

CHECKpoint

A Morale and Motivation Pulse of:

Sample Inc

30-Jun-2004

CHECKpoint 2

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ABOUT YOUR PULSE

The Survey

CHECKpoint is a morale and motivation survey that very quickly provides a pulse reading of the organisation's health. The questionnaire is designed so that respondents can complete it quickly and yet it also gives the organisation meaningful data.

There are four categories CHECKpoint investigates: Motivating Factors, Satisfying Factors, Leadership and Customer Focus – a total of 25 questions.

1. **Motivating** factors: those things within the organization that really make people want to come to work each day
2. **Satisfying** factors: keep people happy and satisfied at work
3. **Leadership** factors: are all about establishing an environment where people feel they belong, they know where they are going and they have a real sense of loyalty to the organisation
4. **Customer Focus** factors: are about creating a work environment that fosters good service

Scoring

Your Pulse results are presented in two formats:

Agreement Score: direct results from the first scale in the questionnaire where participants were asked the degree to which they agreed with each statement

Weighted Score: the combination of Agreement x Importance for each statement, some statements may have a high Agreement score but rate low in terms of Importance, others are High in Agreement and Importance so should 'factor' higher in your analysis

The Results

Each of the 25 questions has a seven point Agreement rating scale ranging from Agree Completely to Disagree Completely. People are also asked to rate each of the 25 items on how Important that item is to them, on a seven point rating scale ranging from Very High to Very Low. This is one of the real strengths of CHECKpoint because not only does it show what items people are rating either highly or lowly, it also identifies which items people really care about. It therefore provides the organisation with an immediate focus on where best to spend its energy.

Note: Keep in mind that this questionnaire has taken a 'snapshot' of the organisation's health in each category – the results are therefore indicative only and should be clarified through focus groups, interviews or other means of observing and identifying the trends.

What to do with the Results

The following report outlines some suggestions for maintaining or improving various aspects within each of the four categories – Motivating, Satisfying, Leadership and Customer Focus.

In general terms, the following actions are recommended:

- Distribute results of the survey immediately to all personnel who completed the questionnaire. This should not be the entire report, merely the two graphs - 'AGREEMENT SCORE THIS PULSE' and 'IMPORTANCE SCORE THIS PULSE' plus the Element Tables for each of the four categories. No explanation should accompany the distribution of results, merely a 'thank you' and a brief outline of how and by when the results will be analysed.
- Arrange for a meeting of the senior management team to discuss the report.
- Take desired action as a result of the report. Suggestions as to how to handle all results are contained in the body of the report.
- Communicate the actions decided upon to all personnel.
- Diary to follow up with a further CHECKpoint pulse – we suggest 6 to 9 months.

THE FACTORS AND ELEMENTS

1. Motivating

The Motivating Factors comprise those things within the organisation that really make people want to come to work each day. They provide people with a real sense of fulfillment from the work that they do. This is the most important of the four categories of work factors in the CHECKpoint profile (Motivating, Satisfying, Leadership and Customer Focus). Concentrating on improving or maintaining the Motivating Factors will pay off handsomely for the organisation. The Motivating Factors comprise:

- **Achievement** - gaining a real sense of accomplishment from the work that one does
- **Recognition** - being acknowledged for doing well
- **Responsibility** - being allowed to be in control of one's own work
- **Type of work** - having work that challenges and satisfies
- **Personal growth** - given training, coaching and job advancement opportunities

2. Satisfying

Whilst the Motivating factors are those that directly impact people's motivation, the Satisfying Factors keep people happy and satisfied at work. This may seem confusing at first glance. However, Satisfying Factors may best be described as 'extrinsic' – those things that apply to all people in the organisation and which can be easily identified (e.g. wages and conditions). Motivating Factors on the other hand, are intrinsic, much more difficult to define and affect individuals differently. Both the satisfiers and the motivators are important. Often, organisations get the two confused and spend a lot of time, energy and money on the Satisfying Factors (e.g. most workplace agreements focus exclusively on the Satisfying Factors) in the belief that they will motivate people. They won't! Nevertheless, they are important and if not maintained, can result in an exodus of good talent to greener pastures. The Satisfying Factors comprise:

- **Remuneration** - being paid fairly and equitably for the work that one does
- **Management** - having managers or supervisors who manage the people aspect of their role well
- **Working conditions** - enjoying the conditions and working environment

