Introduction

• Each of the core engagement survey items tends to have 3-4 underlying, root cause issues that contribute to having low or flat scores on that item.
  ➢ *Those issues are listed on Slides 4 and 5 of this document.*

• Teams can go through the list for each item and see which root cause issue(s) applies most to them – and then develop their action plan accordingly.
  ➢ *A list of potential action steps for each root cause issue is listed on Slides 7-21 of this document.*

• The lists are not meant to be exhaustive. Teams can always identify issues and action steps that are not referenced in this document.
Local vs. Systemic Action

• Each of the action steps listed in this document should be within the team’s control.

• There may be aspects of each root cause issue that remain beyond the team’s control – and those should be escalated to leadership through appropriate channels.

• But that shouldn’t stop the team from doing what they can at the local level to improve the situation (or at least minimize the impact of the problem on engagement and performance).
# Root Cause Issues for Each Item

<table>
<thead>
<tr>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
<th>Q5</th>
<th>Q6</th>
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<tbody>
<tr>
<td>I know what’s expected of me at work.</td>
<td>I have the materials and equipment I need to do my job right.</td>
<td>At work, I have the opportunity to do what I do best every day.</td>
<td>In the last seven days, I have received recognition or praise for doing good work.</td>
<td>My supervisor, or someone at work, seems to care about me as a person.</td>
<td>There is someone at work who encourages my development.</td>
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**Q1**
- We’re not clear on, or we don’t like, the direction the organization is headed.
- We’re not clear on our day-to-day responsibilities.
- We receive multiple or conflicting instructions from different managers.
- We get hired to do one thing, but get another.

**Q2**
- We lack the necessary tools and materials to do the job.
- The purchasing processes are slow or inefficient.
- We fail to get the information we need from leaders and managers.
- We feel overworked and understaffed.

**Q3**
- There’s been a lot of change; it’s not the same job/company anymore.
- A lot of processes are becoming centralized or standardized; we have less control then before.
- There are a lot of barriers to performance.
- We have to perform too many non-essential/administrative tasks.

**Q4**
- We fail to receive sufficient respect or acknowledgment for what we do; the recognition doesn’t feel genuine.
- We only hear about the things we do wrong.
- Our formal recognition programs are flawed; the same people always get recognized.

**Q5**
- Managers aren’t visible enough; they don’t relate to what we’re going through.
- Leaders aren’t visible enough; they don’t relate to what we’re going through.
- We don’t do enough for one another as people.

**Q6**
- There are no clear growth or career plans for our role.
- Managers could be doing more to support our day-to-day progress and development.
- Our orientation/onboarding programs are insufficient or ineffective – so newer employees feel ill-equipped for the role.
Root Cause Issues for Each Item (contd.)

<table>
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<tr>
<th>Q7</th>
<th>Q8</th>
<th>Q9</th>
<th>Q10</th>
<th>Q11</th>
<th>Q12</th>
</tr>
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<tbody>
<tr>
<td>At work, my opinions seem to count</td>
<td>The mission or purpose of my organization makes me feel my job is important.</td>
<td>My associates or fellow employees are committed to doing quality work.</td>
<td>I have a best friend at work.</td>
<td>In the last six months, someone at work has talked to me about my progress.</td>
<td>This last year, I have had opportunities at work to learn and grow.</td>
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We don’t feel like we have an opportunity to voice our opinion. Our comments are rarely acknowledged or acted upon by leaders and managers.

There is a fear of retaliation for speaking out.

- The mission of the organization aren’t clear.
- Actions taken by leaders and managers seem to be in conflict with the mission.
- We understand the mission, but it seems to have little to do with us.
- We don’t feel like we’re recognized for our contribution to the mission.
- People within the department aren’t held accountable for their performance.
- Other roles/departments aren’t carrying their weight.
- Certain roles/departments are clearly “favored” over others.
- People don’t really know one another; there aren’t enough opportunities to interact (during and after work).
- We’re not very good about thanking or recognizing one another.
- There isn’t a lot of trust across units and departments.
- Reviews are constantly late; some people never get reviews.
- The review process seems arbitrary or ineffective.
- Strong performance isn’t rewarded – i.e., everyone gets the same raises, promotions aren’t merit based.
- There is little day-to-day feedback on performance.
- There aren’t enough learning and development opportunities for staff.
- It is difficult for us to attend the learning and development programs that are offered.
- Training and other learning and development programs don’t help you advance within the company.
Potential Action Steps for Each Item
# I know what is expected of me at work

