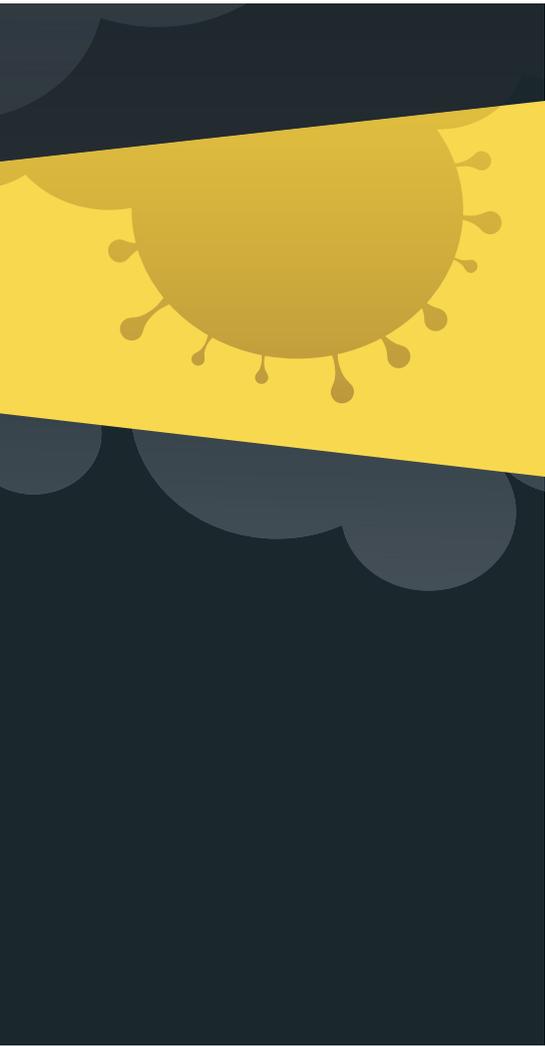




# Lighthouse in a Storm

By Bill Jagrowski and Fred Jewell

*How leaders can use the Jabian Engagement Framework to navigate through uncertainty.*



**The events of this past year threw most organizations and their leadership teams into crisis mode. Whether it was responding to COVID-19, social justice protests, political turmoil, wildfires, or hurricanes, leadership teams had to steer their organizations through successive events that resulted in either catastrophic loss or unanticipated opportunity.**

When we find ourselves in these uncertain situations, it is helpful, as a leader, to have a tool to keep us grounded and to help us evaluate the emotional impacts to our stakeholders and the levers we can pull to steady those emotions or even drive greater engagement and productivity. The Jabian Engagement Framework is a tool leaders can use to diagnose their situation and generate creative solutions to weather a crisis.

As we have seen this year, crises often affect multiple drivers of engagement simultaneously. Public health restrictions can hurt growth, relationships, our sense of security, and our well-being. Those restrictions, however, can also spur growth for the autonomous employees who now find themselves without commutes and create new opportunities through a virtual workspace. Social justice protests during the summer of 2020 highlighted fairness issues in our communities and inspired us to improve relationships. As a leader, it is important to examine the impact on each of your stakeholder groups through the lens of the six Engagement Drivers: growth, relationships, autonomy, security, fairness, and well-being. Assessing how each stakeholder emotionally experiences a crisis can help you respond with the best application of the levers.

This article will explore how each of the Engagement Levers can influence the Engagement Drivers (the pie wedges in the center of the model on page 69). Leadership is all about effectively using these levers to influence the drivers to improve overall engagement, performance, and results.

#### **CREATING ALIGNMENT UP, DOWN, AND ACROSS THE ORGANIZATION**

In a crisis, the Alignment levers provide an important anchor for decision-making. Organizations that enter an emergency aligned around purpose, strategy, goals, capacity, and a belief that they can succeed have a significant leg up on those that lack alignment when confronted with a crisis.

**PURPOSE:** A crisis will almost always cause leaders to reexamine some of the alignment levers in the context of the emergency. Organizations with a strong

purpose and well-exercised core values have an anchor for their response and will thrive. If an organization faces a crisis without first having a strong purpose and values, it is almost impossible to gain the kind of alignment necessary to motivate and inspire stakeholders to persevere. In these situations, organizations often become fragmented and disorganized, confusing their employees and their customers. To avoid those type of missteps, develop and institutionalize purpose and core values when times are good so that you are ready for the next disruption.

