

CHECKpoint ✓

A Morale and Motivation Pulse of:

Sample Inc

30-Jun-2004

CHECKpoint 2

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Table of Contents

About Your Pulse	1
The Factors and Elements	3
Snapshot	5
Comparative	6
Organisation Pulse	8
Motivating	9
Satisfying	10
Leadership	12
Customer Focus	14
Distribution Response Patterns – by Question	15
Comments	17

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.

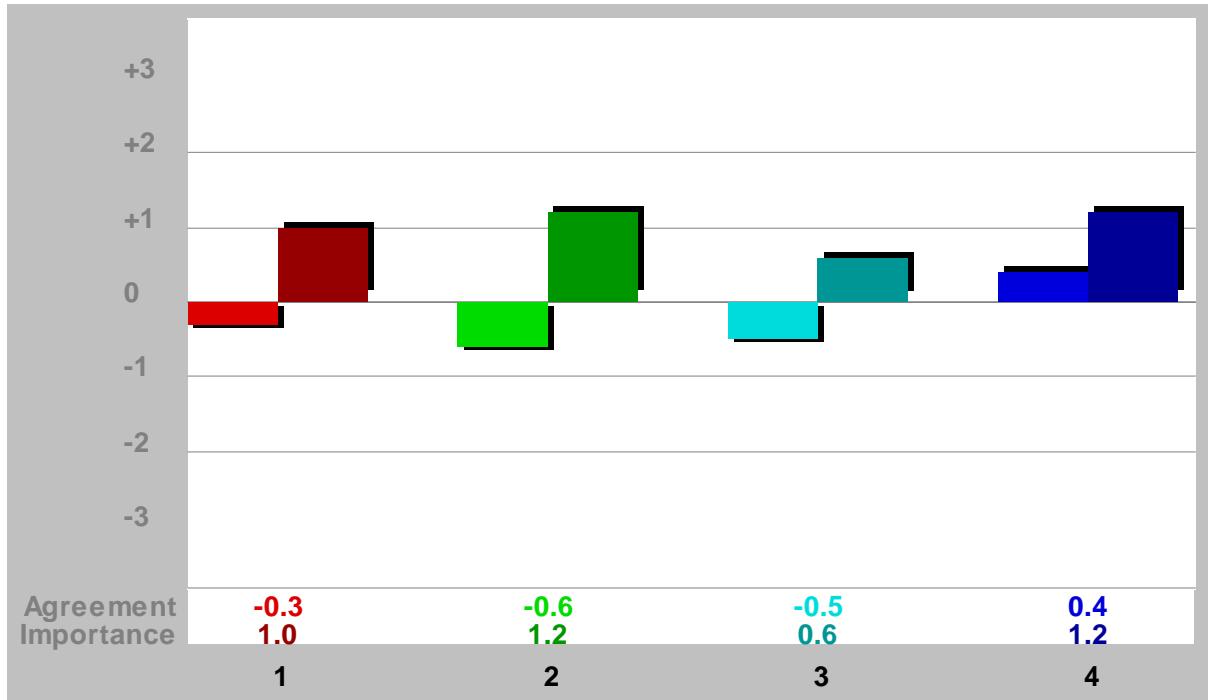
4. Customer Focus

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