<table>
<thead>
<tr>
<th>Likely root cause issues for low scores</th>
<th>Potential action steps:</th>
</tr>
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</table>
| We’re not clear on, or we don’t like, the direction the organization is headed. | 1. Reach out to leaders for additional information.  
2. Have the team define how they best think they can contribute to the overall success of the organization.  
3. Set specific goals/milestones for the year based on the team’s definition from #2.  
4. Identify one short term opportunity for improvement in performance needed to support the team’s goals. |
| We’re not clear on our day-to-day responsibilities. | 1. Review individual job descriptions and update/revise as necessary.  
2. Identify and discuss key areas of confusion regarding job responsibilities or performance. Reach out to other departments if there are concerns regarding potentially redundant or conflicting functions.  
3. Ensure that there are clear standards for performance and those standards are understood by team members.  
4. Have the manager provide more consistent feedback to team members regarding their performance. |
| We receive multiple or conflicting instructions from different managers. | 1. Establish a clear chain of command for team members.  
2. Create processes to quickly address conflicts as they arise.  
3. Schedule quarterly meetings between unit/department and functional managers to address recurring problems or conflicts.  
4. Ensure that responsibilities for “people management” are clear among managers. |
| We get hired to do one thing, but get recognized/rewarded or another. | 1. Review individual job descriptions and update/revise as necessary.  
2. Establish and commit to guidelines for evaluations/reviews.  
3. Build individual goals into the performance review process. Continually assess progress against those goals throughout the year.  
4. Use team meetings to highlight best practice behaviors and performance throughout the year. |
I have the materials and equipment I need to do my job right

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| We lack the necessary tools and materials to do the job. | 1. Ensure that team members know where materials are and how to access them. Identify any opportunities for improvement regarding inventory, storage and retrieval. Include other units/departments in the discussion as needed.  
2. Keep a running and visible list of materials that need to be purchased or replenished. Allow anyone on the team to add items to the list.  
3. Have meaningful discussions around the cost of materials and equipment – both to minimize waste and to better understand why certain larger purchases may take longer.  
4. Discuss alternatives/workarounds around areas and tasks where materials aren’t available or can’t be replenished. |
| The purchasing processes are slow or inefficient. | 1. Walk through the purchasing processes. Review protocols, timelines, and points of contact.  
2. Keep track of pending purchases and make that information available to the team.  
3. Establish an alert system to highlight outstanding purchases so the manager/team can follow up on the request.  
4. Suggest one additional change to improve the purchasing process or to improve communication with the purchasing department/team. |
| We fail to get the information we need from leaders and managers. | 1. Define the different types of information people on the team need most. Ask for volunteers to help sift through the information that comes via town halls, e-mails, bulletins, etc.  
2. Establish norms for team communication – e.g., how frequently people like to receive information, the best media or formats.  
3. Set very clear expectations for staff meetings and huddles. Ensure that there is time set aside for questions and comments.  
4. Have the managers use a “stop light” or other mechanism to track their responses to team members’ questions or comments. [Typically - green means the question has been answered or the issue has been resolved; yellow means the responses or solution is pending; red means the issue can’t be addressed or the answer is no.] |
I have the materials and equipment I need to do my job right (contd.)

