

# THE BUSINESS OF PURPOSE

A Workbook to Elevate Employee  
Engagement & Organizational Results

By M. Brooke Moran, Ph.D.



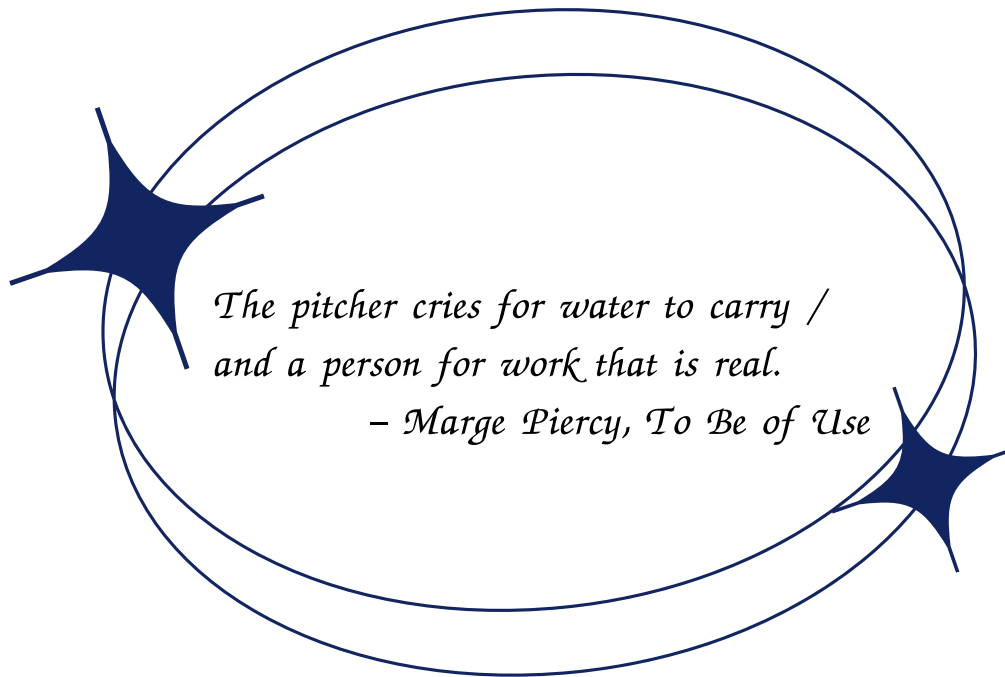
Purpose-Driven Employee Engagement Model  
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Dear Readers:

Please use this employee engagement workbook to help your organization engage people in real work that inspires and creates positive, sustainable change.

With gratitude,

Brooke



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# INTRODUCTION



Employee engagement is a powerful indicator of organizational success. Research reveals that engaged employees contribute to workplace physical and emotional safety, they're healthier, happier, more satisfied at work, have better home lives, less absenteeism, are more loyal and stay with the organization longer, facilitate a superior customer service experience,

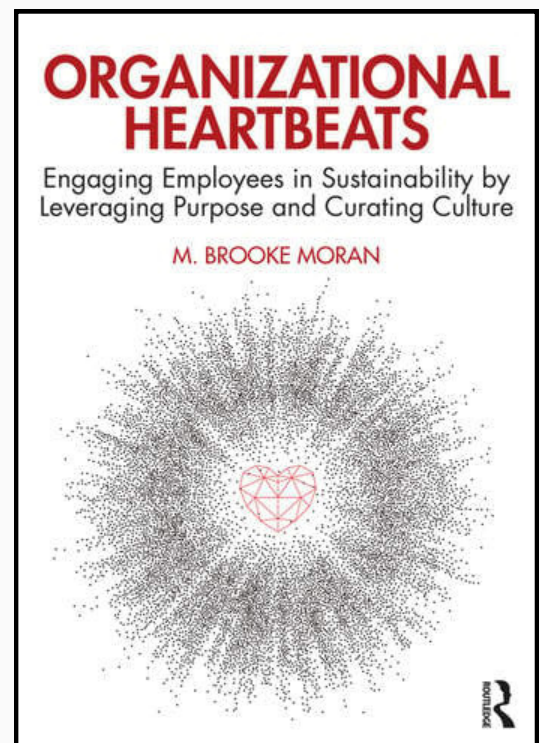
produce higher quality work, are more productive, and have higher sales.