3. Leadership

Leadership is all about establishing an environment where people feel they belong, they know where they are going and they have a real sense of loyalty to the organisation. The essence of leadership is having people who when required, take a leadership role and who are dedicated to creating the conditions under which others will be inclined to follow. Whilst we have identified a number of factors in this section on Leadership within the organisation, the results must be considered in conjunction with the Motivating Factors – one affects the other. Specifically, when there is effective leadership across the organisation, the following factors are evident:

- **Understanding the environment** - whilst the senior management team would expect people within the organisation to know the long term strategic direction, at a local level people are far more concerned with the near future. It is therefore important that the organisation's long term goals and objectives translate to definite and very clear plans for at least the next 12 months at a local level.
- **Goals and direction** - people are aware (and kept aware) of all the factors that affect the organisation's success, i.e. strengths / weaknesses, state of the industry, how the organisation is performing vis-à-vis the competition and specifically how all of these factors affect them at a local level.
- **Communication/sense of team** - people work well together when they know their colleagues share the same values as them. The key person in ensuring this shared sense of team exists within the organisation, is the immediate supervisor / manager.
- **Trust and a feeling of empowerment** - people work best when they feel they have some control over their work. This aspect of leadership relates very much to the questions outlined in the section on "motivation" and can then be summed up when people talk about their organisation with family, friends and colleagues who are external to the organisation.

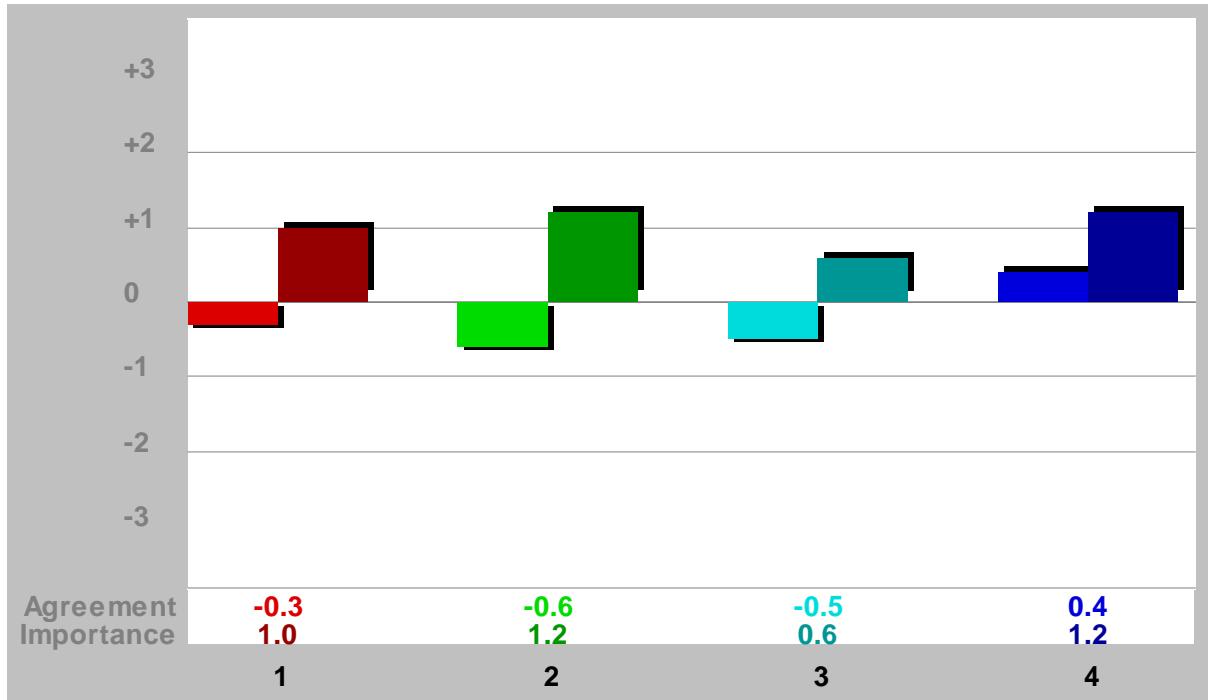
4. Customer Focus

When there is a strong customer focus within all sections of the organisation, the factors contributing to this are:

- **Teamwork** - there is a strong sense of cooperation between different teams and departments of the organisation
- **Service** - individuals at all levels take a great deal of care and pride in serving both their internal and external customers
- **Sales** - whether the organisation has a major sales focus (ie. it actually sells goods and/or services) or it is seen as purely administrative (eg. a government department), when there is a strong customer focus people see themselves as 'selling'
- **Marketing** - the organisation and the people within it, are constantly marketing themselves to their key stakeholders – ie. customers, suppliers, owners, staff, the industry and the community.

