

INSIGHTS · ACTION · IMPACT

Pathway to Workplace Excellence

Introduction and Session 01: Pre-Survey Readiness

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Today's Webinar

01 Workplace excellence and the business case

02 What gets in the way of survey success

03 The Pathway to Workplace Excellence

04 Phase One: Pre-survey Readiness, Checklist, and Timeline ← TODAY'S FOCUS

05 Client perspectives and measures of success

Energage Consultants

Introducing your hosts for the Workplace Experience Webinar Series



Janet Swaysland



Dr. Candace Goodwin

We've got the data, the science, the experience, the stories… and your back.

20YRS
Workplace Research

80K
Companies Analyzed

30M
Employee Voices

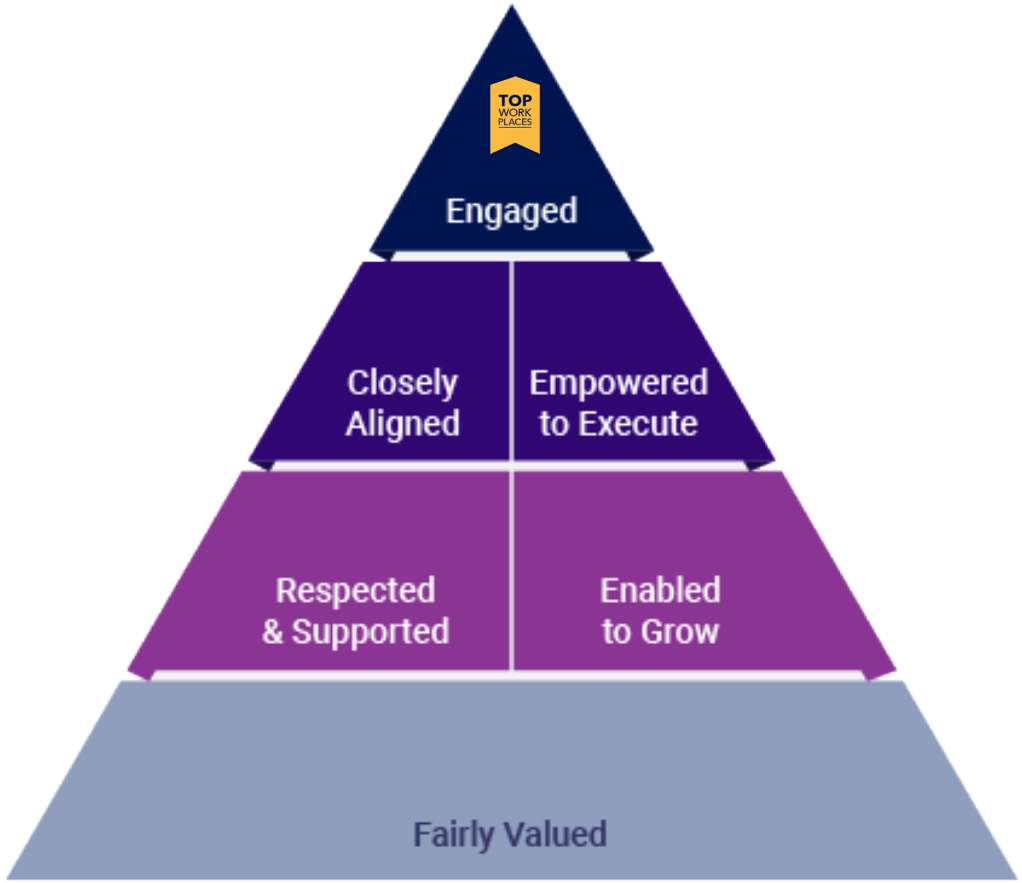
500M
Data Points Collected

For more than 20 years, we've studied what truly sets Top Workplaces apart from the rest.

WHAT WE MEASURE

What Does a Great Workplace Experience Look Like?

"I'm part of something meaningful.
I'm learning and growing.
I feel included and respected.
I feel appreciated.
I have a voice and feel heard.
I accomplish things, get things done.
I am safe and treated fairly."



What Does it Take to Get There?



Executive Ownership

Senior leaders align on enterprise priorities and model accountability from the top down.



Managers Trained to Coach

Frontline and mid-level managers use shared tools and language to lead meaningful team conversations.



Employees Owning Engagement

Employees contribute to the process as active partners in workplace improvement.



Exceptional Communication

Consistent, transparent messages help employees understand what is happening and why it matters.