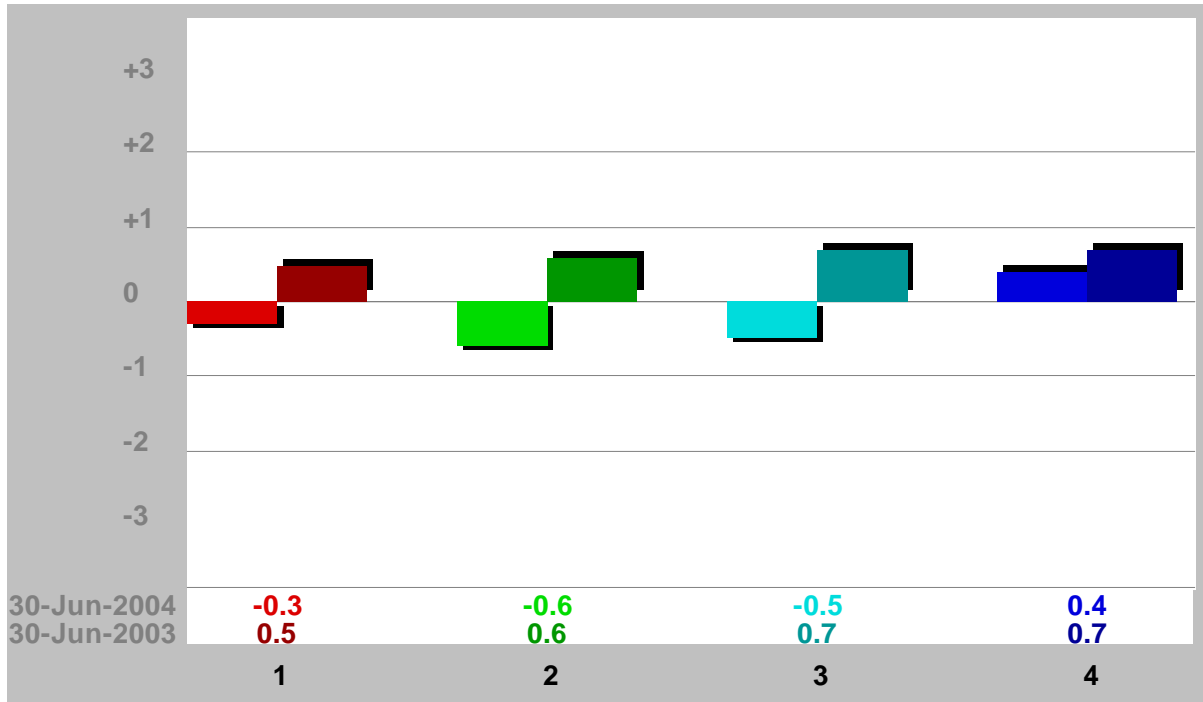
LEGEND

1. **Motivating** factors: those things within the organization that really make people want to come to work each day
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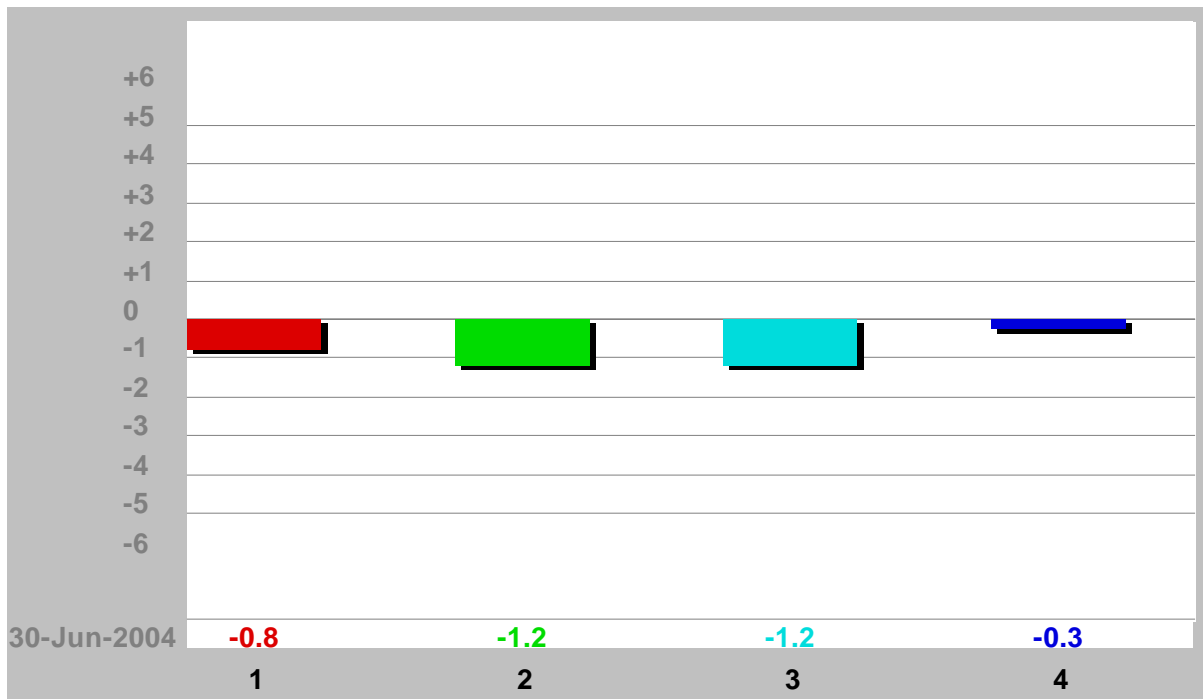
COMPARATIVE

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

THIS PERIOD

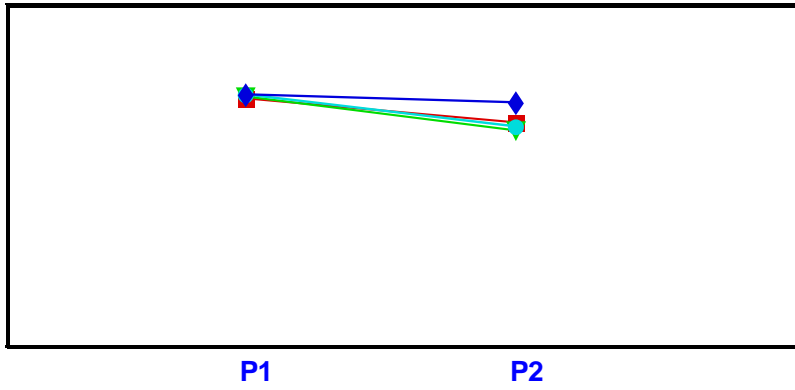


CHANGE ON LAST

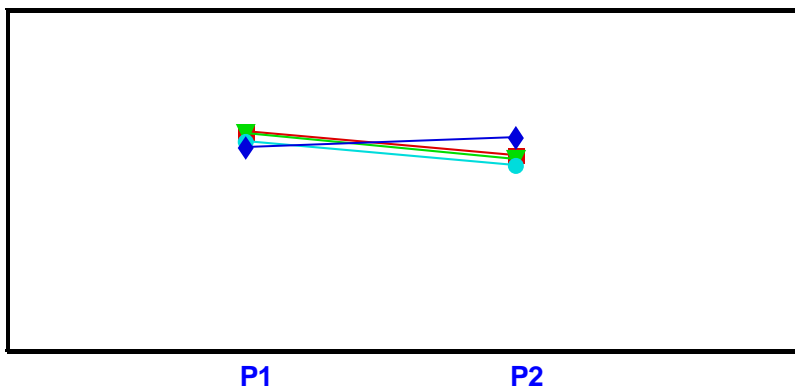


ORGANISATION PULSE

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: 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