SNAPSHOT

AGREEMENT & IMPORTANCE SCORE THIS PULSE



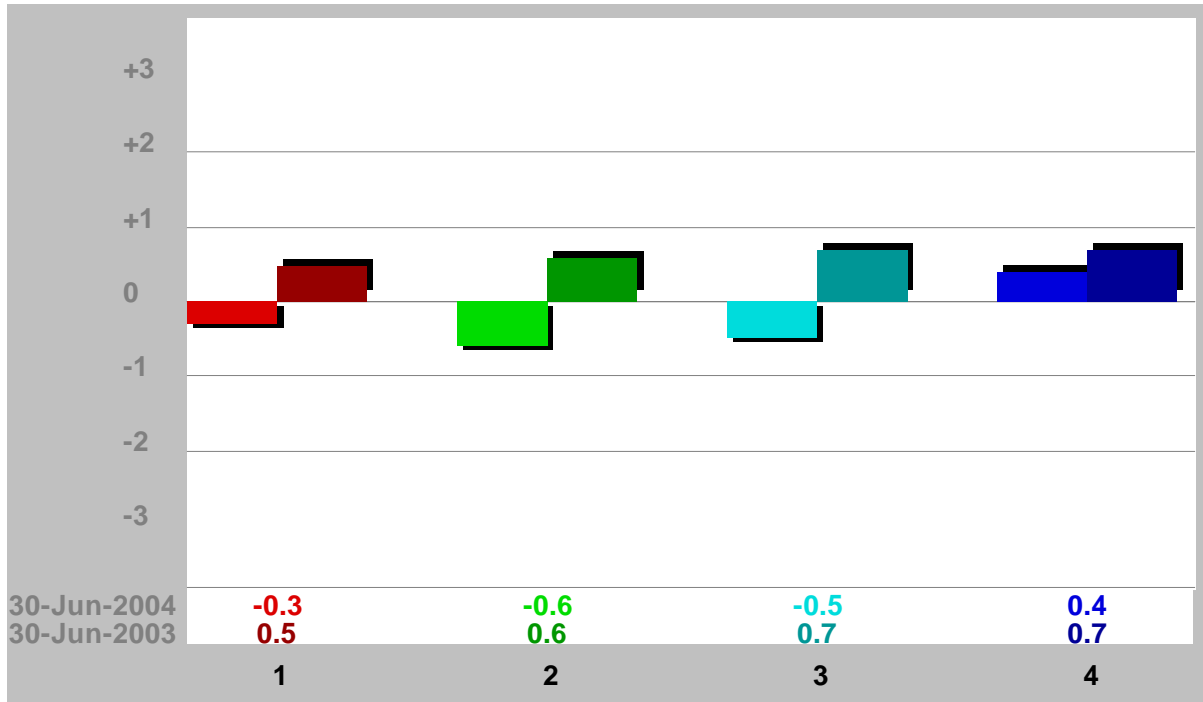
LEGEND

1. **Motivating** factors: those things within the organization that really make people want to come to work each day
2. **Satisfying** factors: keep people happy and satisfied at work
3. **Leadership** factors: are all about establishing an environment where people feel they belong, they know where they are going and they have a real sense of loyalty to the organisation
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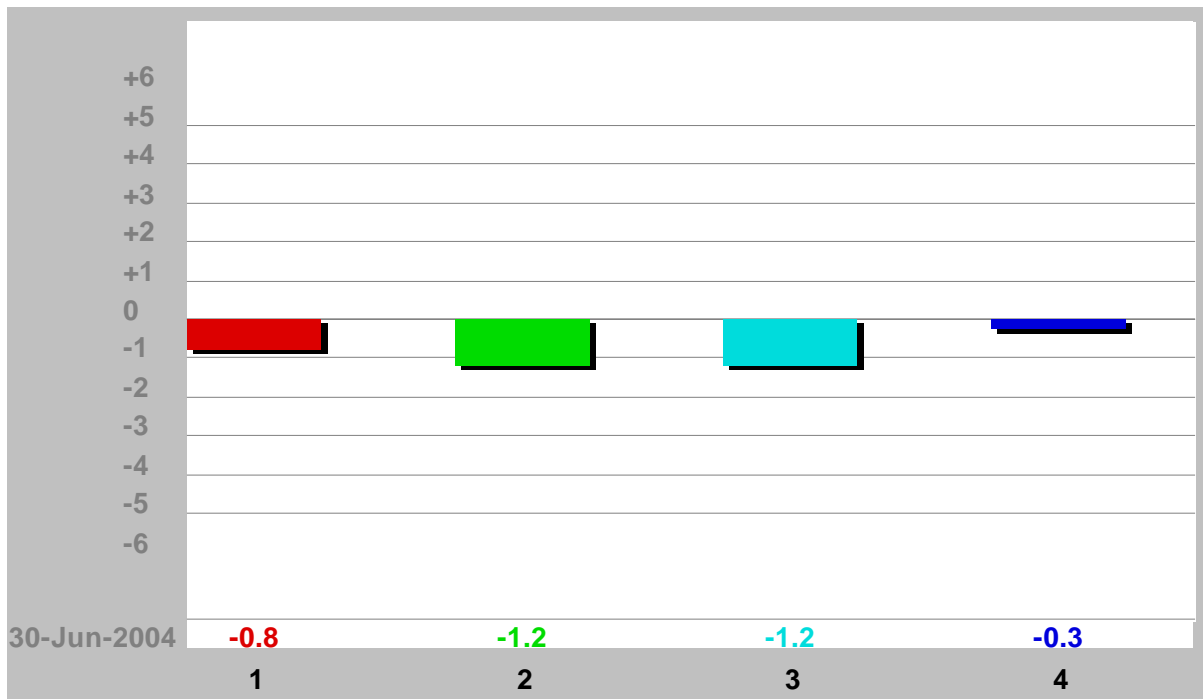
COMPARATIVE

