagement. ●



Security

AS A LEADER, IF YOUR PEOPLE ARE FEELING INSECURE, ASSESSING HOW WELL AND HOW OFTEN YOU'RE COMMUNICATING IS A GREAT PLACE TO START.

What happens when we are uncertain about the future? What happens when we feel vulnerable or unsafe? When our future is uncertain, or our security is threatened, we become distracted and have difficulty focusing on the here and now.

Any time we shift our attention to an uncertain future, playing out the “what-ifs” and imagining the unfavorable scenarios that could develop, our engagement is affected. In fact, our engagement can decrease to the point of unproductivity and inefficiency.

On the flip side, when our future is predictable and seems like a sure thing, we can shift our focus to growth and accomplishment, to improving relationships, to improving processes and reducing tedium.

Security is about certainty, clarity, and safety. Our need for security, like the other engagement drivers, varies by individual. Some people are very comfortable with ambiguity and an unclear future. Others want to know exactly what's going to happen next in their lives.

Once we get to a comfortable level of security, however, more of whatever it was that made us more secure (e.g., clarity, safety, money) doesn't increase our security further. Security has a limited upside once we get to “secure enough.” It is up to individuals to determine what “secure enough” means to them. Insecurity, on the other hand, has an unlimited downside. In fact, its downside is perhaps the most distracting and even the most paralyzing of all the engagement drivers in our framework.

Security is covered in the foundational layers of Maslow's hierarchy of needs. First we need food and shelter. Then we need to be healthy and safe. After that, anything that makes life more predictable and certain enables the top layers of Maslow's hierarchy, which focus on things related to autonomy, growth, and relationships.

Luckily, there are lots of ways we can improve our security. Anything we can do to make our outlook more predictable and comfortable will help. We outline some of those ideas here.

Clear Purpose and Goals: Understand the ‘Why’

Without clarity around what we're striving to accomplish in our work and in our life, we lose focus and wallow in the ambiguity that comes with ill-defined purpose and goals. Leaders who provide their teams with clear purpose in their work—setting clear, achievable goals—are more likely to ensure that their people will stay focused on their work and secure in their roles. Similarly, individuals who take the time to plan and manage their time to focus on what's most important will create for themselves a sense of security that allows them to grow, get things done, and build relationships that enhance their overall engagement.

Role Clarity

Lack of clarity about roles and responsibilities will affect security. Over time, the changing needs of the business or organization will necessarily drive changes to the documented and communicated role descriptions within the organization. The changes often creep into the roles across teams within the larger organization, muddying any clarity that differentiated the functions of each role or team and its contribution to the success of the department or organization.

Without role clarity, work that is critical but less interesting and engaging will always be set aside for more interesting tasks. This leads to

conflict between people and teams about accountability and who is responsible for what, creating stress and anxiety.

If people are saying things like “That’s not my job” or “It didn’t get done because I didn’t want to step on any toes,” there is probably a problem with role clarity. We can help everyone feel more secure by stepping back to review the organizational design and role descriptions.

Transparent Communication

Satisfaction with internal communication consistently ranks toward the bottom of virtually every employee engagement survey. This is a manifestation of the security engagement driver. People rank communication low because they have a sense of insecurity that results from not being “in the know,” not knowing what’s coming, or not understanding where leadership is headed.

What feels like over-communication to executives will still feel like too little to employees, but the more frequent and clearer we can be about our internal communication, the more we can take insecurity off the table and drive engagement. As a leader, if your people are feeling insecure, assessing how well and how often you’re communicating is a great place to start.

Skill and Knowledge

Tremendous insecurity can result when we feel like we don’t have the requisite knowledge or skill to perform our roles. Even when our peers

and bosses think we have the skills we need, we still often suffer from “impostor syndrome,” the feeling we get when we feel like we’re having to pretend we know more than we do to perform our jobs.

In fact, though, anytime we grow and strive, we’re stretching to step into something we have never done before.