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| We feel overworked and understaffed.   | 1. Invite someone from leadership to discuss the state of the industry and the trade-offs that can require. Leave time for questions and comments.  
2. Identify 1-2 processes or tasks that can be streamlined or eliminated to reduce the team’s workload. Involve other units/departments in the discussion where required (particularly where there are opportunities around the hand-offs between functions).  
3. Discuss ways to increase flexibility around scheduling.  
4. Continually reinforce the mission of the organization. Share best practice or success stories related to customer service/patient care in staff meetings and huddles. |
At work, I have the opportunity to do what I do best every day

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<th>Likely root cause of low scores</th>
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| There’s been a lot of change; it’s not the same job/company anymore. | 1. Review some of the recent changes. Differentiate between perception and reality.  
2. Commit to addressing future rumors in staff meetings and huddles (before “urban legends” can take hold in the group).  
3. Speak to what hasn’t changed about the unit/function.  
4. Continually reinforce the mission of the organization and the standards of the unit/function. Share best practice or success stories in staff meetings and huddles. |
| A lot of processes are becoming centralized or standardized; we have less control than before. | 1. Ensure that people understand the new processes. Seek out information on the likely benefits to the organization and workgroup.  
2. Acknowledge that things could actually be more difficult, and workload could actually increase, during the introduction of a new process or technology.  
3. Keep a record of specific issues or challenges, so they can be escalated to leadership or the implementation team.  
4. Create/maintain a sense of control within the workgroup.  
   • Define the behaviors and attributes that make the unit/function/location special.  
   • Speak to how those behaviors and attitudes won’t be impacted by centralization and standardization.  
   • Identify opportunities to further “customize” the work environment (through décor, activities, etc.). |
| Here are a lot of barriers to performance. | 1. Narrow the field. Focus on 1-2 areas where the team is in a position to create change.  
2. Review previous situations in which the team has had success addressing problems. Identify the key factors that led to the team’s success and try to re-create those factors the current situation.  
3. Reach out to other units/departments that the team thinks may be impacted by the same set of problems. Work on a joint solution.  
4. Acknowledge issues related to staffing/workload and pay/benefits. But recognize that they can’t necessarily be addressed through this process and shouldn’t prevent the team from working on other challenges. |
At work, I have the opportunity to do what I do best every day (contd.)

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| We have to perform too many non-essential/administrative tasks. | 1. Identify and review what’s most important to the workgroup in terms of their performance – e.g., their goals, metrics, milestones.  
2. Identify tasks or processes that seem to have little bearing on those goals, metrics and milestones.  
3. Have managers and select team members track the amount of time they spend on those tasks and processes over a 2 week period. Use to identify areas where the team is losing the most time.  
4. Takes steps to streamline/eliminate the wasteful tasks and processes. Solicit help from the organization’s continuous improvement or six sigma teams, where possible. |
In the last seven days, I have received recognition or praise for doing good work

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| We fail to receive sufficient respect or acknowledgment for what we do; the recognition doesn’t feel genuine. | 1. Discuss the concept of recognition. Establish what it would take for employees to feel recognized and respected in their roles.  
2. Have the manager meet individually with team members to determine how they like to be recognized (so that the recognition feels more genuine and personal). For large groups, consider other ways for team members to make their preferences known.  
3. Remind team members that recognition can also come from co-workers.  
4. Create a recognition board for co-workers and patients/patient families to post comments. |
| We only hear about the things we do wrong. | 1. Provide for a greater amount of on-the-spot recognition.  
2. Set clear standards for performance so people aren’t unduly criticized. At the same time, commit (as a team) to holding people accountable to those standards so they carry some weight in the unit/department.  
3. Encourage peer-to-peer feedback to help guide performance (so the feedback – good or bad – isn’t always coming from leaders or managers). Provide tips and guidelines to team members to ensure that all feedback given is respectful and constructive.  
4. Highlight best practices (or other positive feedback received by employees) in staff meetings and huddles. |
| Our formal recognition programs are flawed; the same people always get recognized. | 1. Discuss what the formal recognition programs mean to the team and whether winning is important to team members.  
2. If yes, then ensure that team members are familiar with all of the rules and deadlines for submissions.  
3. Highlight and celebrate any wins within the group.  
4. Identify what it might take for individual team members or the department as a whole to be recognized more often. |
### My supervisor, or someone at work, seems to care about me as a person