Part 1. This Pulse compared to previous Pulse – Agreement Score

THIS PERIOD

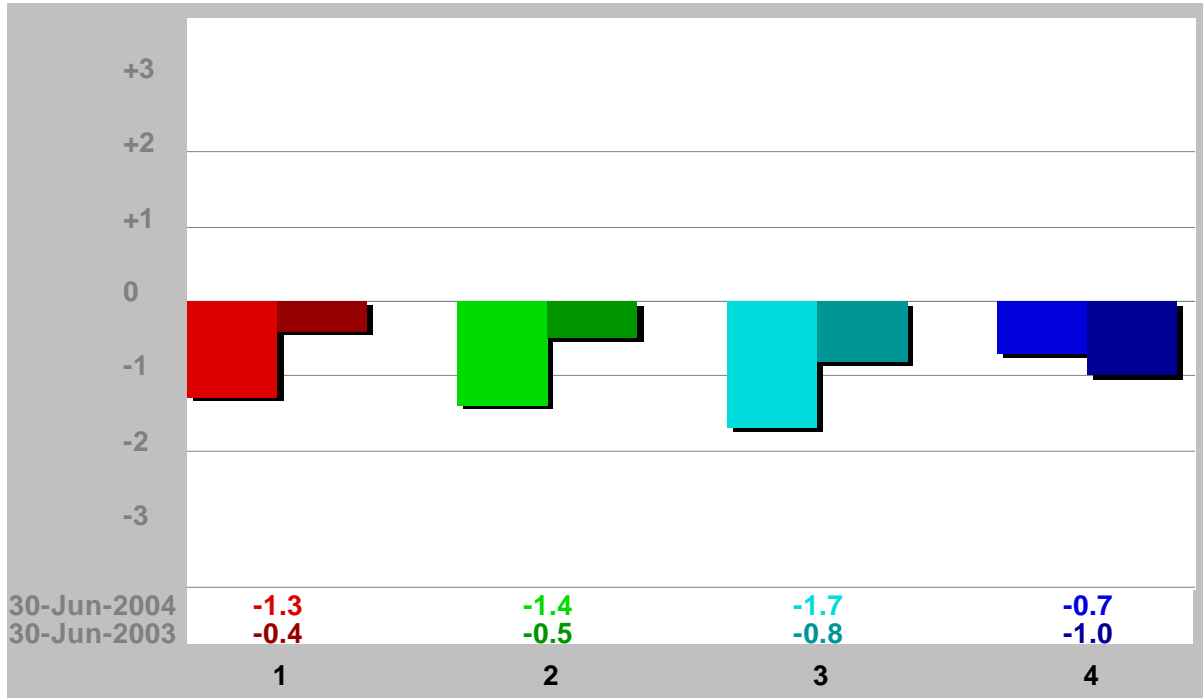


CHANGE ON LAST

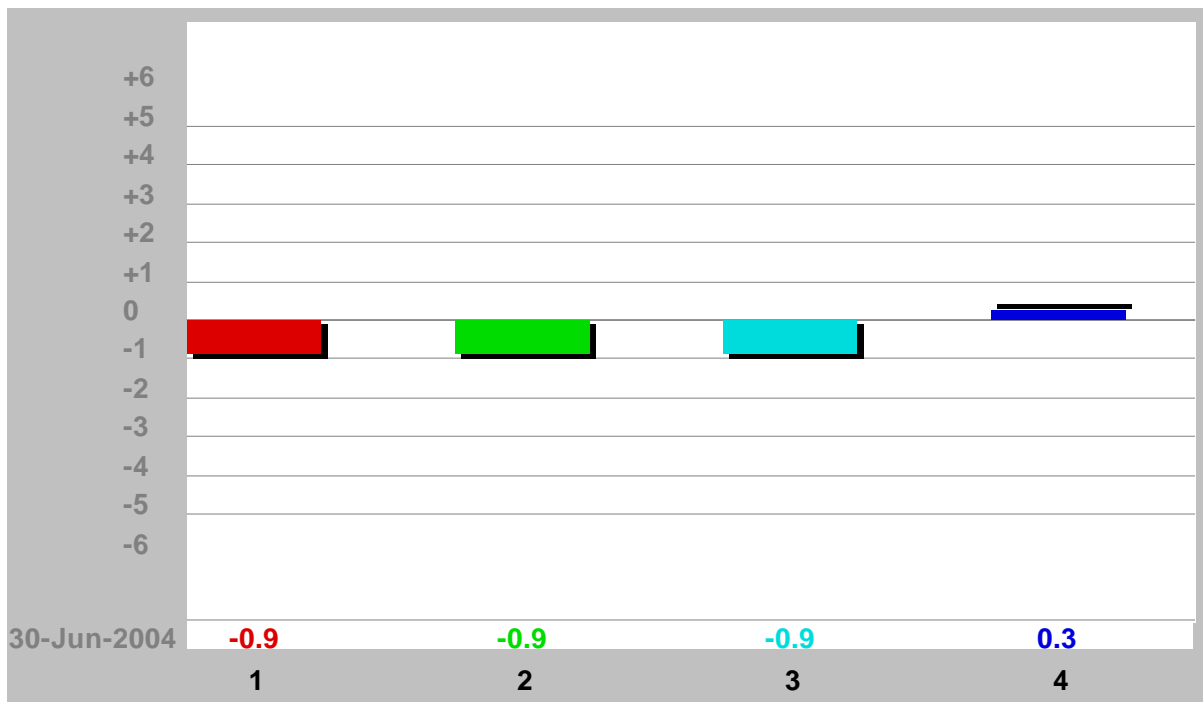


Part 2. This Pulse compared to previous Pulse – Weighted Scores (Agreement x Importance)

THIS PERIOD

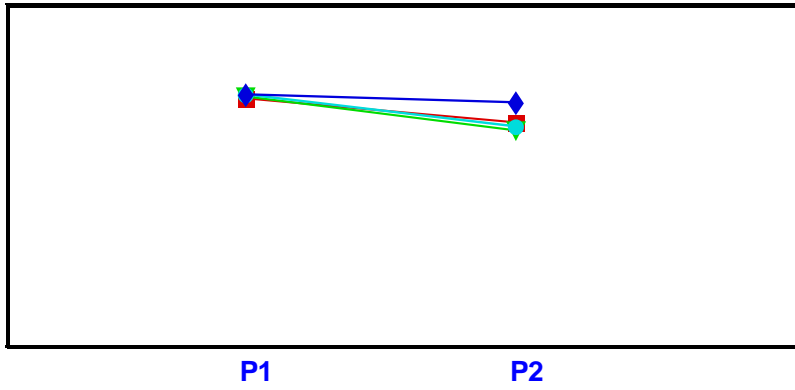


CHANGE ON LAST

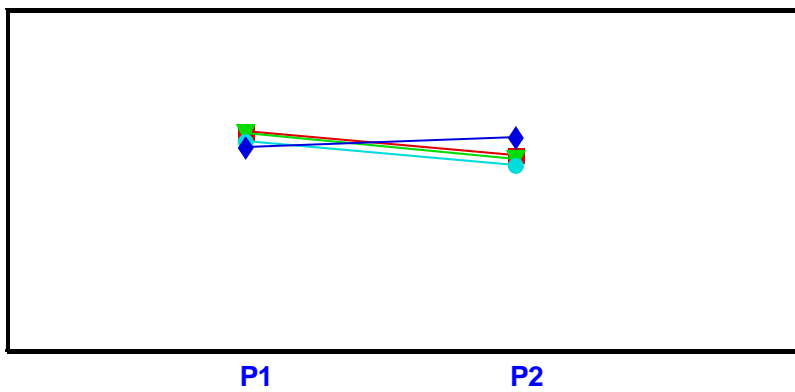


ORGANISATION PULSE

Pulse - Agreement Score



Pulse – Weighted Score (Agreement x Importance)



LEGEND

Motivating

Satisfying

Leadership

Customer Focus

P1 = 30-Jun-2003

P2 = 30-Jun-2004

RESULTS AND ACTION TO TAKE: **Motivating**

RESULT FOR FACTOR:

Agreement
0

This score presents an opportunity. Our experience suggests that the people are ready to move. Unfortunately because they are undecided, this movement is often downward. The challenge is to quickly take control and make some positive improvements in the way the organisation manages its people. Time is of the essence here.