SEE THE SPRING 2015 JABIAN JOURNAL ARTICLE ON PREPARING YOUR EMPLOYEES FOR STRETCH ASSESSMENTS: “CREATING SUPERHEROES IN YOUR ORGANIZATION”.

The stress we feel is natural and normal, but it still generates insecurity as we become more adept at new skills. Classroom training and certifications can always help, but simple things like reading books and articles or watching online videos that cover the topics we’re insecure about can help supply the background knowledge and language that allow us to build the skills and confidence we need to perform at the next level.

Clear Policies

Every organization has mavericks who are happy to break rules to get things done or make their work more engaging, but every organization has a high number of compliant rule-followers who just want to be told exactly what they must and must not do to stay out of trouble.

High-compliance people prefer specific guidelines and prescriptive

policies. Leaders must balance specificity with flexibility and align that balance with the desired culture of the organization. Either way, clarity is necessary.

For example, organizations often choose not to have a prescriptive work-at-home policy, preferring to leave the decision on the appropriateness of working from home up to each manager. To address the insecurity associated with a lack of policy, a briefly worded policy that says working from home will be handled on a case-by-case basis with the decision lying with each manager in the organization. That clarity provides a framework for the discussion each employee who wants to work from home can have with their manager. Note, however, that the engagement risk with distributing that decision-making shifts to fairness, the engagement driver we will cover in our next article.

Live in the Moment

Mark Twain once said, “I have lived through some terrible things in my life, many of which actually happened.” We often make ourselves miserable thinking too much about what might happen, and our bodies physically react the same just imagining a bad outcome as they would if we actually lived through that negative experience.

But how many times have we worried ourselves sick only to have things turn out perfectly fine? One strategy is to prepare and overprepare (without stressing yourself out!). Although that approach is simple, preparation is

THE MORE FREQUENT AND CLEARER WE CAN BE ABOUT OUR INTERNAL COMMUNICATION, THE MORE WE CAN TAKE INSECURITY OFF THE TABLE.

only half the battle; anticipating the reactions and questions to your big presentation will make you feel less anxious and more secure in the work you present.

Another strategy is to develop the skills required to “live in the moment,” focusing on the here and now, not worrying too much about things that might happen. Practicing meditation, learning not to catastrophize, and training ourselves to have a positive and optimistic outlook can do great things to improve our feelings of security.

Trust

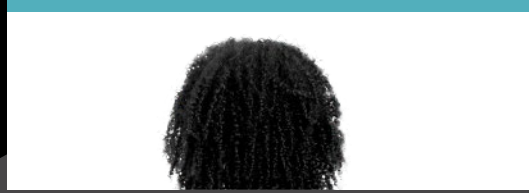
Trust is an interpersonal quality that is highly dependent upon security; in fact, it’s a combination of the relationship, security, and fairness engagement drivers. Trust is an outcome of accountability and predictability; you are more likely to trust people when they follow through in their actions and when you can

predict what they will say or do. Trust also requires a relationship, or at least a relationship by association (e.g., I trust Susan, and Susan trusts Steve, therefore I trust Steve, even if I don’t have a direct relationship with Steve).

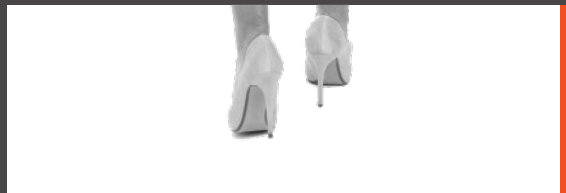
Benefits of Security

Providing an environment where your employees and loved ones are secure creates loyalty, which precedes engagement. Employee retention can affect bottom-line numbers and is more likely to be stable if employees understand the “why”; have role clarity; receive frequent, substantive communication; and have the support to gain the skills and knowledge they need to grow. By eliminating the distraction caused by insecurity, we can drive higher engagement through growth, relationships, and well-being, the drivers with unlimited upside for improving engagement. ●





