

EBOOK

# Forsta and ENGAGE

Using employee engagement to drive strategic action and business growth

ENGAGE specializes in employee engagement, leadership effectiveness and internal communication, and works to the principle that by engaging people, companies can drive performance.



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ENGAGE works with a wide range of leading brands and organizations across the UK, Europe, the US and at a global level, all of whom trust the organization with their most valuable asset: their people. One such client is the UK's largest retail general insurer which owns a range of brands delivering insurance services to millions of customers through multiple channels. ENGAGE began working with the insurer in 2014 to undertake a strategic, long-term employee engagement program.

## About ENGAGE

Every program ENGAGE delivers is tailored to the strategic objectives, challenges, culture and change requirements of its individual clients. Programs are driven by smart data and analytics, which the ENGAGE team uses to create and deliver engagement strategies using qualitative research, surveys, employee apps and ongoing advice and programs.

ENGAGE helps clients accelerate their leadership effectiveness through diagnostics at both individual and team level and supports this with coaching and leadership development interventions. ENGAGE also delivers high-impact internal communication using audits of their channels, messaging and audiences and then providing advice and improvements to all three.

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LEADING INSURER

# Engaging every employee

The insurer's employee engagement program covers all 12,000 of its staff across the UK and two offshoring populations in India and South Africa. It was undertaken to support the group's strategic evolution; having created the original revolution in the sector with the move to telephone-based insurance, the firm now wanted to create a second, digital revolution, making insurance easier and better value for customers.

Andy Brown, CEO at Engage, explains: "The employee engagement program represented a huge cultural and technological shift for the organization, and was considered a critical part of ensuring its services could be delivered to customers as easily as possible. The group saw that their people were the key enabler of strategic change."

ENGAGE developed a comprehensive program, built upon the Forsta's solution, to gather insight about current engagement levels and the potential drivers of this engagement across the organization and different employee segments. The program centered on a tailored set of questions, deployed via web based employee engagement surveys to every member of staff. These staff spanned head office, regional contact centers, remote underwriting teams, and regionally-based vehicle repair centers.

From the feedback gathered, reporting using Forsta was delivered to two key audiences. The group's leadership team was given strategic insight and advice on how engagement could be improved with different segments of the employee population. This gave the team the framework needed to develop and share a set of firm-wide engagement priorities and drive accountability across the manager population. At a more local level, people managers and team leaders were also provided with engagement priority analysis reflective of their specific employee groups. Initially targeted at just the top 300 managers, within 12 months of launch, the program was providing 1,300 managers with tailored reports about their team's engagement and how to make improvements.

## IN NUMBERS



Tailored reporting for  
**1,300 managers**



**Over 60,000**  
individual pieces of feedback  
collected



**60% increase**  
in full engagement to 73%  
over 2 years

## Broadening the scope

**“This is a unique platform, built using the combined technology expertise of Forsta and our own experience of what really drives employee engagement.”**

ANDY BROWN, CEO, ENGAGE

In 2015 and 2016, the program evolved to not only gather feedback, but also to drive action. ENGAGE and Forsta developed a bespoke platform for the insurer to encourage and capture the outputs of effective and ongoing engagement conversations between employees and their managers.

Andy Brown says: “This is a unique platform, built using the combined technology expertise of Forsta and our own experience of what really drives employee engagement. It allows managers to log their plans for team development, and for managers-of-managers to view, track progress and share successes across all of their teams. Critically, the platform also demonstrates to leaders and managers the impact that making changes will have on the business, creating a culture of pro-activity and accountability.”

In 2017, ENGAGE went live with the sixth wave of measurement. To date, the program has been used to gather and evaluate over 60,000 individual pieces of feedback, which has been used to directly inform critical business decisions and drive performance across the insurance group.