Companies with highly-engaged employees experience up to 21% higher profitability and higher stock prices [i] than their peers. Furthermore, purpose is one of the most powerful predictors of employee engagement. These are incredible benefits to harness, yet there is very little information on HOW to engage employees. The original Purpose-Driven Employee Engagement Model that is highlighted in this workbook, and the case study research that informed it, helps demystify HOW to effectively engage employees.

The model is for leaders and managers aiming to robustly engage employees in social, economic, and/or environmental sustainability - that is, purpose-driven work.

The case studies and model are featured in *Organizational Heartbeats: Engaging Employees in Sustainability by Leveraging Purpose and Curating Culture* (Moran, Routledge, 2020). This Workbook can be used as a companion to the book, particularly for those seeking inspiration in creating purpose driven employee engagement initiatives or strategy. Or, it can be used by itself.

Elevate your employees' engagement in purpose-driven work. You will be serving employees, your organization, as well as customers, your community, and the marketplace.



# SUGGESTED AUDIENCE

This workbook will be most useful for the populations listed below. The model is not an assessment; it is a tool for designing and/or evaluating employee engagement strategy and initiatives.

Founders and owners wanting to build a robust business, in part via the myriad benefits of employee engagement.

Organizational leaders charged with employee engagement, such as those in the C-Suite, human resources, talent management, learning and development, and sustainability / corporate social responsibility.

Consultants and facilitators, hired to help organizations build a robust employee engagement strategy / practice.

Business school students investigating the power of organizational purpose and/or employee engagement.

Middle managers striving to catalyze organizational change.

Professional coaches aiming to pose open-ended questions for clients grappling with their employee engagement initiatives or strategies.

## Operational Definitions

There are various definitions of the terms below, so definitions have been provided, so the reader understands what I mean when I use them.

*Employee engagement* “is the emotional commitment the employee has to the organization and its goals,” [ii] which is different from happiness or satisfaction, and it is critical to organizational viability.

*Purpose-Driven work* does not solely focus on economic exchanges, but rather focuses on inspiration and aspiration; “it explains how the people involved with an organization are making a difference, gives them a sense of meaning, and draws their support.” [iii]

*Culture* is the stories we tell ourselves about what is valued, expected, and accepted in teams, organizations, and working groups.

*Sustainability* is a systems-thinking approach to life, business, and decision making that attends to economics, people, and the environment, so as to thrive in perpetuity. [iv]

## Workbook Format

The Purpose-Driven Employee Engagement Model is presented through WHY, HOW, and WHAT lenses. If you have limited time, use the Quick Start Guide (QSG) and delve into the Workbook at a later date. Both the QSG and the Workbook offer questions, as well as evaluative, reflective, and creative prompts to aid in assessing and/or creating employee engagement strategy.

# QUICK START GUIDE

The Quick Start Guide can be completed by one person, a small team, or several small teams that then compare notes. Read through it and jot down notes in 30-minutes-or-so, and then ponder and observe employee engagement strategy and initiatives over a few weeks. Or facilitate a mini retreat with a small team and engage with the questions over the course of a day. Start with WHY, then investigate HOW and WHAT, or engage in the reverse order. You could even bounce around. In short, make the Quick Start Guide work for you.

## WHY = Purpose

The WHY is the heart of your organization. When effective, it informs the organization's values, guides operations, and speaks to employees' hearts and values, as well as to customers, and marketplace needs.

If 100% of employees can't clearly state your organization's purpose, or vision statement, list potential means of closing the gap.

## HOW = Scaffolding

The HOW dimensions of the model includes Curate Culture, Values Alignment, Systems Integration, and D2R2 (Design, Do, Reflect, Refine); these facets create the scaffolding for employee engagement initiatives.

What resources are available to you (and/or could you secure) to aid in more robustly curating a culture of purpose-driven employee engagement?

How well is each employee engagement initiative aligned with the organization's and employees' values? Rate each on a scale from 1 (low) to 5 (high).

Consider each employee engagement initiative (or just a few to get started). Identify the system into which it is integrated (e.g., recruiting, onboarding, training, professional development, annual reviews, exit interviews, alumni engagement, strategic plan, standing meetings).

Describe the process such as D2R2 (Design, Do, Reflect, Refine), that guides your employee engagement strategy, including evaluating effectiveness.