Alignment Lever



Alignment components

After years of researching happiness and fulfillment, psychologist and author Jonathan Haidt at the University of Virginia wrote that “getting the relationships right between yourself and others, between yourself and your work, and between yourself and something larger than yourself” are keys to developing a sense of purpose and meaning.¹ We call this “alignment” and have broken it into five key elements we can more easily work with:

- PURPOSE
- GOALS
- STRATEGY
- CAPACITY
- BELIEF

Deliberately addressing these key elements before starting any endeavor will help maximize successful outcomes, whether as an individual, as part of a team, or as part of a larger project. Ignoring alignment increases risk and requires extra work. Just like it takes extra work to keep your car on the road when your wheels are out of alignment, it takes extra work to keep yourself, your team, or your project on track when purpose, goals, strategy, capacity, and belief are out of alignment.

Alignment also applies to the different levels of an organization. The more aligned an organization is within the community where it operates, the more leaders of an organization are aligned with each other, teams are aligned with their leaders, and individuals are aligned with their teams, the more energy everyone puts into the system.

TERMS	WHAT THIS MEANS	QUESTIONS TO ASK
PURPOSE	Mission Vision Values Calling “The Why”	<ul style="list-style-type: none"> • What is the mission of this effort? Do I/we agree with this mission? • How is the mission aligned with the bigger organization’s purpose? • How is the mission aligned with my individual and my team’s personal mission and purpose? How is this contributing to something bigger than ourselves?
	Direction Objectives Desired Outcomes Desired Results “The What”	<ul style="list-style-type: none"> • What are the specific goals I’m/we’re setting out to accomplish? • Do I/we clearly understand the goals and objectives? • Do my personal goals align with the goals of the project and the overall organizational goals?
STRATEGY	Planning “The How”	<ul style="list-style-type: none"> • How will we accomplish our goals? • Are there multiple levels of alignment to the strategy? Person, team, organization? • Is the strategy well-defined and known to others?
CAPACITY	Bandwidth Resources Execution Ability	<ul style="list-style-type: none"> • Do I/we have the bandwidth to do this work at the appropriate quality? • Do I/we have the mental and physical capacity for this project?
BELIEF	Fortitude Moxie Confidence Faith Self-efficacy Optimism	<ul style="list-style-type: none"> • Do I/we believe that we can be successful in delivering a quality result? • Are our expectations realistic? • Do I/we have optimistic confidence?

PURPOSE

Purpose defines the “why” behind what we do. Businesses spend the lion’s share of time managing toward extrinsic goals and motivations (e.g., as MBOs and performance targets) and almost no time talking about what is intrinsically motivating to individuals. Enlightened companies, teams, and individuals also have a clear purpose, something that explains why they do what they do, and its impact on making a difference in the world.

Disney’s purpose is “to use our imagination to bring happiness to millions.” Johnson & Johnson’s is “to alleviate pain and suffering.” If you’re a leader at Disney or J&J and want to get the most out of the people on your project team, you would find ways to communicate and demonstrate how the purpose of your project aligns with the purpose of the overall organization.

People intrinsically want to make a difference in the world. With alignment to purpose, you see the value of your contribution to your own growth and, more importantly, as Haidt states, “something larger than yourself.” At the individual level, it is worthwhile to take the time to work with each project team member to help them understand how their own purpose and goals align with the goals of the project. Without alignment, at best you’ll miss out on an opportunity to increase engagement and motivation, and, at worst, the work could turn out to be drudgery.

If you don’t know the purpose of your organization, or your people haven’t spent the time to understand how they are intrinsically motivated toward making an impact on something larger than themselves, exploring purpose is a great place to start.

GOALS

While it may sound trite, one of the most important things to get right before you start anything is to understand the goals for the project or initiative. Goals help get the relationships right between yourself and the rest of the people you’ll be working with, and between yourself and the work. Goals focus attention, increase effort, and increase persistence.² They increase security by providing clarity, and when they are achieved, they generate a sense of accomplishment, both keys to employee engagement. Actions can lead to results without explicit goals, but the achievement falls flat. It’s like saying, “I meant to do that” when something good happens without your planning on it. Luck is often important to a successful outcome, but it’s not fulfilling or engaging.