Suggestion:

- Hold two or three focus groups. Use the results of these to implement some immediate policy changes.
- As you can probably appreciate, the Motivating Factors take time to establish. However, the one that you can do something about immediately is 'recognition for achievement'. Starting at the top, this requires an organisation-wide focus on recognising people for their achievements. Note: this does not mean Incentive Schemes, as these will have the opposite effect.

Importance
+1

Consider these in discussions and plans

RESULTS BY ELEMENT

	Agreement	Importance
Achievement	+1	+1
Recognition	0	+1
Responsibility	-1	+2
Type of work	0	+1
Personal growth	-1	+1

Note: Scale for Agreement and Importance is -3 to +3

RESULTS AND ACTION TO TAKE: **Satisfying**

NOTE: If the organisation has scored well in this category and not so well in the Motivating Factors, then it may be concentrating on the wrong issues. The result can be a very happy workplace that isn't terribly productive!

RESULT FOR FACTOR:

Agreement
-1

Anything below zero in this category indicates there is probably some issues or problems with both the HR policies and/or the way people are managed.

Suggestion:

- **Poor Remuneration:** On the surface, this could be a real problem. However, there may be other reasons, e.g. do people know how their salaries/wages compare with others in similar organisations? Communication of these facts could assist. Problems can also come about when generic salary ranges (not individual's salaries) are not public knowledge – secrecy on salary ranges for various roles causes major people problems. Salaries need to be seen as fair and equitable – if they are not 'seen' that way, then either there needs to be more communication, or the salaries need to be improved. If it is not possible to improve salaries, then you may consider improving some related benefits and packaging these as part of the salary.
- **Poor Working Conditions:** Identify some of the work environment issues that can be changed easily and quickly – do these now. Draw up a budget and priority list for more major issues. Make sure to publicise the fact that these changes have come about as a direct result of this survey.
- **Poor Supervision:** This is a challenging issue as there could be many causes – these survey results have provided the opportunity for further investigation – solutions are many and varied and must depend on the root cause of the problem. Some possible causes may be:
 - Inappropriate or poor staff selection/promotion.
 - A majority of inexperienced supervisors.
 - Lack of adequate and focused supervisory training.
 - Confused organisational structure/reporting relationships.
 - Over-emphasis on short term results at the expense of long term success.
 - If the organisation has scored poorly in the Motivating Factors, then this may have affected the result here also – look at both issues.

Importance
+1

Consider these in discussions and plans

Important Note: In our 'suggestions' for the Motivating Factors we indicated focus groups or workshops were useful tools for fostering and developing improvement strategies. Our experience suggests they are definitely NOT appropriate for the Satisfying Factors. What tends to happen when people get together to discuss ways of improving the Satisfying Factors is that the organisation ends up with a 'wish list' that keeps on growing, will never be achieved, and will only result in the Satisfying Factors becoming a major, ongoing organisational issue.

RESULTS BY ELEMENT**Agreement Importance**

Remuneration	+1	0
Management	-1	+1
Working conditions	+1	+2

Note: Scale for Agreement and Importance is -3 to +3

RESULTS AND ACTION TO TAKE: Leadership

NOTE: Leadership is very much the outputs that occur when all of the factors that affect people at work are considered. When considering the results in this section, please also relate them to other areas such as 'motivation', 'satisfaction' and 'customer focus'. For example, often the factors outlined in the 'motivation' section are the inputs that are made by people to achieve the outputs in this section on leadership.

RESULT FOR FACTOR:

Agreement
-1

Anything below zero in this category indicates there are probably some issues or problems with both the communication in the organisation and the way people are managed. It may be that there are some good leaders around the organisation (at all levels). These are the type of people who lead by example with a 'do as I do' approach rather than a 'do as I say' approach. It is important to recognise who these key people are and ensure they are recognised for the key roles they play. These people need to be encouraged as 'champions' as they will set the example for others to follow. A further major factor in these results is probably ineffective communication. Ensure that your communication is appropriate and effective and most important of all, that there is far more face-to-face communication than other through other media. It is only via face-to-face communication that people can adequately and accurately express their emotions. If you want to win the hearts (as well as the minds) of the people, then the focus must be on face-to-face communication. Sending out emails, memos, videos, brochures etc. on important leadership issues, is generally a waste of time.