## WHAT = Methods

The WHAT focuses on details of employee engagement initiatives, which can be conceptualized on an employee engagement energy and investment spectrum, from low = Raise Awareness to high = Action & Ownership, with Education positioned in the middle of the spectrum. Because employees have varying bandwidth, learning styles, and interest in different sustainability/purpose-driven initiatives, it is important to design initiatives that require different levels of engagement, time, and energy, as well as vary creatively.



List two strategies that have been most effective at raising employees' awareness about organizational initiatives, accomplishments, events, et cetera and list two strategies that have been least effective. Aim to identify why.

Most Effective

1.

2.

Least Effective

1.

2.

What percentage of your employees participate in educational opportunities? Does participation vary between regions, departments, ranks, functions, et cetera? Which initiatives are mandatory versus optional and why?



What do the Action & Ownership initiatives have in common and/or what makes them unique? Aim to identify patterns contributing to effectiveness and ineffectiveness.

**NOTES**

**END OF QUICK START GUIDE**



# **THE BUSINESS OF PURPOSE EMPLOYEE ENGAGEMENT WORKBOOK**

Choose to begin creating your employee engagement strategy or audit via the Quick Start Guide or here, via the comprehensive Workbook. Endeavor to answer every question, or focus on those that will be most useful in helping you reach your goals.

# WHY=Purpose

The WHY is the heart of your organization. When effective, it informs the organization's values, guides operations, and speaks to employees' hearts and values, as well as to customers, and marketplace needs.

Write your organization's purpose here:

Estimate what percentage of all employees can clearly state the organization's purpose.

10%

20%

30%

40%

50%

60%

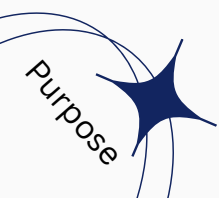
70%

80%

90%

100%

Ask a diverse mix of employees to state your organization's purpose. How does your estimation compare with reality? What did you learn by speaking with employees?



What differences exist (e.g., training, seniority, location, function, division/department) between those who can clearly state your organization's purpose and those who cannot?

If 100% of employees can't clearly state your organization's purpose, list potential means of closing the gap.

## NOTES



# HOW=Scaffolding

The HOW dimensions of the model includes Curate Culture, Values Alignment, Systems Integration, and D2R2 (Design, Do, Reflect, Refine); these facets create the scaffolding for employee engagement initiatives.

## Curating Culture

In what ways does your organization curate a purpose-driven employee engagement culture?

What resources are available to you (and/or could you secure) to aid in more robustly curating a culture of purpose-driven employee engagement?

Who are internal and external key stakeholders, gatekeepers, partners, and/or consultants who do/can help with culture curation?

## Curating Culture

What will success look, sound, and feel like when you've achieved a rich culture of purpose-driven employee engagement?

## NOTES

## Values Alignment & Systems Integration

Using the tables on pages 16 & 17, endeavor to do the following:

- List some or all existing and/or planned employee engagement initiatives, duplicating the table as needed. Use the space below to brainstorm, if you like, before adding specific initiatives to the table.
  
- Consider Values Alignment:
  - On a scale from 1 (low) to 5 (high), evaluate how well each initiative aligns with the organization's and employees' values.
  - For the lower ratings (1-3), consider how you might adjust the initiative to have better values alignment, or decide if your resources are better spent elsewhere.
  
- Consider Systems Integration: Identify the system into which each employee engagement initiative is / ought to be integrated; consider suitability to catalyze desired change.
  - People systems: recruiting, culture change, organizational development, hiring, onboarding, training, professional development, performance assessment, customer service, exit interviews, alumni engagement, strategic planning, et cetera.
  - Other systems: strategic planning, business development, supply chain, product design and development, marketing, purchasing, website, operations, accounting, payroll, safety, inventory, research and thought leadership, information technology, sustainability, et cetera.

If no system is suited to adopt the initiative:

  - Determine if the initiative is crucial (yes/no).
  - If so, identify who should own it.
  
- Prioritize initiatives.
  
- Assign a timeframe; this could entail aligning with another annual event, or it could be a best guess for the future (e.g., in 2-3 years)

\*Tip: If you don't know employees' values, ask them and/or engage in a teaming exercise wherein people share their values. See Appendix A for a brief values exercise. Investigating and establishing personal and organizational values is deep work, so please just let the offered exercise be a starting point.