STRATEGY

Once we understand the goals, we must plan—or strategize—on how to accomplish them. Strategy as an engagement lever tells us the high-level “how” behind how our goals will be met. A good strategy defines the prioritized initiatives that will, collectively, meet our goals. It shows us the way forward and motivates us to drive to accomplishment. Strategy can be defined at multiple levels: person, team, and organization. As leaders, it’s our responsibility to promote alignment among each level, and to promote alignment between the leaders who will drive the execution of the strategy.

WHEN PROJECTS ARE IN ALIGNMENT, WE ARE

ABLE TO MAXIMIZE THE INTRINSIC MOTIVATIONS

OF INDIVIDUALS. THAT COHERENCE HELPS

PEOPLE GET INTO A STATE OF FLOW WHERE

TREMENDOUS AMOUNTS OF WORK CAN GET

DONE IN SHORT PERIODS OF TIME.

CAPACITY

The discipline to stop and understand if the capacity and resources to perform the work are available is another key factor in getting the relationship right between yourself and your work. This is all about individual bandwidth, financial resources, supplies, tools—everything you'd need to complete a project or build an organization. Starting without the right capacity or the ability to procure it ensures failure. Leaders should also take the time to analyze and understand the emotional and physical energy required to deliver. Can we manage this effort? Will our stakeholders be able to absorb this change? Will this fit in with the other initiatives already underway? Capacity, like all the engagement levers, can be considered at the individual, team, or organization level. Loading teams and individuals with too many “priority” projects results in multitasking, working at an unsustainable pace, a lack of focus, an inability to achieve flow, and, ultimately, burnout.

BELIEF

The last component of alignment, addressing the relationship between yourself and others as well as the one between yourself and your work, is to make sure that the entire organization believes that success is possible. Psychologists call this self-efficacy. High self-efficacy has been shown to improve performance. Think of this optimistic confidence as the opposite of cynicism and doubt. Individuals, teams, and organizations that generate a sense of optimism and focus on positive outcomes increase their likelihood of success. On the contrary, cynical talk and other indicators of doubt throughout the organization (e.g., Dilbert cartoon postings) are a red flag that should not be ignored. A sense of optimistic confidence and belief in the likelihood of success are motivating and reassuring during the more challenging moments of any endeavor.

When people are battling the gut feeling that the work they're doing is inconsistent with who they are, is not moving them toward a meaningful goal to generate a sense of accomplishment, and not contributing in a positive way to who they believe they are and why they're here, or when people sense that attempting this goal is futile, the amount of work to achieve success will likely exceed the energy that the individual or team is able to generate. Conversely, when projects are in alignment, we are able to maximize the intrinsic motivations of individuals. That coherence helps people get into a state of flow where tremendous amounts of work can get done in short periods of time.

Finding ways to align purpose, goals, strategy, capacity, and belief with confidence maximizes intrinsic motivation and creates coherence that drives outstanding outcomes and an engaged workforce. ♣



Sources:

- 1 Baumeister, Roy F., & Tierney, John (2011). *Willpower: Rediscovering the Greatest Human Strength*. New York: The Penguin Press. Haidt, Jonathan (2006)
- 2 *The Happiness Hypothesis*. New York: Basic Books. Mackay, John, & Sisodia, Raj (2013)



Implementation Lever

Implementation levers are the management levers applied when we want to make change happen or when we want to influence change. They are the tools available to support the people who do the work in an organization and the tools we turn to first to get things done. There are eight implementation levers:

PROCESS The flow and step-by-step tasks we follow.

TECHNOLOGY The tools we use.

COMMUNICATIONS How we transmit knowledge and information.

TRAINING How we learn and build skills.

POLICY How we establish rules, clarify expectations, and set boundaries for acceptable behavior.

COMPENSATION How we receive tangible value in exchange for effort and expertise.