**STRATEGY AND GOALS:** Unless your organization specializes in crisis response, your strategy and goals will almost certainly be thrown off course. In a crisis, it is critical to reformulate your strategy and goals based on the new playing field. Strategy is about how we fulfill and live our purpose in a given context, and goals are about what we strive to achieve. Step back and reevaluate what is practical in the context of the disruption, but anchor back to purpose and core values. Communicating and implementing your crisis strategy and goals will be much easier if they are aligned with your purpose.

**CAPACITY:** At the onset of a crisis, leaders often try to address the compounding issues using the resources available in their current roles. This is a mistake. Deprioritizing work that can wait and reallocating those resources toward addressing the crisis will speed up your response and minimize overload on your workforce. For a prolonged crisis—e.g., a global pandemic—leaders will often face the difficult decision of whether to reduce headcount or ask employees to take pay cuts. Naturally, they should

make the decision keeping purpose, core values, and business need in mind. In organizations where it is time-consuming and expensive to recruit employees, for example, salary reduction is the smarter strategy and ensures a faster recovery.

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**BELIEF:** Employees need to believe that their organization will weather any storm. Without that belief, disengagement and attrition (or worse, “retirement in place”) will skyrocket. By tying crisis-related actions back to purpose and values, and then building and communicating plans to address them, leaders can inspire enhanced performance from their workforce. When people believe they are contributing to something bigger than themselves, they will go above and beyond. As a leader, you should work hard to show how your organization’s purpose contributes to your ecosystem and how the collective actions of the group will pull everyone through the crisis.

### ADAPTING YOUR IMPLEMENTATION LEVERS

Implementation levers are the tools available to support your organization’s workforce. Because these levers are where the rubber meets the road, they are the practical mechanisms leaders can use to adjust and navigate new situations.

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**PROCESS:** Processes define the step-by-step “how” behind our work. They create clarity and improve certainty about completing a task, which

improves security. To operate in a post-COVID-19 world, companies are creating new processes and adapting old ones to accommodate the impact of the virus. This includes efforts to:

- Shift attention to processes that most critically deal with revenue generation, product or service, and delivery, and cost controls.
- Adapt processes to do as much work as possible remotely.
- Establish in-person tasks that accommodate the impact and restrictions brought by COVID-19.
- Simplify and automate processes to improve staff efficiency and focus.
- Incorporate changes to other implementation levers, such as a new technology or role changes.

Given the fluidity of the COVID-19 pandemic’s effects throughout 2020, it is important to keep in mind that process change is not an all or nothing proposition. Applying an 80/20 rule where change is prioritized and occurs in waves is often the best way to quickly adapt without overreacting.

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**TECHNOLOGY:** Technology refers to the tools we use to get work done. Typically, these tools improve autonomy by eliminating tedious, repetitive, and boring tasks; freeing up time to do more interesting work; and allowing us to work where and when we want. But in a remote lockdown reality, technology was critical to allowing companies to survive. The obvious case study is web conferencing platforms like Zoom or GoToMeeting, or collaborative platforms like Slack or Microsoft

Teams, a product Microsoft called the fastest-growing business application in history. But COVID-19 also required other technology considerations, such as:

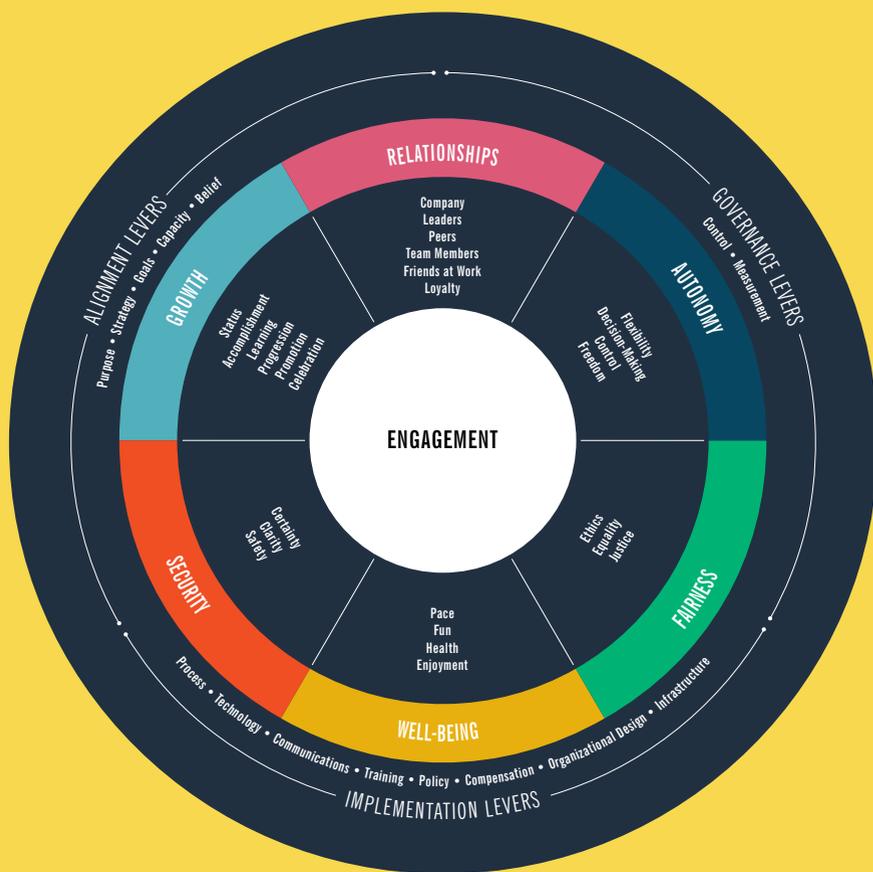
- Validating network capacity and VPN/security adequacy.
- Use of e-signature tools like DocuSign or Adobe Sign to enable remote document processing.
- Standing up or increasing use of ACH transactions to reduce reliance on physical mail for payables and receivables.
- Deployment or enhancement of a company’s e-commerce offering.
- Online ordering and delivery tools.

As with process change, the importance of prioritization relative to core business functions can allow for speed without overcompensation. But for many leaders, responses to COVID-19 provided an opportunity to adopt new tools and enable greater levels of automation.

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**COMMUNICATIONS:** Simply put, communications transmit knowledge. And without communications, we’re operating in the dark, where fear and uncertainty can drag down employees’ sense of security. Instead, communications create awareness and understanding, providing us with a heightened 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

## EMPLOYEE ENGAGEMENT FRAMEWORK



the organization. All of these truths are amplified when a generational disruption like COVID-19 occurs. In self-assessing, it is important for leaders to consider some of the basics:

- **What's going on with our audience?** COVID-19 and other current events have created anxiety and health and safety fears for many people. A recession and impending layoffs have created economic insecurity for others. Understanding the mental state of your audience ensures your communications are on topic and not tone-deaf to the mood of your people.
- **What's going on with us?** Leaders aren't immune to personal doubts or stress. While it is important to retain a positive, confident creator mindset during crises, it is also OK to be blunt and share your concerns regarding uncertainties facing your organization—just remember to

stay positive and optimistic when you do. As a leader, striking the right balance and tone in your messaging can help connect and engage people across your organization.

- **How do we communicate?** Channels like chat, video, and email have replaced face-to-face meetings during the pandemic, but they are not all suited to communicating weightier or sensitive messages. Selecting the best channel for formal sessions and informal check-ins is also important because it ensures you are reinforcing the intent of the communication instead of working against it. Finally, given that 37 percent of employees consider recognition vital<sup>1</sup>, it is important to remember the link between gratitude and engagement. Strong messaging that legitimately values and celebrates recognition,

especially during more stressful times, is an important theme on which to consistently focus.