<b>Employee Engagement Initiative</b>				
<b>Values Alignment: Organization</b>				
<b>Values Alignment: Employee</b>				
<b>Integrated into which system?</b>				
<b>Priority</b>				
<b>Key Stakeholders</b>				
<b>Timing</b>				
<b>Notes</b>				



<b>Employee Engagement Initiative</b>				
<b>Values Alignment: Organization</b>				
<b>Values Alignment: Employee</b>				
<b>Integrated into which system?</b>				
<b>Priority</b>				
<b>Key Stakeholders</b>				
<b>Timing</b>				
<b>Notes</b>				

## Design, Do, Reflect, Refine (D2R2)

This facet of the model is a reminder that following a process will help employee engagement strategies to be successful. Engaging in the WHY and HOW steps above addresses the REFLECTION step in D2R2 – and even a bit of the REFINE and (RE)DESIGN steps. Now it's time to continue onto DO (implementation), and then again to REFLECT and REFINE. Employee engagement assessments fall into the Reflect step.



Employ D2R2 as:

- A guide when creating a purpose-driven employee engagement strategy. For example, when designing initiatives, it's important to consider curating a culture of purpose-driven employee engagement, aligning initiatives with company and employees' values, and integrating initiatives into existing systems; or
- A process guide to refine existing strategy and provide scaffolding going forward.

Clearly define when you will check in on your D2R2 progress:

- Example: during bi-monthly meetings, we will state where we are in the process (i.e., design, do, reflect, or refine), including percentage complete in the given phase (e.g., 30%, 65%, 90%); we will also celebrate wins, note areas for improvement.

Identify key stakeholders that ought to be involved at various steps of the D2R2 process, with some stakeholders serving consistently and some joining at critical points. The number of stakeholders will vary, depending on the size of your organization and scope of your employee engagement initiative(s).

- Consistent Stakeholders. Examples: Representatives from HR, Talent Development & Finance.
- Critical-Point Stakeholders. Examples: Representative from key department(s) being affected to identify current and potential pain points, people to review design, report impact, et cetera.

## Design, Do, Reflect, Refine (D2R2)

Identify what you will do with the information that you receive from stakeholders, when, and why.

- Example: We will provide the executive team updates during the DO and after the REFLECT stages, so they are aware of current employee engagement initiatives, they can ask questions, and provide input and resources as applicable.

Identify how you will evaluate effectiveness? Create 3+ measurable and objective benchmarks.

1.

2.

3.

## Design, Do, Reflect, Refine (D2R2)

Check in with your gut, senses, and subjective input:

- What did/will you observe with your eyes that was/will be effective/ineffective?

- What did/will the energy feel like in the room / around the workplace?

- What did/will you hear (reinforcing or developmental) or not hear, perhaps suggesting a lack of impact?



# WHAT=Methods

The WHAT focuses on details of employee engagement initiatives, which can be conceptualized on an employee engagement energy and investment spectrum, from low = Raise Awareness to high = Action & Ownership, with Education positioned in the middle of the spectrum. Because employees have varying bandwidth, learning styles, and interest in different sustainability/purpose-driven initiatives, it is important to design initiatives that require different levels of engagement, time, and energy, as well as vary creatively.



## Raise Awareness











In what small ways do you relay information to employees regarding company purpose, values, philosophy and practices of leadership, sustainability initiatives, special events, et cetera? Consider signage, memos, office supplies, messaging throughout various stages of the workforce lifecycle. Rate the effectiveness of each on a scale from 1 (ineffective) to 10 (highly effective). If time and bandwidth allow, poll employees from different departments, who have different personalities and skillsets to ascertain which initiatives were the most and least effective from their perspectives. Use the space below to make notes and use the table on the next page to record your findings, insights, and reflections.

## Raise Awareness

Raising Awareness Initiative	Effectiveness - Per Employee Poll (1-10)	Ideas to Elevate Effectiveness or Abandon

## Raise Awareness

List current strategic initiatives that have no *Raise Awareness* component(s) and create ideas to address these missing opportunities. Note the two brain hemispheres in the light bulb icon; be both creative and analytical in this endeavor.