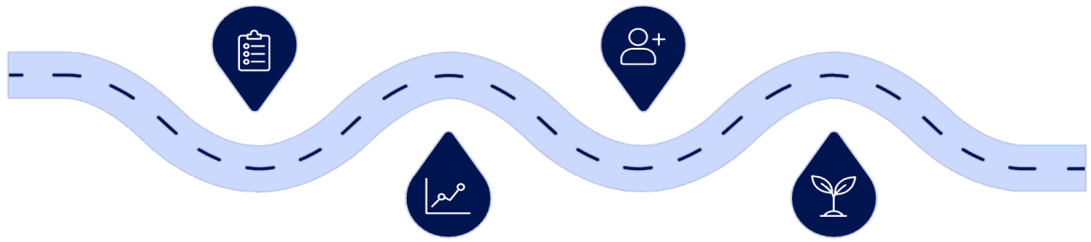
Disciplined Action Planning

Structured planning and accountability convert intentions into sustained action.

What Gets in the Way of Success?

1. **Survey launches and closes**
   Employees participate, often unsure how results will be used.
2. **Results delivered as a report**
   Leaders review scores without a framework for action.
3. **Momentum fades**
   Commitments remain informal and follow-through varies.
4. **Action gets stuck**
   Priorities shift and progress stalls.
5. **Trust erodes**
   Employees become skeptical that their voice matters.

Pathway to Workplace Excellence Offers a New Approach



A structured approach that prepares the organization, aligns leaders, activates teams, and sustains progress.

PREPARE | ALIGN | ACT | SUSTAIN

LET'S GO

Pathway to Workplace Excellence

01

Pre-Survey Readiness

Support survey structure, stakeholder preparation, training, and communications.

02

Leadership Alignment

Connect findings to leadership priorities and establish a plan to act.

03

Team Activation

Mobilize teams to discuss feedback and participate in action planning.

Ongoing

Sustained Impact

Embed practices that drive progress and long-term change.

Phase One: Pre-Survey Readiness: What Clients Gain

Employees provide more honest and meaningful feedback when they understand why the organization is asking and trust that leaders will listen.

HOW WE SUPPORT YOU

- ❑ Communication of the purpose and value of the employee survey.
- ❑ Translating workforce data into business impact.
- ❑ Asking higher level, differentiating questions.
- ❑ Leading C-suite and CHRO conversations confidently.

SKILLS YOU WILL BUILD

- ❑ Build employee trust and create conditions for honest feedback.
- ❑ Set expectations with employees and leaders about what happens next.
- ❑ HR advanced understanding of the survey and interpretation of results.

Checklist

1 Set the Foundation

- Aligns the people team on strategy, messaging and logistics
- Review survey items, demographics, benchmarks, and reporting thresholds
- Check timing against organizational changes and peak workloads

2 Prepare Leaders

- Prepares managers and leaders to champion participation and set expectations
- Reinforce confidentiality and prepare for post-survey next steps
- Talk through entire survey timeline for enhanced employee awareness

3 Expert Survey Set-Up

- Set up survey based on what leaders need to learn and decide from results
- Review survey items, demographics, benchmarks, and reporting thresholds

4 HR Partner Enablement

- Equip HR partners with advanced understanding of survey results to drive action
- Build awareness, excitement and trust among HR team

Client Examples: "Imagine a World Where …"

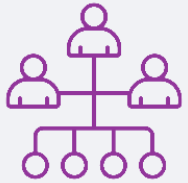
> *This is our third year conducting our survey and the first time we really looked at our survey set-up with a consultant. This new lens gave us a different way to examine the data and made it easier for leaders to decide how to respond.*

> *Energage support has helped us structure the survey to provide meaningful organization-wide data while still identifying trends and opportunities within specific groups. The best-practice recommendations have been very helpful.*

> *Having a consultant work directly with our HR team has made all the difference.*

> *The ongoing consulting partnership has been incredibly valuable. A thought partner who understands our organization and survey history helps us direct results, support leaders, and maintain momentum throughout the year.*

Success is…



A CEO

Who can name the top engagement priorities and who owns them.



A Manager

Who enters a team conversation with a plan and leaves with commitments.



An Employee

Who sees their feedback lead to something real.

Success is more than a survey score

Questions



What's Next?

1 Continue Attending the Webinar Series

- When: October 13 & 20 | 1:00 p.m. ET
- Make sense of the results — October 13
- Show employees their feedback matters — October 20
- Engagedly.com/pathway-workplace-excellence/

2 Complete the Webinar Feedback Survey

- Your feedback helps us improve future sessions
- Survey link provided in the chat



Let’s Build a Workplace Where People and Performance Thrive

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