- **When do we communicate?** COVID-19 also demands leaders think about the frequency and the transparency with which they communicate. If messaging is absent from leaders, people within an organization may invent their own stories. This is damaging under normal circumstances, but especially so during a time of heightened uncertainty. Creating a recurring schedule and keeping your people informed throughout a crisis is critical.
- **To whom do we communicate?** Crises are also an opportunity to assess how well people within the organization are connected and which audiences do — and should — receive certain information. If the organization wants leadership to be a positive and successful source of communication, then it is necessary to help them be in the know and to arm them with proper talking points and messaging. The wrong leader shrugging their shoulders and saying "Who knows?" to a key question can be devastating to the effectiveness of your communications. Outlining the frequency and agenda for leadership meetings helps to achieve that alignment.

**TRAINING:** Training builds skills, which are critical for both growth and accomplishing tasks. Without the right skills, job security takes a hit as we begin to worry about an ability to



**THE RIGHT POLICIES AND RULES CREATE A BALANCE AMONG SECURITY, FAIRNESS, AND AUTONOMY, WHICH THEN DRIVES ENGAGEMENT. DURING A CRISIS, POLICY CHANGES HELP TO SIGNAL THE IMPACT OF THE CHANGE AND CLARIFY THE ORGANIZATION'S INTENT.**

satisfy our own expectations and those of our organization. In a crisis, people are sometimes thrust into unfamiliar roles, given a field promotion, or asked to wing it. While this may lead to a positive outcome, more often than not, it layers stress and frustration atop the anxiety an individual is already feeling. This is because they may feel unqualified or that they've been pressed into a role where they lack the skills to succeed. Some other considerations around training during a crisis:

- As noted previously, a situation like COVID-19 can lead to new tools and processes. Neglecting to train your workforce in those new tools or processes, however, undermines the intent of the changes and is a recipe for failure.
- Because a crisis tends to be a fluid situation, one approach is to create basic, brief training that can be referenced ad-hoc in the future without formal instructors. While this strategy won't work in every situation, it helps leaders speed up their time to competence and enables others to quickly get up to speed.
- Training should be viewed as an opportunity to better cement process changes and the preferred/right way to do work. That can apply to new and emerging processes but also to standard work that has more variation than it should.

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**POLICY:** Because policies are the rules we live by, both personally and within an organization, they generate security. They clarify expectations and set boundaries for acceptable

behavior. They can improve fairness and autonomy but can also restrict autonomy by limiting decision-making and control. The right policies and rules create a balance among security, fairness, and autonomy, which then drives engagement. During a crisis, policy changes help to signal the impact of the change and clarify the organization's intent. During the COVID-19 pandemic, typical policy implications have included:

- Guidelines for performing in-person work, such as social distancing, temperature checks, masks, or office occupancy, and how to handle situations at work or home in an effort to reduce the spread of the virus.
- Work-from-home protocols along with managing expectations around the reimbursement of incremental costs that result from that environment.
- PTO sharing to help employees assist a teammate dealing with a more acute crisis from the pandemic.

Policy considerations should be made with an eye toward limiting downstream changes. It remains a fluid situation, so establishing principles that align with belief is important. But in some cases, it is more prudent to let the situations play out before locking in a full policy change. Of course, when merited, it would be better to tweak a policy rather than to avoid change that protects a bad policy.

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**COMPENSATION:** Compensation is a special form of policy worthy of its own place on the Engagement



Framework. It is 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, like growth, security, autonomy, and well-being. This has been proven to be especially true during COVID-19 where leaders with cash-flow impacts had to contemplate:

- Furloughing and/or laying off employees.
- Salary reductions, including how they impact leaders versus the rest of an organization, how they should be phased in, and at what levels and what financial results would enable a phased restoration of any reductions.
- Nonsalary compensation impact, including approach and communication around bonuses, profit-sharing, 401K matching, or employee stock purchase programs. As with salary reductions, this includes the degree and breadth of the impact along with any restoration.

Because of the nature of COVID-19, some companies have benefited from the pandemic. For example, manufacturers of personal protective equipment (PPE) and delivery services like DoorDash have seen notable growth in their demand. In these situations, companies had to contemplate growth projections, hiring, profit sharing, and the idea of contributing additional profits toward those who have been hardest hit by the pandemic. Regardless of whether your company is weathering a crisis or not, though, it's critical to align with principles and

ensure the communication lever keeps the organization well informed on a recurring basis.