ORGANIZATION DESIGN How we establish lines of authority and accountability for work.

INFRASTRUCTURE The physical environment in which we work.

Like each section of the Engagement Framework, these levers apply to individuals, teams, groups, organizations, and even society as a whole. Also like with each of the other sections, leaders should consider each implementation lever when undertaking any new project or transformation. Too often, we fail to consider all the levers at our disposal when driving improvement and change, whether in business or our personal lives. It is important to use all the tools at your disposal when attacking a particular challenge.

To help do that, the following table provides examples of the implementation levers and how they might affect the engagement drivers, either positively or negatively. As you can see, each of these levers can influence the engagement drivers in different ways. Creative application of these levers can result in a rich set of actions and ideas that will enhance any project, change, or transformation.

IMPLEMENTATION LEVERS ARE THE MANAGEMENT LEVERS APPLIED WHEN WE WANT TO MAKE CHANGE HAPPEN OR WHEN WE WANT TO INFLUENCE CHANGE.

LEVER	LEVER EXAMPLES	GROWTH	RELATIONSHIPS
PROCESS	<ul style="list-style-type: none"> • A process flow or a detailed, step-by-step way of doing things. • “Ways of working” within your team or company culture. • Career path definitions. • Examples of personal processes might include “Always put your keys in the basket when you walk in the front door,” journaling, a workout program, a recipe, etc. • A habit is an automatic process that starts with a cue, triggers a routine, and results in a reward. That reward is the positive feeling you get from one of the engagement drivers. Both good and bad habits follow this process. 	Processes provide the flow of tasks for us to complete, which in turn gives us a sense of accomplishment and positively influences the Growth driver.	Processes can influence Relationships. For example, an employee onboarding process can require meetings with people with whom the new employee will need to work, thus encouraging Relationship-building.
TECHNOLOGY	<ul style="list-style-type: none"> • Hand tools are simple examples of technology, e.g., a hammer, a screwdriver, etc. • Personal technology includes watches, eyeglasses, contact lenses, prosthetics, etc. • High technology includes phones, computer networks, laptops, the internet/cloud, etc. • Drugs (both medical and recreational), medical devices, etc. • Any tool/device that enhances performance of the user. 	Technology can improve or degrade the ability to accomplish things, affecting the Growth driver.	Relationships can be enhanced or degraded with the use of technology (e.g., virtual meeting platforms, mobile phones, cookware, etc.).
COMMUNICATION	<ul style="list-style-type: none"> • Anything that transfers knowledge from one person to another via our senses is a form of communication. • Written communication, including texts, emails, newspapers, newsletters, signs. • Auditory communication, e.g., verbal communication, ringtones, alarms. • Tactile or haptic communication, including Braille, vibration, electrical stimulation, etc. • Nonverbal communication, including posture, facial expressions, gestures, etc. • Smells can communicate and inform about situations (e.g., it’s time to eat, or watch out, there’s a skunk nearby!). 	Communication in the form of recognition can result in a feeling of accomplishment and Growth. Communication in the form of criticism can have the opposite effect.	Communication is critical for developing and maintaining Relationships. Poor communication can ruin Relationships.
TRAINING	<ul style="list-style-type: none"> • Training is used to develop skills. • Training can take many forms, including classroom training, virtual learning, coaching, mentoring, reading, and studying. 	Training helps build skills that let us accomplish tasks, enhancing the Growth driver. Learning anything new is Growth.	Training in relationship-based skills can help us enhance Relationships.
POLICY	<ul style="list-style-type: none"> • Policy is any type of rule that we put in place to establish consistency of action. • Company policy. • Laws. • Standards. • Regulations. • Corporate values. • Religious laws and practices. • Personal rules (I always do, I never do). 	Policies can help to encourage or even enforce Growth. Mandatory training, for example, is a way to drive Growth through learning.	Policies can help improve Relationships by establishing clear expectations about how others should be treated.
COMPENSATION	<ul style="list-style-type: none"> • Compensation is a special form of policy that we designate as its own lever in the Engagement Framework. We define compensation as anything of value exchanged for effort or expertise. Note that compensation itself is not a driver of engagement. Rather, it’s what you do with the compensation once you have received it that results in engagement. 	An increase in compensation in and of itself is an accomplishment, resulting in positive impacts to the Growth driver. Conversely, a demotion or reduction in salary will affect the Growth driver in a negative way.	Money can be spent on others (for example, putting your children through school or buying a gift for a loved one) which can improve Relationships.
ORGANIZATION DESIGN	<ul style="list-style-type: none"> • Also a special form of policy, organization design is the hierarchy of who reports to whom, and it is established by some level of leadership. Because it is such a common implementation lever, we’ve included it in the list of levers in the Engagement Framework. 	Organization design can help inspire Growth by helping people see how their careers can evolve. It also provides for clear promotion points, each of which is a positive influence on Growth.	Organization design helps to communicate the key Relationships that people in the organization should look to foster.
INFRASTRUCTURE	<ul style="list-style-type: none"> • Infrastructure encompasses the space and physical environment in which we work, including walls, ceilings, lighting, desks, air quality, noise, etc. 	Without the right infrastructure and environment, it can be difficult to accomplish tasks, resulting in a negative hit to Growth. For example, if we are assembling electronic components and the lighting is dim, we won’t be as productive, affecting Growth.	Open workspaces can increase collaboration, improving Relationships, and Innovation/ Growth.