Initiative Needing Raised Awareness		Ideas to Address Missed Opportunities
		
		
		
		
		
		
		
		
		
		



## Educate

*Educate* opportunities (optional) and requirements (mandatory) generally necessitate more investment from employees than *Raise Awareness* strategies and less than *Action & Ownership* challenges and responsibilities. Employees partake in *Educate* opportunities via internal talent development, conferences, guest or keynote speakers, site visits, certification courses, degrees, professional coaching, and so on. While not a categorical difference, employees tend to be recipients of information with which they engage in *Educate* initiatives and they are drivers / creators / main actors in *Action & Ownership* initiatives (explained below).

List all educational opportunities offered to/required of employees in varying positions. Consider each opportunity; by what means could each be more closely aligned with organizational purpose and values, if at all?

Education Opportunity	Offered (O) or Required (R) to X Position	Ideas of How to Better Align with Organizational Values and Purpose

**Educate**

<b>Education Opportunity</b>	<b>Offered (O) or Required (R) to X Position</b>	<b>Ideas of How to Better Align with Organizational Values and Purpose</b>

## **Educate**

What percentage of your employees participate in educational opportunities? Does participation vary between regions, departments, ranks, et cetera? Draw on statistics or implement assessments, so you can do so in the future.

In what way(s) are educational opportunities integrated into systems (e.g., annual reviews, KPIs, promotions)?

## **NOTES**

## Action & Ownership

*Action & Ownership* initiatives are the most committing and hence are most effective when they are inspiring, values- and purpose-aligned, future-focused, hopeful, and/or creative in design and implementation. Examples include healthy competitions to advance strategy, hack days, personal challenges (e.g., cutting carbon emissions and/or waste at home), expectations for every employee to advance company purpose, in some way, from where they sit in the organization, et cetera

List the five most effective *Action & Ownership* employee engagement initiatives in your organization's history, which will likely involve a fact-finding mission and/or listening tour. If you're pressed for time, gather a few diverse employees and engage in a reflective/evaluative session. Add as much detail as possible to each initiative to garner insight into effectiveness.

1.

2.

3.

4.

5.

## Action & Ownership

What evaluative factors were/ought to be considered in reviewing the level of effectiveness of *Action & Ownership* initiatives (e.g., level of participation, contributions to driving purpose / strategy, contributions to employee recruitment and retention, employees' evaluation of initiatives, ROI)? Remember, "failing" can also be viewed as learning how something doesn't work, so apply lessons to future initiatives.

What do the Action & Ownership initiatives have in common and/or what makes them unique? Once you determine this, evaluate the effectiveness of commonalities, uniquenesses, and how might they be enhanced, adjusted, or abandoned.

## NOTES

# Tying It All Together



Appendix B offers a basic format for creating an employee engagement action plan; edit it to suit your needs, or create something new. Be sure to collaborate with key people and ensure that your action plan is a living document; update and edit it as appropriate.

If your organization administers employee engagement assessments and/or pulses, analyze results to garner insight into the effectiveness of your evolving employee engagement strategy and initiatives. If you don't administer surveys, then observe changes in retention/attrition statistics, as well as changes in the percentage of employees recommending your organization as a good place to work. (Many organizations ask applicants how they heard of the position, as part of the application process.)

Lastly, know that employee engagement is an ongoing pursuit, as new generations will have different needs and desires, the economy will affect your budget, external global circumstances will shift what's "normal", and so on. Note that employee engagement initiatives may look different for in-person, hybrid, and remote models - just as they'll differ across organizational cultures. So, continue to reflect, evaluate, tweak, and tinker in your pursuit to engage your most valuable asset. Doing so will serve the employee, the team, the organization, the community, and the marketplace.

## Conclusion



My optimism causes me to anticipate a time when we don't need to think about cultivating purpose-driven companies, nor about engaging employees, as these things will become the norm. If you desire employee engagement inspiration from diverse organizations, check out my book, *Organizational Heartbeats* (Routledge, 2020), which features four case studies.

Thank you for being forces for good in your organizations and in the marketplace. Continue to raise the next generation of leaders to do the same.

Please reach out to share your good work, questions, and suggestions:

<https://www.linkedin.com/in/brookemorán/>

# Appendix A: Values Clarification

While not always the case, those who live in integrity can articulate their top values, and they are intentional about living into their values. As such, this exercise is meant to help individuals identify their most precious values. It is important to note that this is not a test; the only “right” values are the ones that speak to you and help define who you are.