# Driving direct action

The insurer's employee engagement program has driven key areas of action:

- The development of a bespoke platform with Forsta, allowing for ongoing employee engagement. Managers log their plans for team development, and managers-of-managers can view, track progress and share successes across all of their teams. Access to online training is also provided, allowing managers to understand how best to use and action feedback from their teams.
- ENGAGE holds sessions with the Executive Committee after each main wave of the survey to share firm-wide results. This creates buy-in to the survey process and drives action right at the top of the firm. The ExCO always takes the first step in creating a team-based action plan before asking all other teams in the business to do the same. This example of role modeling has been a key driver of the program's success.
- ENGAGE has helped the insurer to connect its employee survey data to harder business metrics, such as HR performance and absence metrics, and customer service scores, to assess the ROI being obtained by improving engagement levels. This has reinforced the crucial role of employee engagement in supporting the organization's overall strategy and growth.

# Linking engagement to strategic priorities

The tailored and business-centric nature of the engagement program means that the key metrics tracked and reported are directly related to the group's key strategic priorities. This includes a very tough measure of engagement that differentiates between teams that are really performing and contributing to the firm's success and teams that need improvement.

To be considered truly engaged, employees must score positively on all six questions in the engagement model – therefore showing a high level of engagement with the firm as an employer, the firm's current and future customers and the firm's ambition for the future.

In addition to this, ENGAGE also tracks a measure of talent retention, looking at the engagement and loyalty levels of employees together to ensure the firm is retaining its high performers. While the program delivers a great measure of these key outcome metrics, ENGAGE's focus with leaders and managers has always been on the critical drivers of these. To this end, the program provides key stakeholders with a range of employee experience KPIs to assess the culture, opportunities, management and leadership of the firm.



## Sharing engagement results to drive action

The feedback gathered from the program is shared across the insurer's organization in a number of ways, all of which aim to ensure individuals and teams can understand the insight obtained and take appropriate action. The leadership team receives graphical representations of strategic analysis with narrative backed up by Forsta dashboards that show trend and segmented results.

A spokesperson for the insurer says: "This information has provided a real education for our leadership team in terms of the impact of measuring engagement and taking action on specific areas for improvement. It has also provided insight into the customer experience provided by our staff, particularly in terms of how they can be empowered to engage with customers, and the extent to which they are engaged with the pace of change around our growth. By sharing engagement insight at the most senior level, all departments now have ownership of employee engagement – not just the HR department."

All team managers also receive bespoke reporting, using a hybrid of surveying and Forsta and delivered as PDFs.

Results have shown that those managers who are regularly having conversations with their team around their survey results

and working together to create action plans are also those with higher levels of engagement. The spokesperson continues: "Over multiple surveys we've been able to confirm this for each wave. This shows there is a direct correlation between dialog, action and improved engagement. By sharing engagement insight at the team leader level, we've been able to reinforce manager accountability and also show we are actively listening to employees."

Operations, too, get detailed information from Forsta, which shows granular, 'sliced and diced' engagement insight trends across not only divisions and teams, but a variety of demographic characteristics. This allows the insurer as a whole business to target and track compliance via engagement reporting, and to more clearly map business growth and development based on feedback about operational efficiencies across the business.

