NAVIGATING THE MANAGER DASHBOARD

An eligible manager will receive an email invite with reporting site login information to view their reports and survey data. Included in the invite will be a URL that will take them directly into this reporting site. Upon login, the first page a manager will see is the dashboard.

NOTE: All data in screenshots is not representative of any individual or team. *

Within the dashboard, each area – often referred to as “widgets” – shows commonly referenced survey results.

Manager toolkit: The first widget on the top left will allow you to view your toolkit (manager report) and action plan:

1. Understand your survey results
   a. This is where you will download your toolkit to review your results in depth

2. Turn priorities into plans
   a. Managers will use this widget to action plan on survey data. The manager will create an Action Plan specific to any item in the survey relative to their team so that improvement opportunities can be identified and managed.
   b. By clicking “Turn priorities into plans” a manager will be directed to the “favorability report” where they can click on the pencil icon to action plan on a survey question.

Engagement Index: The second widget on the left side will show the Engagement Index. The Engagement Index is an aggregate score of the below items:

- I enjoy working for my company.
• I am proud to work for my company.
• I intend to stay with my company.
• I would recommend my company as a great place to work.

**Drivers of Engagement:** This widget shows the Drivers of Engagement. While we can measure the Indicators of Engagement, they are, in a sense, a form of hindsight. They provide a way to measure progress, but the focus for action planning should be on the Drivers of Engagement. Think of the Indicators as “the speedometer” and the Drivers of Engagement as “the accelerator.”

The drivers are determined by comparing the people with the highest Engagement Index score to the people with the lowest Engagement Index score, and the actionable questions having the biggest gap between these two groups appear with the gold wrench icon next to them. Statistically speaking, action planning on one of these drivers will do the most to increase the engagement levels for the group.

**Response Rate:** The widget on the right will show the completion rate for your specific team.

**Menu Bar:** The Menu Bar is located on the left side of the home page. The options are: Filter Data, Dashboard, Favorability Report, Trend Report, Comments Report and View Action Plan.

**Filter Data:** Use to select a segment of your group. Once you’ve submitted a filter, you can run any report for that segment. Filtered data will only be available for results with 5 or more employees (3 or more in KAP).

**Dashboard:** This will take you back to the main screen of the reporting site.

**Favorability Report:** The Favorability Report shows results for each individual survey question (under the Questions tab) and category (under the Categories tab).

**Trend Report:** The Trend Report shows results for each individuals survey question and the previous survey’s data, when available. A manager will not show any data if they were not here for the prior survey or if the survey question is new or significantly different than a question on the previous survey.

**View Action Plan:** The View Action Plan menu option is another way to action plan on the data.
WHAT IS EXPECTED OF A MANAGER

The manager will be expected to review their results, share insights with their team and action plan. While the dashboard provides a good “at-a-glance” overview of your survey results, you can find even more information – as well as a ready-made PowerPoint presentation for sharing the results with your team – by clicking the “Understand your survey results” icon at the top of your dashboard.

When you click this link, you’ll be asked if you would like an editable PowerPoint file or a non-editable PDF version of the Manager’s Report. Select your preferred option.

ACTION PLANNING: THE KEY TO FUTURE SUCCESS

We recommend a three-step approach to successfully planning and implementing their action plan:

• Select **ONE** question to focus on.
• Identify **TWO** things you can do about it.
• Commit to **THREE** dates you’ll discuss/review this topic with your team.

STEP 1: SELECT ONE ISSUE TO FOCUS ON

The first thing to decide is what to work on. Listed below are some suggestions on how to choose the area of focus:

• The manager might choose from among the questions with the lowest favorability score.
• The manager might choose to address a question where a large percentage of associates disagreed/strongly disagreed.
• The manager might look at questions which have shown a significant decrease in favorability since the previous survey.
• Insights from the team might lead the manager towards a particular question.
• The manager might choose to build upon a departmental strength – an item with high favorability, or that has positive momentum since the last survey.
• The manager might choose a question that scored poorly in comparison to an internal or external benchmark.
STEP 2: IDENTIFY TWO THINGS YOU CAN DO ABOUT IT

Once you’ve selected your area of focus, the next step is to think of possible actions to take and then narrow them down to two. Resources available to help with action planning are:

1. **Your associates** – Use the wisdom of the group to think through actions that can be taken to improve these areas. Brainstorm ideas, and then select one or two solutions which seem most likely to result in improvement based on ease of implementation and degree of impact.
2. **Your local HR team** – Your HR business partners are there to support your effort, whether facilitating action planning sessions or providing additional thoughts on best practices.
3. **Actionable Insights** – For each scaled question on the survey, there is an “Actionable Insights” page which is available to you on the Reporting and Action Planning site. These pages consist of two main areas:

   ![Image of Actionable Insights]

   **Questions to Consider**
   Thought-starters for you and the team to uncover what factors could improve the favorability score of certain questions.

   **Possible Action Steps**
   A list of suggested activities that you can undertake to bring about positive change in your group. As you’ll see, these action steps can easily be accessed electronically and added to your action plan on the Action Planning site. You can keep them as they are, or edit them to customize for your group.

STEP 3: COMMIT TO THREE DATES WHEN YOU’LL DISCUSS/REVIEW THIS TOPIC WITH YOUR TEAM

Commit to three dates that you’ll communicate progress on your action plan. This can be done through email or an update during a regularly scheduled team meeting. Ensure there is a two-way dialogue with your team. Ask them if they’ve seen signs of progress and what more could be done to continue to improve.
HOW HR CAN SUPPORT MANAGERS

Key tips to remember when supporting your managers:

• **Review and Understand** the survey results. Being prepared for questions from your managers will show your commitment to the survey process.
• **Be familiar** with the action planning process. Point out the drivers of engagement, action planning suggestions and actionable insights. These three pieces will be key in improving their results in future years.
• **Encourage the managers** to share the slides and discuss results with their team.
• **Share your thoughts** on which question(s) are most important to focus on.
• **Discuss their plans going forward** – let the manager know you are their point of contact as they move through the action planning process.
• **Follow up** with the manager after a few weeks. If the manager knows you are committed to the process, they commit themselves.
• **Thank the manager** for their effort in action planning. Reiterate that they should continue to work with you and their team to take actions to improve results.