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| Managers aren’t visible enough; they don’t relate to what we’re going through. | 1. Have the manager outline their “people management” responsibilities and make specific commitments to the team – regarding communication, evaluations, etc.  
2. Establish dedicated “floor time” for the manager, where possible.  
3. Set very clear expectations for staff meetings and huddles. Ensure that there is time set aside for questions and comments. |
| Leaders aren’t visible enough; they don’t relate to what we’re going through. | 1. Ensure the team has a full understanding of the employee rounding process (where applicable).  
2. Establish a mechanism for escalating issues to mid-level or senior leaders outside of the rounding process. Note this has to be more than a venting exercise for managers and staff. For best results, the team has to give some thought to a solution, by attempting to answer the following questions:  
  - What are some reasonable actions that leaders could take around the issue?  
  - What, if anything, can we do to better equip leaders to address the issue?  
  - What are our best alternatives if the answer from leadership is ‘no’?  
3. Invite leaders to meet with the team in less formal settings – e.g., breakfasts, lunches. |
| We don’t do enough for one another as people. | 1. Create profiles of team members. List birthdays, anniversaries, special interests. Dedicate time in staff meetings and huddles for recognizing personal achievements and milestones.  
2. Plan and promote social events and other team building activities.  
3. Encourage team members to recognize one another (in huddles, staff meetings, or otherwise) for their effort and support.  
4. Have the manager commit to an “open door” policy and dedicate specific times during the week for office hours. Allow and encourage employees to speak to both personal and professional challenges. |
There is someone at work who encourages my development

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| There are no clear growth or career plans for our role. | 1. Use the evaluation process as a means for employees to set personal and professional goals. Think both short and long term.  
2. Ensure that all team members are familiar with the processes and criteria for advancement/promotions (including how and where new job opportunities are posted).  
3. Work with other departments to schedule “learn at lunches” or other opportunities for employees to further their growth and development – both inside and outside of their roles.  
4. Encourage team members to play teaching roles where they feel like they have something to offer. |
| Managers could be doing more to support our day-to-day progress and development. | 1. Have the manager provide consistent feedback on performance and progress against goals.  
2. Have the manager seek out and identify high potential candidates for advancement and provide them with tailored opportunities for growth – e.g., special tasks or team/committee assignments, job shadowing.  
3. Have the manager commit to an “open door” policy and dedicate specific times during the week for office hours. Allow and encourage employees to speak to both personal and professional challenges.  
4. Schedule multiple discussions/training sessions or use office hours to support the introduction of new processes or technologies. Keep a record of specific issues or challenges, so they can be escalated to leadership or the implementation team. |
| Our orientation/onboarding programs are insufficient or ineffective – so newer employees feel ill-equipped | 1. Work with Human Resources to schedule 30-60-90 day reviews with new employees. Review key messaging from orientation and compare to the employees’ experience on the ground.  
2. Draft an FAQ document for the group/department, answering questions that are unlikely to be answered in orientation/onboarding.  
3. Create a structured mentorship program for the group/department, pairing new and tenured employees.  
   • Establish guidelines for mentors and hold them accountable to their roles.  
   • Find ways to recognize/reward successful mentors, to encourage ongoing participation. |
At work, my opinions seem to count

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| We don’t feel like we have an opportunity to voice our opinion. | 1. Build an interactive component into all staff meetings and huddles.  
2. Have the manager proactively solicit questions and comments after major announcements or changes to process/technology.  
   • Ensure that team members fully understand all major announcement and changes – so they are basing their concerns/objections on fact and not perception or rumor.  
   • Invite leaders to meet with the team to provide further information on announcements and changes (or to field other questions or comments).  
3. Establish a mechanism for escalating issues to mid-level or senior leaders outside of any team member rounding process (or allowing team members to take their ideas directly to leaders).  
4. Create 1-2 dedicated team member teams. Ensure they have very specific charters and deliverables. |

| Our comments are rarely acknowledged or acted upon by leaders and managers. | 1. Have the managers use a “stop light” or other mechanism to track their responses to team members’ questions or comments (including those that have been escalated to leadership).  
2. Set timelines for managers to follow up with leaders on issues that have been escalated.  
3. Keep (and prominently display) a running list of changes that have been made or resources that have been acquired based on team member input.  
4. Highlight the best/most impactful comments or ideas from team members in staff meetings – on a monthly or quarterly basis. |

| There is a fear of retaliation for speaking out. | 1. Establish processes for questions and comments to be submitted anonymously.  
2. Remind team members of the processes for reporting acts of retaliation or reprisal.  
3. Take some of the fear out of the process by celebrating success stories.  [See action items 3 and 4 in the section above.] |
The mission or purpose of my organization makes me feel my job is important