Suggestion:

- Hold a meeting with the senior management team to discuss these results. This team will need to lead by example. The meeting should focus on the four Leadership Outputs - environment, direction, team values and empowerment – and how they can be inculcated into day-to-day communication throughout the organisation. The question the senior team needs to answer (and have specific strategies for) is 'If we were looking back on the organisation 12 months from now, what would we have done to demonstrate leadership? Specifically, what actions did we take to ensure that throughout the organisation there is a:
 - Shared understanding of the environment in which we operate (both at an organisational and a local level).
 - Shared understanding of the goals and direction of the organisation (once again at both a strategic and local level).
 - Shared set of team values (both as a total organisation and within each team).
 - Shared feeling of power (people need to be given responsibility to make decisions within their areas of responsibility).
- Identify who the key leaders are (at all levels of the organisation). Encourage them to openly communicate their thoughts and ideas with others. e.g. ensure they are given the opportunity to address others in all formal gatherings (meetings, conferences etc.).
- Privately (and publicly as appropriate) recognise these leaders for the good things they do. Bring their names to the attention of senior management (and other managers as appropriate) to ensure their behaviour is encouraged and rewarded.
- Check the nature and extent of the formal communication that occurs in the organisation to ensure that it relates to the four leadership outputs (environment, direction, team values and empowerment):
 - Is it reflecting the right type of message?

-1

- Is the message face-to-face as often as it should be? For effective leadership to exist, the communication within the organisation that revolves around the four leadership outputs should be 80% face-to-face and only 20% other media (e.g. written etc.).
- Make sure all managers and supervisors regularly hold meetings with their people to talk about the four leadership outputs and how these are affecting the people (both positively and negatively) at the local level.

Importance
+1

Consider these in discussions and plans

RESULTS BY ELEMENT

Agreement Importance

Understanding the environment	-0	+1
Goals and direction	-1	+2
Communication/sense of team	-1	0
Trust and a feeling of empowerment	0	+1

Note: Scale for Agreement and Importance is -3 to +3

RESULTS AND ACTION TO TAKE: Customer Focus

NOTE: Customer Focus is a culture that is developed over time within an organisation. It is very much related to the way the organisation is led and the motivation of the people. N.B: When considering the results in this section, please also relate them to other areas such as 'motivation', and 'leadership'. If the organisation has positive results in these two earlier categories, then it will be far easier to correct any poor results in 'customer focus'. If the organisation has scored poorly in the two previous categories and has also scored poorly in 'customer focus', DO NOT attempt to correct this category – your efforts will not be rewarded and may even be seen by people as 'just another exercise'. Whilst all four factors lead to total customer focus, often organisations can score quite differently (either high or low) across the four areas. For example, 'teamwork' and 'service' are definitely related and results in one are likely to affect and be similar to, results in the other. However, organisations can score quite highly in 'teamwork' and 'service', yet not score so well in 'marketing' because they do not see themselves as a marketing organisation.

RESULT FOR FACTOR:

Agreement
0

This score presents an opportunity. Our experience suggests that the people are ready to move. The challenge is to quickly take control and make some positive improvements in the way the organisation provides service.

Suggestion:

- Hold some focus groups to discuss the results and ask how these can be improved! For example, the question to ask at the focus groups could be; 'We've had some good results in the area of customer focus and there is also some room for improvement. What do we do well and how can we maintain this? What can we improve? How?'
- Ensure that the results of the focus groups are communicated to all staff. Have managers and supervisors add them to the agenda item for their next meeting with the question for local teams to answer; 'We've had some good results in the area of customer focus and there is also some room for improvement. What do we do well in this team? How can we maintain this? What can we improve? How?'
- Note: It may be tempting to think that these results can be improved with some 'customer service awards' or similar incentive/reward schemes. Our experience has been that such schemes work for some individuals, but overall do little to improve the organisations' results.

