

The Foundations of Engagement

- » A clear sense of mission and goals.
- » Emotional bonding.
- » Capability.
- » Fun.
- » Support.
- » Task value.
- » Feedback.



The Design Framework

Leadership

A Campaign

Learning

Rewards/
Recognition

ROI

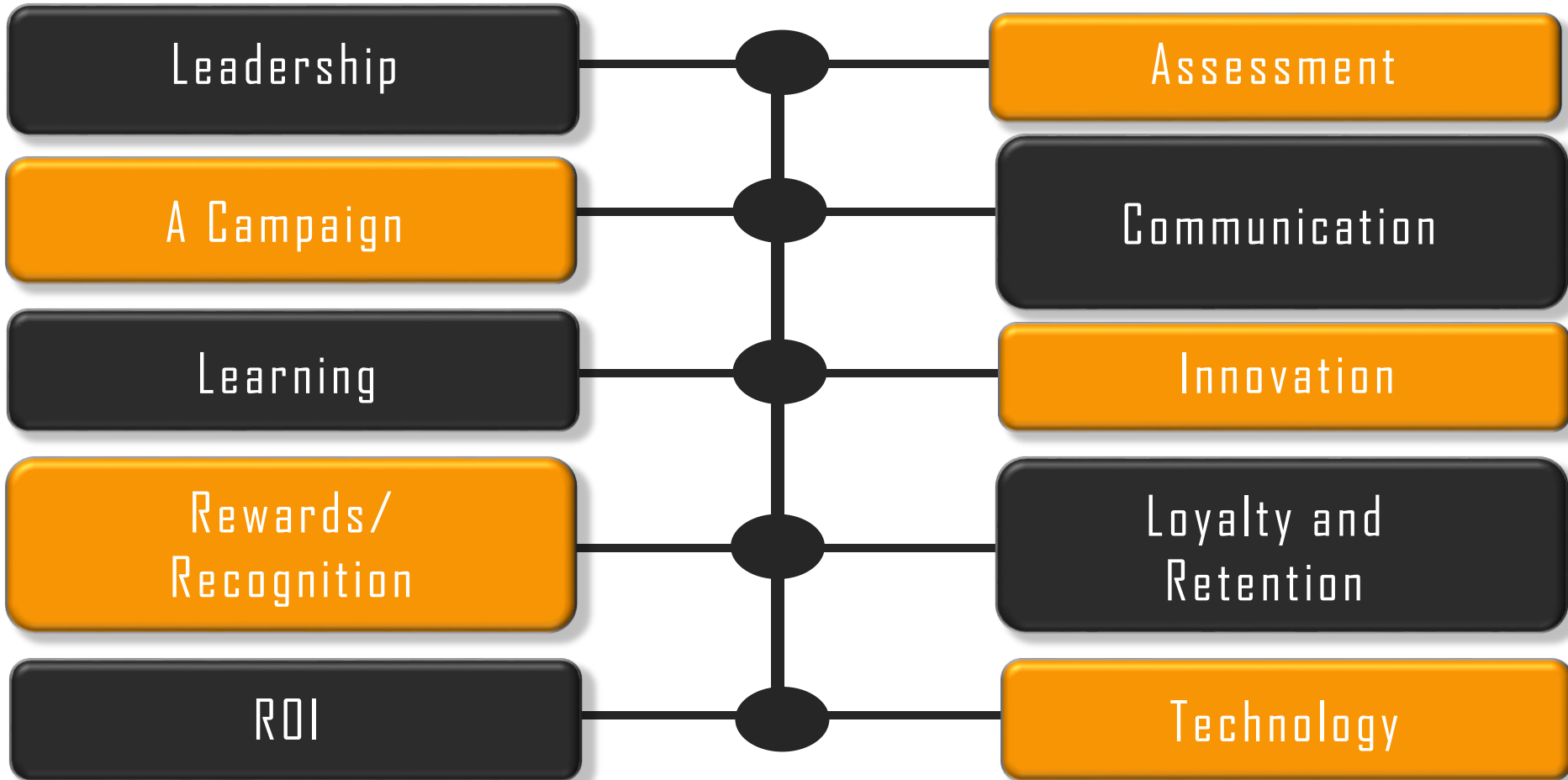
Assessment

Communication

Innovation

Loyalty and
Retention

Technology



An Engagement Plan

- » **Goals & ROI**
- » **The Plan**
- » **Assessment**
- » **Communicate**
- » **Inform**
- » **Innovate**
- » **Reward**
- » **Measure**
- » **Feed back**



The Engagement Tool Kit

Engagement design requires the integration of the following tactics and more:

- » Enterprise branding
- » Audience recruitment and assessment
- » Engagement business plan design
- » Leadership coaching
- » Communications in all of its forms
(Digital, video, face to face, print,
promotional products)
- » Learning
- » Loyalty
- » Promotions, gamification
- » Innovation and collaboration
- » Rewards and Recognition
- » Measurement and analytics
- » Technology



An Engagement Portal can bring all of these tactics together on a single platform.