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| The mission of the organization isn’t clear. | 1. Reach out to leaders for additional information on the mission/vision.  
2. Discuss what brought people to the organization in the first place.  
3. Identify the “greater good” that the organization is trying to deliver on. Share best practice examples. |
| Actions taken by leaders and managers seem to be in conflict with the mission. | 1. Meet after town halls or major announcements by leadership. Discuss why certain decisions might have been made by leaders.  
2. Look to differentiate between rumor/perception and reality.  
3. Invite leaders to meet with the team to discuss recent decisions or to provide further information on the business/industry/functions.  
4. Highlight what’s not going to change for the workgroup – the team’s dedication to customers/patients/co-workers, a focus on quality. |
| We understand the mission and vision, but it seems to have little to do with us. | 1. Have the team develop its own “mission statement”.  
   • What are we here to do?  
   • What is most important to us?  
2. Establish a set of standards and values for the team (or reference the organization’s existing set of standards and values).  
3. Highlight one standard or value at each staff meeting/huddle and share best practice examples. |
My associates or fellow employees are committed to doing quality work

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| People within the department aren’t held accountable for their performance. | 1. Ensure that there are clear standards for behavior/performance.  
2. Define specific actions that will be taken to recognize good behavior/performance and address poor behavior/performance.  
3. Discuss options to differentiate good and bad performance in situations where raises/promotions are limited or unavailable.  
4. Continue to share/celebrate best practices in staff meetings and huddles. |
| Other roles/departments aren’t carrying their weight. | 1. Ensure that there are clear divisions of responsibilities between roles.  
2. Eliminate any issues related to poor communication or lack of understanding between units and departments.  
3. Meet with other units and departments to better understand their timelines and processes and to help them to better understand the team’s timelines and processes.  
4. Identify for opportunities to streamline/optimize handoffs between units and departments. |
| Certain roles or departments are clearly “favored” over others. | 1. Discuss why the team thinks that is the case. Look to differentiate rumor/perception and reality.  
2. Schedule meetings or lunches with other units and departments to identify common issues and concerns. [*Note: In many instances, team members feel like they are the only ones struggling with a particular issue or being treated in a particular way. A brief conversation with colleagues in other areas of the company can quickly establish that is not the case.*]  
3. Form teams or committees with other units and departments to address common issues and concerns.  
4. Have the manager escalate issues or situations where there is differential treatment across units or departments. |
I have a best friend at work

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| We don’t really know one another; there aren’t enough opportunities to interact (during and after work). | 1. Create profiles of team members. List birthdays, anniversaries, special interests.  
2. Dedicate time in staff meetings and huddles for recognizing personal achievements and milestones.  
3. Plan and promote social events and other team building activities.  
4. Create a broader sense of community in the workplace itself. Post personal items and photos, where appropriate. |
| We’re not very good about thanking or recognizing one another. | 1. Outline the different handoffs and touch points in the workplace – so people can see how they impact and are impacted by others.  
2. Have team members offer thanks and other testimonials to co-workers in staff meetings and huddles.  
3. Create a recognition board for co-workers to post additional comments.  
4. Encourage more formal peer-to-peer recognition. Ensure that team members are familiar with all of the rules and deadlines for submissions to the company’s formal recognition programs. |
| There isn’t a lot of trust across units and departments. | 1. Schedule “meet and greets” with other units and departments.  
2. Include other units and departments in celebrations (particularly where they’ve contributed to the outcomes). Have the other units and departments commit to doing the same.  
3. Identify units and departments with which the team has the most interaction. Establish some “do’s and don’ts” to guide behavior and ensure that employees are treating each other with courtesy and respect. |
In the last six months, someone at work has talked to me about my progress.