AUTONOMY	FAIRNESS	WELL-BEING	SECURITY
Processes, if they are onerous or tedious, can negatively affect the Autonomy driver. Even good new processes tend to negatively affect our Autonomy, but the effect goes away once those new processes become habit.	Processes can positively or negatively affect the Fairness driver. "Due process under the law" is intended to provide for a fair process.	A morning routine can include time set aside for journaling, meditation, or exercise, all of which could contribute to an increased sense of Well-Being.	Processes provide clarity on the work to be done, positively influencing the Security driver.
Technology can help reduce tedium, which enhances Autonomy (e.g., scanning ballots, report generation, spreadsheets, etc.). Technology can enable Autonomy and flexibility (e.g., virtual meeting platforms, mobile phones, wheelchairs, prosthetics, etc.).	Technology can be used to drive Fairness. For example, a digital lottery can be used to randomly distribute a limited number of available seats to a concert when more people requested seats than are available.	Exercise machines, medical technology, and drugs can help to improve Well-Being.	Surveillance technology and weapons held as a deterrent can enhance Security. Technology can also be used by one party to hinder the performance of another party (e.g., weapons, cyberattacks, etc.).
Clear communication around expectations is the foundation for delegation and allows those delegated to the opportunity to work, make decisions, and solve problems independently.	When communication is withheld from someone, it can result in feelings of unfairness.	Communicating knowledge and creating awareness about unfair treatment of individuals and groups can improve Fairness. Communication can affect Well-Being by creating joy and fun.	Communication helps to reduce uncertainty, enhancing Security. Propaganda can also be used to reduce Security.
Skills provided to their team members can help leaders manage less and delegate more, improving Autonomy.	Withholding training can be viewed as unfair, resulting in a negative hit to the Fairness driver.	Training someone to properly exercise and eat will improve Well-Being.	Without skills, taking on a complex work can create insecurity. Training can create certainty and Security around work performance.
Policy can create freedom (for example, by establishing the right to assemble), thus improving Autonomy.	Perhaps most importantly, policies help to ensure Fairness by ensuring fair allocation of resources, fair treatment, etc.	Individual policies, such as "I never eat sweets," can result in a healthier lifestyle. Collections of policies can help create a system of living that results in a sense of Well-Being for those who adhere to those policies.	Policy improves Security by establishing rules and standards designed to create a level of certainty about how others will behave.
Additional compensation can be used to pay down debt, which enhances Autonomy.	An increase in compensation can help right a wrong, increasing Fairness, e.g., "I should be making the same amount she does because we do equal work." Be careful with this one, though, as increasing one person's compensation over others can be seen as unfair.	Compensation can also be spent on enhancing Well-Being, e.g., with a fitness club membership, a massage, surgery to heal an injury or illness, etc.).	Additional compensation can be saved for the future, which enhances Security.
A new organization design can result in a hit to Autonomy for someone who has not been managed or led consistently.	A new organization design can be perceived as unfair if we believe that we deserve a higher position, or that we shouldn't be at the same level as someone we consider to be less talented or experienced.	A well-designed organization removes friction, minimizes conflict, and balances workload, which in turn reduces stress and improves health.	Organization design creates clarity about who employees can turn to for help, who they are accountable to, and to whom they can delegate work, improving Security.
Infrastructure can be used to limit Autonomy (for example, prisoners locked up in a cell).	Infrastructure can enhance Fairness. For example, the United Nations Security Council meets at a round table, limiting any implied positional authority to individual members.	Aesthetics and beauty can have a significant impact on Well-being and joy. This is one reason the corner office with floor-to-ceiling windows is highly desirable (along with, of course, the status that office projects, which is a Growth effect).	In the case of using infrastructure for a prison, it is interesting to point out that one person's limited Autonomy is another person's enhanced Security. We can also use infrastructure to enhance our physical Security at home, for example, by locking a door or building a fence.