Importance
+1

Consider these in discussions and plans

RESULTS BY ELEMENT

	Agreement	Importance
Teamwork	-0	+1
Service	0	-0
Sales	+1	+2
Marketing	+1	+3

Note: Scale for Agreement and Importance is -3 to +3

DISTRIBUTION RESPONSE PATTERNS – BY QUESTION

Total Number of Respondents = 3

 Alarm Bell: Needs Immediate Attention

Question	-3	-2	-1	0	1	2	3	NA	Average Agreement	Average Importance
Q1 I get a real sense of accomplishment from the work that I do. MOTIVATING					1	1	1		2	h
Q2 The work that I do enables me to see when I have done a good job without having to rely on my supervisor/manager for feedback. MOTIVATING				2	1				0.3	m
Q3 I am sufficiently well recognised and appreciated for the work that I do. MOTIVATING			1	1	1				0	mh
Q4 I have a very clear understanding of the performance expectations of my role. MOTIVATING		2	1						-1.7	h
Q5 I have a lot of freedom to adopt my own approach to the work I do within my job. MOTIVATING		1	1	1					-1	mh
Q6 My job presents me with a challenge that fully requires me to use my skills and abilities. MOTIVATING			1	1	1				0	mh
Q7 I have been provided with ample opportunity (i.e. training/coaching) to develop further within my current role. MOTIVATING			2	1					-0.7	mh
Q8 I am able to access further training/coaching to develop into other roles should I so desire. MOTIVATING		1	2						-1.3	mh
Q9 By comparison with people in similar jobs to mine in other organisations, I believe I am well paid. SATISFYING				1	2				0.7	m
Q10 My immediate supervisor/manager's ability to manage his/her business/technical responsibilities is very good. SATISFYING		1	2						-1.3	mh
Q11 My immediate supervisor/manager's ability to manage the people management responsibilities of his/her role is very good. SATISFYING			1	2					-0.3	h
Q12 I receive sufficient feedback throughout the year from my immediate supervisor/manager. SATISFYING		1	1	1					-1	m
Q13 I am satisfied with the way my formal performance review was handled. SATISFYING	1	1	1						-2	mh
Q14 Compared to other similar organisations that I know of, I rate this organisation as a good place to work. SATISFYING				1	2				0.7	h

Alarm Bell: Needs Immediate Attention

Question	-3	-2	-1	0	1	2	3	NA	Average Agreement	Average Importance
Q15 I usually receive enough information about changes in services, products, procedures and systems in order for me to be prepared for the changes. LEADERSHIP			1	2					-0.3	mh
Q16 There is very good two-way communication between my immediate supervisor/manager and myself. LEADERSHIP			1	1	1				0	mh
Q17 I have a clear idea of the organisation's goals and direction for the coming 12 months. LEADERSHIP		1	1	1					-1	h
Q18 Overall, I believe there is a very positive attitude within the organisation. LEADERSHIP		1	1	1					-1	m
Q19 My immediate supervisor/manager sets a good example for others to follow. LEADERSHIP		1	1	1					-1	m
Q20 I am proud to tell people I work for this organisation. LEADERSHIP			1	1	1				0	mh
Q21 I have trust and confidence in my immediate supervisor/manager. LEADERSHIP			1	1	1				0	m
Q22 Co-operation between different teams/departments is very good. CUSTOMER FOCUS			1	2					-0.3	mh
Q23 Compared to other similar organisations that I know of, I believe the service provided by this organisation is very good. CUSTOMER FOCUS			1	1	1				0	m
Q24 In general, I believe this organisation is very sales oriented. CUSTOMER FOCUS				1	1	1			1	h
Q25 I believe that the organisation's marketing and advertising compares very favourably with other similar organisations. CUSTOMER FOCUS				1	1	1			1	vh

Make sure you check your Average Agreement results on the following questions which scored Very High in importance to the respondents:

Q25

COMMENTS

Question 3: I am sufficiently well recognised and appreciated for the work that I do. **MOTIVATING**

We do not receive regular feedback as to how well we are meeting our performance objectives. There have been times when I believe I have achieved highly in a task but have not received recognition for that achievement.

Question 6: My job presents me with a challenge that fully requires me to use my skills and abilities. **MOTIVATING**

I believe there could be more scope within the organisation to develop our current roles to incorporate specific skills of individuals.

Question 7: I have been provided with ample opportunity (i.e. training/coaching) to develop further within my current role. **MOTIVATING**

There have been instances when I have requested training but have been refused. Some of these training opportunities would have been invaluable to future development, but were refused more on the basis that the organisation could not afford the time away this would result in.

Question 12: I receive sufficient feedback throughout the year from my immediate supervisor/manager. **SATISFYING**

Performance Appraisal in this organisation can often be a 'once a year' activity - when we receive pay reviews. Consistent feedback throughout the year would be useful in establishing benchmarks of performance for myself and in judging my performance. Positive feedback, for a job well done would help to provide additional motivation.