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**ORGANIZATION DESIGN:** Organization design is another special form of policy worth highlighting. Organization design simply tells you where you fit into a hierarchy, who you report to, and with whom you are expected to interact. The unique nature of COVID-19 required leaders to reassess their organization design and take situation-specific actions such as:

- Temporarily shifting staff to align with core revenue generation functions or to assist in the highest-priority work.
- Aggressively assessing the organization model to remove barriers to the quick and effective decision-making that could help generate revenue and/or reduce cost.
- Incorporating the impacts of any furloughs or staff reductions so that redistributed work does not overburden staff.
- Leveraging available capacity to strengthen organization capabilities that would help with medium and long-term revenue growth and/or cost reduction. In some cases, these capabilities also prepare the organization to emerge from the downturn better positioned for growth.

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**INFRASTRUCTURE** The physical space in which we work can significantly affect relationships, well-being, autonomy,

and growth. During the COVID-19 pandemic, workspace has taken on a surprising urgency as leaders seek to:

- Assess office space usage and look for ways to reduce costs through lease reductions or energy consumption reductions.
- Repurpose existing office space to generate revenue from existing space commitments where possible.
- Modify workspace to accommodate in-person requirements while minimizing the spread of the virus by adjusting the flow of people through the space, promoting CDC guidelines related to social distancing, using masks and sanitizer, and conducting daily temperature checks.
- Help employees assess and improve their at-home work environment for ergonomics and effectiveness.
- Developing a longer-term strategy that reconsiders the organization's need and use of space in a post-COVID-19 world, while factoring in the customer and employee benefits of in-person connection.

#### HOW TO ADAPT YOUR GOVERNANCE IN A CRISIS

The Engagement Framework includes two additional governance levers: control and measurement. Both allow leaders to confirm that your strategy is working as planned, goals are being accomplished, purpose is being met, and that you're holding each other accountable for the work to be done. During COVID-19, these governance

levers can be referenced to measure how the organization is performing throughout the pandemic and to see how any COVID-19-related changes are working.

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**CONTROL:** The control lever is a special kind of process that provides oversight to a project or initiative to ensure it's going as planned. By checking in periodically, we improve security and confirm we're making progress on our goals and influencing growth. Relative to a COVID-19 response, controls could take the form of:

- Status discussions on COVID-19-related change programs, likely related to one or more of the Implementation levers .
- Quality assurance processes intended to bring the organization's best thinking to a program.
- Frequent and recurring leadership discussions around performance of key operational nodes within the organization.
- Frequent and recurring leadership discussions to share perspective on the current operating environment and discuss course corrections on priorities.

Controls need to serve as a way for the team to achieve success and to work together to leverage the range of available talents to ensure any roadblocks encountered can be overcome.

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**MEASUREMENT:** Measurement allows us to objectively assess whether we're successful. It's easy for people to subjectively feel like they're making progress, even though measurable improvement hasn't happened. Measurement allows us to gauge progress fairly, serving as a clear

indicator of growth. Due to the nature of COVID-19, measures could include both COVID-19-specific metrics as well as critical business performance measures, including:

- Volumes and trends for COVID-19 cases, hospitalizations, and mortality.
- Status of government policies (e.g., shelter-in-place) and client/customer policies.
- Employee engagement measures and trends.
- Client/customer satisfaction measures and trends.
- An increased frequency in reporting key business measurements like sales funnel volume, total sales, revenue, inventory, receivables and costs.

While measurement systems are based on the numbers that give us the "What?" of a situation, if they are to provide their greatest value, they should support the analysis that produces the "So what?" and point to actions based on those numbers.

## CLOSING

Crisis response can temporarily overwhelm even the best leadership teams. The Jabian Engagement Framework is a useful tool for teams to analyze the emotional impacts of a crisis on the engagement drivers. After understanding the impacts to employees, customers, investors, suppliers, and the rest of your ecosystem, leaders can use the engagement drivers to influence better outcomes. Keep the engagement framework handy for analyzing and planning around the next crisis you face, or indeed any new problem that comes your way. ◀

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Source:

- 1 <https://blog.smarp.com/employee-engagement-8-statistics-you-need-to-know>