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| Reviews are constantly late; some people never get reviews. | 1. Have the manager commit to specific dates for reviews/evaluations. Post the schedule and make that available to all team members.  
2. Allow for a broader range of people (assistant managers, supervisors, etc.) to conduct reviews/evaluations in larger departments.   
   • Ensure that the evaluators have worked with the people they’ll be evaluating.  
   • Have the evaluators meet to calibrate their scoring before the evaluations are actually delivered to staff.  
3. Create an alert system for reviews/evaluations and allow employees to reach out directly to more senior leadership when reviews/evaluations are more than 30 days overdue. |
| The review process seems arbitrary or ineffective. | 1. Ensure that all employees are familiar with the review/evaluation process and scoring system. Review during the staff meetings or huddles heading into the review/evaluation cycle.  
2. Commit to making reviews/evaluations more of a “teaching moment” for employees.   
   • Highlight key strengths and opportunities; while focusing on specific goals for the coming year.  
   • Point to activities/training programs available to the employee to build out their skills and experience.  
3. Provide the review/evaluation to employees in advance, where possible – so they can come prepared with questions or comments. |
| Strong performance isn't rewarded – i.e., everyone gets the same raises, promotions aren't | 1. Acknowledge the issue, while continuing to highlight the importance of reviews/evaluations as a learning and development tool.  
2. Establish other (non-financial) mechanisms for rewarding strong performance and meeting personal goals.  
3. Highlight best practice performance in staff meetings and huddles. |
In the last six months, someone at work has talked to me about my progress (contd.)

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<tbody>
<tr>
<td>There is little day-to-day feedback on performance.</td>
<td>1. Place greater emphasis around on-the-spot recognition and feedback.</td>
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<td>2. Encourage peer-to-peer feedback to help guide performance. Provide tips and guidelines to team members to ensure that all feedback given is respectful and constructive.</td>
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<td>3. Use staff meetings and huddles to review expectations and to call out examples of good and bad performance (again, following the guidelines on how to make feedback respectful and constructive).</td>
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<td>4. Use gift cards or other mechanisms to reward exceptional effort and performance (where budgets allow).</td>
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<td>5. Schedule quarterly or semi-annual progress updates with employees in advance of the formal reviews/evaluations. Explore alternatives for larger departments. [Note: One option in larger departments is to have employees complete their own progress reports and then meet with their manager/supervisor only when that manager/supervisor disagrees with the employee’s assessment.]</td>
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This last year, I have had opportunities at work to learn and grow.

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<tr>
<td>Issues for low</td>
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<td>1. Ensure that staff is aware of existing training/learning and development programs.</td>
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<td>• Review communication processes around training/learning and development programs.</td>
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<td>• Remind team members of upcoming events staff meetings and huddles.</td>
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<td>• Make specific recommendations, where appropriate, for individual team members.</td>
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<td>2. Organize/schedule “learn at lunches” or other learning opportunities outside the formal training/learning and development process.</td>
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<td>3. Recommend books/articles for team members to read and discuss in staff meetings and huddles. [Note: This may be more appropriate for certain roles than others.]</td>
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<td>It is difficult for us to attend the learning and development programs that are offered.</td>
<td>1. Ensure that team members are receiving sufficient advance notice for training/learning and development events.</td>
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<td>2. Organize schedules around training/learning and development activities, where possible.</td>
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<td>3. Give top priority to stronger performers as a reward for their performance. [See recommendations regarding the ‘Progress’ item.]</td>
</tr>
<tr>
<td>Training and other learning and development programs don’t help you advance within the company.</td>
<td>1. Ensure that all team members are familiar with the processes and criteria for advancement/promotions (including how and where new job opportunities are posted).</td>
</tr>
<tr>
<td></td>
<td>2. Review situations where the company seems to have deviated from those processes.</td>
</tr>
<tr>
<td></td>
<td>• Look to differentiate between perception and reality.</td>
</tr>
<tr>
<td></td>
<td>• Escalate any remaining issues/concerns to leadership.</td>
</tr>
<tr>
<td></td>
<td>3. Set up separate “tracks” for high-potential candidates that includes learning/training and development activities, job shadowing, etc.</td>
</tr>
<tr>
<td></td>
<td>4. Highlight and celebrate success stories within the unit/department, where people have advanced in their roles or been promoted.</td>
</tr>
</tbody>
</table>
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