Governance Lever



GOOD GOVERNANCE HELPS ENSURE THAT WE ARE WORKING AS PLANNED, ACCOMPLISHING OUR GOALS, AND STAYING ALIGNED WITH OUR PURPOSE.

Governance is how we keep ourselves, our teams, our organizations, and our society on track. It's how we prioritize and maintain focus on the values that are most important to us. It's what keeps people and things moving, focused, and evolving. Good governance helps ensure that we are working as planned, accomplishing our goals, and staying aligned with our purpose. And when we veer off track, governance helps us identify the actions needed to correct course.

Measurement and control are the two levers that constitute the governance category in the Jabian Engagement Framework. Measurement is a precursor to control and can be both quantitative and qualitative. Like goals, measurement can pertain to any of the six engagement drivers and, therefore, to overall engagement. Simply put, measurement is how we evaluate our progress against goals.



Control is where governance gets interesting. Control is about the decisions we make to adjust course based on either qualitative or quantitative measurements. It can come from conscious decision-making (hiring more carpenters to get back on schedule when framing a house) or from unconscious adjustments (turning the steering wheel slightly to stay in your lane on the highway). To help illustrate how these two levers help drive engagement, we'll explore governance at the personal, team, and organizational levels.

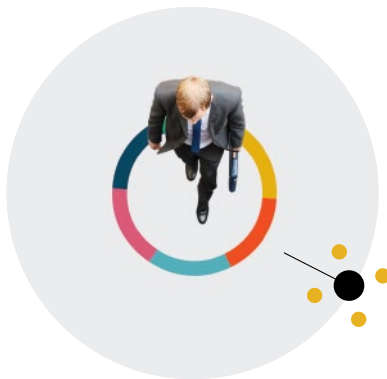
GOVERNANCE AT THE PERSONAL LEVEL

When we say someone is “out of control,” we are describing a person who is unpredictable, unproductive, and likely damaging relationships as a result of their destructive behavior. When someone is “in control,” however, they are intentional, aware of their purpose, and focused on measuring and achieving goals.

At the personal level, one of the key elements of our purpose might be to “stay healthy” and one of our goals might be to “reach our ideal weight.” Measurement might include periodically recording our weight and identifying some of the processes we’ve put in place to help us lose weight — for example, by measuring our food intake, exercise, and sleep. We might also measure our feelings of well-being daily.

Measurements on their own, however, are not helpful unless we use them. That’s where control comes in. If we see our weight creeping up, we might decide to cut back on high-calorie foods or increase our level of exercise. Control is about reflecting on what we are quantitatively measuring and qualitatively experiencing. This reflection can take the form of meditation, journaling, coaching, or even engaging in a vulnerable conversation with a friend. To make change happen, though, we need to act on those lessons learned through reflection.