- Spend time thinking/journaling/talking about the following and jot down notes:
- What non-physical character traits and behaviors do you most admire about yourself?
  
  - Consider people you admire and respect; what non-physical character traits and behaviors most resonate with you?
  
  - What behaviors do you exhibit when you feel most/least like yourself and living in/out of integrity
  
  - What values were instilled in you through your parents, family, community, etc. that hold true and which ones are not central to who you are?



## Values Clarification

- Review two or more lists of values that you find on the internet; lists vary, so find ones that suit you.
- Create a list of your top 10 values. While it's important to have a general sense of what each value means (e.g., empathy versus compassion, peace versus harmony, integrity versus honesty), note that what it looks like will vary from person to person. For example, people exhibit gratitude and optimism differently, and spirituality comes in many forms. Filter through all of the values and consider which values you hold most dear; reflecting on how and how consistently you live into various values may help you decipher which ones make your top 10 list.

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.





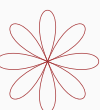
## Values Clarification

- Here's an even harder exercise than above: whittle down your 10 values above to your top 2-3 values. Which ones are part of your identity? Which values will allow you to be your best self? Note that some values might serve as an umbrella for one or more other values with which you resonate. For example, perhaps timeliness and accountability are two of your values, and you consider timeliness a critical part of being accountable, so you could choose accountability as one of your top two values. Not only does this make sense, but it's a nice work-around when trying to distill your list of 10 values to two!

List your top two values below, why they are integral to your being, and what other values might be incorporated into them.

#1:

#2:



## Values Clarification

- Have a conversation with your boss, colleague, partner, family members, and/or direct report. Share why these values are important to you. Ask about theirs. Perhaps even ask them to share with you if they observe you living out of your values.
- Observe your behaviors. Do you ever live out of alignment with your values? How does it feel versus when you live in alignment?
- Use your values to guide your behavior and your decision making. It's easy to live in alignment with your values when life is easy; check in with yourself when you're challenged. Here's an example, of which I am not proud. My top two values are empathy and authenticity. Empathy is about accepting other people's feelings. I am an empathy powerhouse; I have empathy for all kinds of humans and animals. For example, if someone acts in a way that is not particularly kind to oneself or others, I imagine how they were raised, or perhaps what kind of day they had, and I give them the benefit of the doubt. However, my empathy gets really challenged when someone pushes on some of my core beliefs, such as gender equity, treating animals with respect, protecting and caring for children, and the importance of mitigating climate change. When people blatantly disregard such things that I consider non-negotiable, I have a really hard time having empathy. I am a work in progress, as you may be. Keep at it!

## NOTES



# Appendix B: Action Plan

Strategic Objective	Engagement Initiative to Address Objective.*	Key Owners & Stakeholders	Due Date

\*Keep in mind the WHY, HOW & WHAT facets of purpose-driven employee engagement.

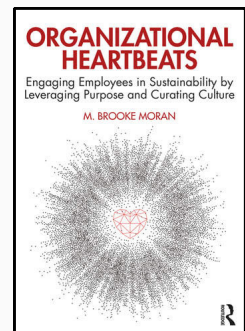


# About the Author

Dr. Brooke Moran specializes in elevating the effectiveness of purpose-driven individuals, teams, and organizations. She achieves this through executive coaching, designing and facilitating culture and leadership development programs, and employee engagement consulting, among other endeavors. She has done this on six continents in a range of environments, from conference calls to remote mountain glaciers, and from five-star resorts to executive education classrooms. Brooke has worked with executives from such companies as PwC, Microsoft, Cancer Treatment Centers of America, Schneider Electric, Hasbro, John Deere, UPS, the United States Navy, Ericsson, and Fidelity. She also works with non-profits and government agencies. She researches and writes thought leadership on purpose, sustainability, resilience, leadership and is the author of *Organizational Heartbeats: Engaging Employees in Sustainability by Leveraging Purpose and Curating Culture* (Routledge, 2020). She Co-Owns and is the Human Potential Catalyzer at Zen for Business, a Certified B Corp, which is in the process of rebranding, so be on the lookout!



LEADERSHIP CIRCLE | CERTIFIED PRACTITIONER



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