## FORSTA PROVIDES:



**Surveys to 12,000 employees**



**Custom reporting dashboards**



**PDF reports tailored to managers' requirements**



**Action management to ensure effective follow up where required**

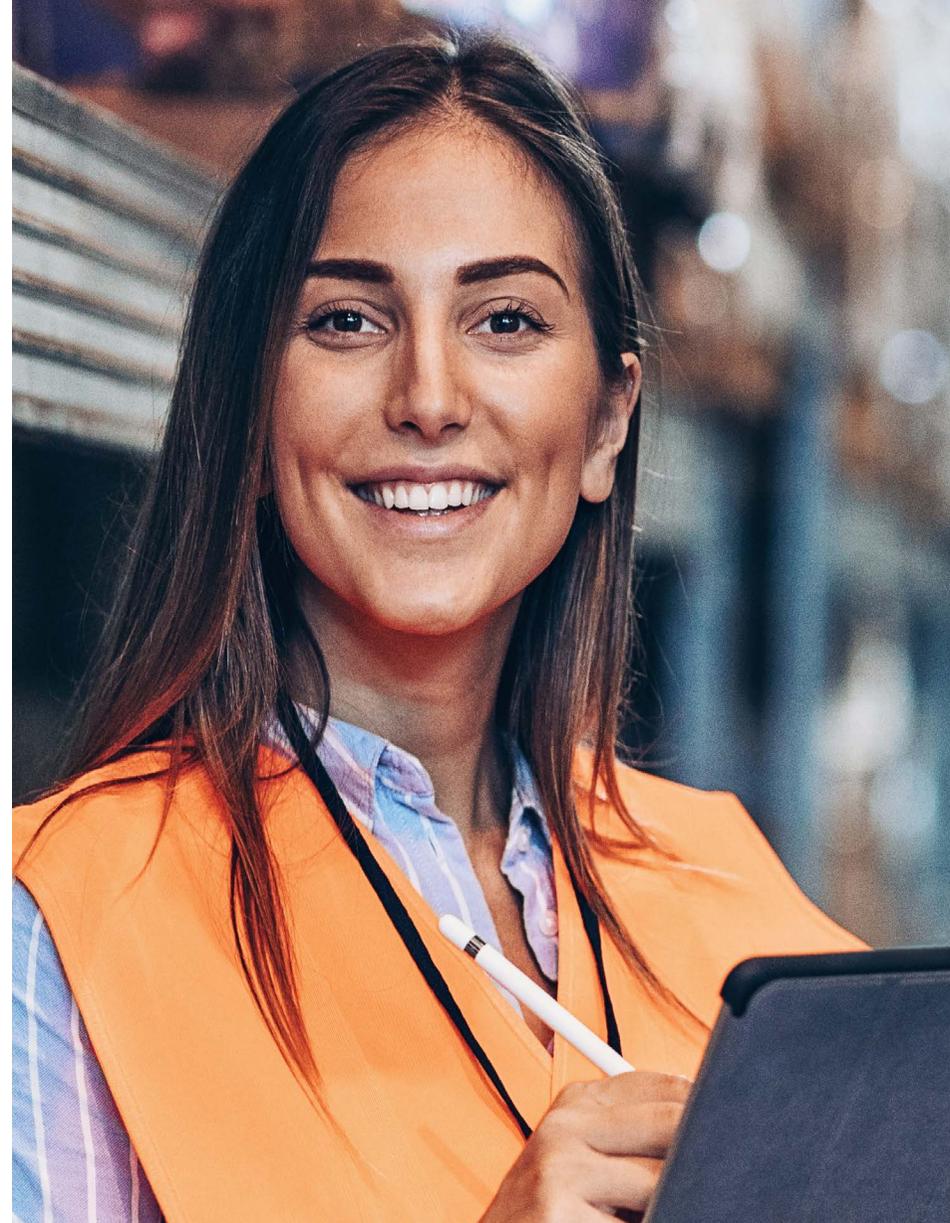
# The measurable success of engagement

As a result of the program that Engage and Forsta have delivered, the insurer has seen an improvement in engagement levels and employee intention to stay. Over the past two years, full engagement has risen by over 60% over 24 months and is now at 73%.

Providing employees with a clear understanding of their role in the business, their impact on delivering service, and their own opportunities to grow and develop has also shown a direct link to lower levels of absenteeism and sickness. This has reduced costs to the businesses, as well as increasing employee performance, to the extent that the CEO has recognized the measurable impact of engagement on the bottom line.

Since its inception, the program has also driven total cultural change. It has become so embedded in the business that people ask when the next wave is coming and are actively seeking to participate. At the most senior level, the CEO of the organization cites the employee engagement program as having had a positive impact on the organization's structure, culture and competitiveness.

The spokesperson concludes: "We are incredibly proud of how well the program has embedded into the business. It's a valued tool that has really made a difference for both leaders and colleagues. "Faster reporting has meant that results are more reflective of the current mood which has allowed us to really understand our business 'in the moment' and put actions in place which feel timely and relevant. The action planning process ensures that everyone has visibility of results and are acting with their colleagues to improve our workplace for the better."





Growing Smarter Together

Forsta is the world's leading provider of Experience & Research Technology, working together with our clients to help them discover, understand, and share human-centered insights packed with real action potential.

[forsta.com](https://forsta.com)

515 Madison Ave., Suite 8112, New York, NY, US 10022  
t. +1 212 660 1800 [www.forsta.com/contact](https://www.forsta.com/contact)