When measurements fall out of line with the key alignment levers (purpose, goals, strategy, capacity, and belief), they can create friction within the organization and negatively affect the engagement drivers.



GOVERNANCE AT THE TEAM LEVEL

At the team level, we might track our progress against a project plan, measuring actual effort versus planned effort, scope, and milestone achievement. If the project involved implementing processes or technology, we might measure adoption and training effectiveness. In general, measuring any of the engagement framework implementation levers used on a project quantitatively, if possible, but qualitatively at the least, is a best practice.

To make those measurements effective, however, we need to process them and take action. Control at the team level usually happens in daily stand-ups or weekly status meetings, but this type of control is effective only if those meetings are being run well. Tracking and managing progress against action items is necessary when teams are first forming. As teams mature, less management is needed because individual discipline and governance take over and trust develops between team members; this trust strengthens relationships, ensures the fair distribution of work, and leads to more predictable individual outcomes.

GOVERNANCE AT THE ORGANIZATION LEVEL

At the organization level, metrics like profitability, product quality, process quality, customer satisfaction, employee retention, and engagement

can all help measure the health of an organization. However, measurement can become burdensome and ineffective when too many metrics are put in place and never acted upon. It's important for organizations (and individuals or teams, for that matter) to step back and reflect on whether the measurements collected align with their purpose, strategy, and goals.

When measurements fall out of line with the key alignment levers (purpose, goals, strategy, capacity, and belief), they can create friction within the organization and negatively affect the engagement drivers. In a worst-case scenario, they can even drive unethical behavior and create risks to the organization.

Control at the organization level usually happens in a cascaded structure of leadership meetings, with governance reviews on a monthly, quarterly, or annual basis at the departmental, divisional, executive, and board levels. And for good governance to be effective, leaders must engage in goal setting, measurement against goals, prioritization of the initiatives to improve performance, and resource allocation.

Governance is critical at this level because it keeps the organization honest, ensuring that it is living its purpose and driving engagement throughout the broader ecosystem where it operates. 🌈

WRAP-UP:

We've now covered every driver of engagement and every lever that exists to influence those drivers of engagement. Based on Jabian's extensive research and testing, we are confident that this is a complete and comprehensive framework.

That doesn't mean our framework is never challenged. On the contrary, two areas are questioned most often: trust and leadership. "Isn't trust critical to engagement?" people ask. Like other virtues not directly covered by one of the six engagement drivers (growth, relationships, autonomy, security, fairness, or well-being), trust is made up of a collection of engagement drivers. I trust you if we have a relationship, I have some certainty about how you will behave toward me, and I know that you treat me fairly. When those factors are true, you probably also care about my personal growth and well-being. Like molecules are made up of atoms, trust is made up of a combination of elemental engagement drivers.

The second question that's often raised involves leadership. Isn't leadership critical for engagement? How can I have engagement if I don't have a solid leader? Of course, good leadership is critical. But what is leadership? Effective leadership is the use of the levers on the outside of the framework to influence the drivers that make up engagement. The levers represent a complete collection of tools available to leaders to drive their organizations. The levers influence the drivers, and the drivers influence engagement. From the inside out, it's an engagement framework. From the outside in, it's a leadership framework.

THIS FRAMEWORK HAS BECOME OUR “SWISS ARMY KNIFE” FOR
DIAGNOSING PROBLEMS AND IDENTIFYING SOLUTIONS. WE HOPE THAT
YOU WILL FIND IT AS USEFUL AS WE HAVE FOR CREATING AN ENGAGING
WORKPLACE, ENHANCING CULTURES, LEADING ORGANIZATIONAL CHANGE,
TUNING TEAM DYNAMICS, COACHING AND MENTORING INDIVIDUALS, AND
EVEN FIGURING OUT HOW TO GET YOURSELF OUT OF A FUNK.

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