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The Engagement Plan

- » **Clear goals.**
- » **A clear external and internal brand proposition.**
- » **Audience identification.**
- » **Management assessment and coaching.**
- » **Integrated communications, learning, collaboration, rewards.**
- » **Quantitative, qualitative management.**



Step 1: Clarify the Mission and Goals

- » **What do you seek to accomplish in quantitative and qualitative goals—keep it to three or less.**
- » **What is the ROI measurement in terms of quantitative and qualitative goals.**
- » **Make sure your goals reinforce one another so people stay focused and aligned.**
- » **What are the behaviors critical to succeed.**



Step 2: Create a Business Plan

- » Every element covered by the Engagement Framework should be included.
- » The plan should include a specific return on investment measured against the value placed by the organization on the specific goals, quantitative and qualitative.



Step 3: Identify the Audience

- » **Who specifically do you need to engage and for what purpose?**
- » **What is their relationship to the organization (external or internal)?**
- » **What are their characteristics, demographics, drivers?**
- » **How do they interact with their peers and others?**
- » **How do you connect with them?**



Step 4: Assess and Coach

- » **What is the current level of engagement in key audiences?**
- » **What is standing in the way of engagement or connecting engagement with results?**
- » **Are there any quick opportunities?**
- » **How well is front-line management doing its job?**
- » **What is the best way to communicate, inform, and inspire innovation?**



Step 5: Integrate Communications

- » **How will you communicate with the targeted audience?**
- » **How will you help, not just sell?**
- » **What is the right combination of media?**
- » **Who will you get and manage permissions?**
- » **How will you track interactions and effectiveness?**



Step 6: Address Capability



- » **How will you make sure people are capable of doing what is asked of them?**
- » **What learning or information programs do you already have in place you can better leverage?**
- » **Customers, distribution partners, employees, vendors, and even communities need at times to be trained.**

Step 7: Foster Innovation

- » **What are you doing to foster innovation among customers, distribution partners, employees, vendors, and communities?**
- » **Innovation strategies not only produce profitable ideas, they offer both customers and employees a sense of value that can't be duplicated any other way.**
- » **Innovation makes even menial jobs satisfying.**



Step 8: Reward and Recognize

- » **How are people made to feel supported and valued for what they accomplish?**
- » **What is being done to introduce fun and other positive emotions into the environment?**
- » **How is success being shared with significant others to create memories?**



Step 9: Measure Results

- » **How will results be measured?**
- » **How can you better correlate results with specific actions?**
- » **What was the actual return on investment?**



Step 10: Feedback

- » **How can you get this information back to the people who can use it?**



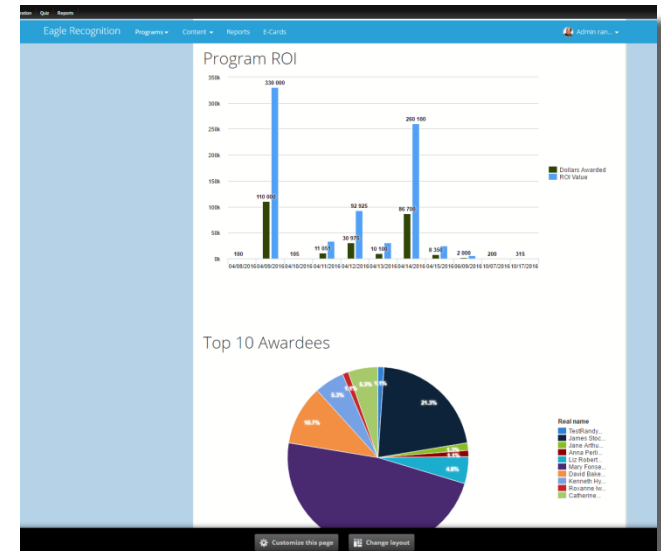
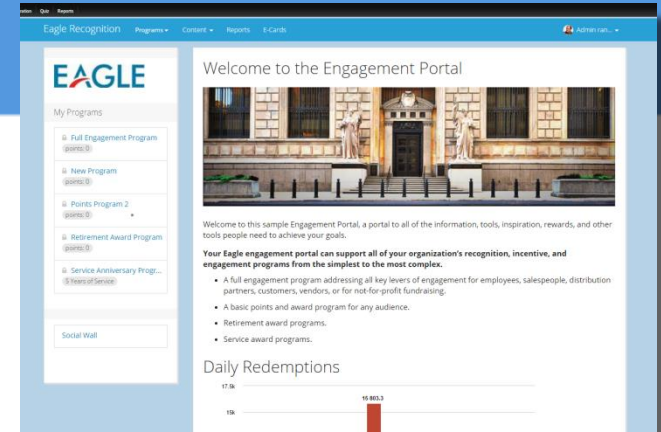
How We Help

- » **Cross-organizational assessment—using your data or ours.**
- » **Formal engagement business plan development.**
- » **Turnkey implementation, including engagement vendor selection and management when desirable.**
- » **Integrated technology addressing all key levers of engagement.**



Engagement Technology

- » An Basic solution for basic engagement implementation.
- » A Portal solution ready for companies wishing to step up to Engagement across the enterprise.
- » Expert support to get the best from the technology.



Walk Before You Run

- » **Benefit from our quick start benchmarking tools to identify opportunities and challenges.**
- » **Test with one particular goal or campaign:**
 - Sales
 - Channel
 - Employee productivity, quality, wellness
 - Community



Next Steps

- » **Preliminary, complimentary evaluation.**
- » **Determine assessment and evaluation strategy.**
- » **Develop test business plan based on your needs.**
- » **Create RFP for general distribution and/or utilize The Engagement Agency for implementation.**

