

How to Re-engage Your Team After a Pandemic

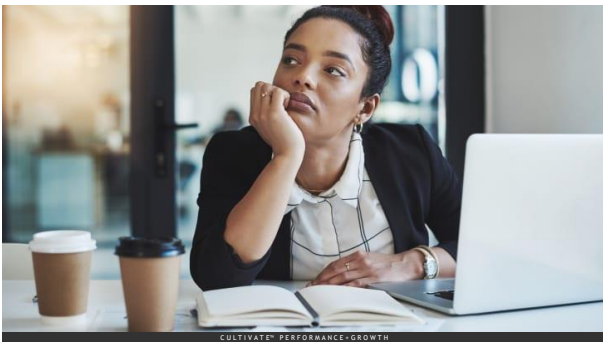
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Want to work in
office full time.

10%

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54%

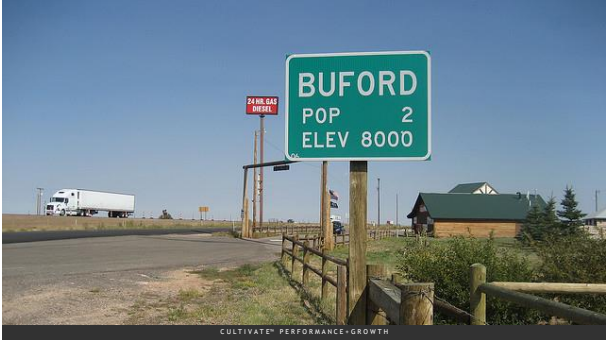
Prefer
hybrid work
arrangement.

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Would change
jobs if asked
to be in office
full time.

1 in 3

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Managers are vital
to your success!

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35%
engaged

13%
disengaged

52%
not engaged

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Engaged Team Members

1. Produce substantially better outcomes
2. Treat clients better and attract new ones
3. Are more likely to remain with their institution than those who are less engaged

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How to Transition and Increase Engagement

1. Care for them as people
2. Sustain personal element
3. Provide flexibility
4. Embrace fun



#1 Care for them as people

People who work
rather than
workers who happen to be people.

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50%

Employees
feeling
cared for.

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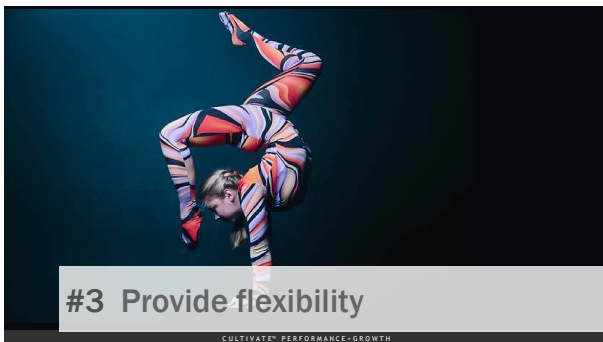
Reduction in
employees
feeling cared
for.

10%

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Ways to provide flexibility

- Relax dress code for front line
- Make Tuesday afternoon flexible
- Create a floater position
- Allow back office to work from home often

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Focus Groups



Manager



Employees

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Results from Focus Groups

1. Peer to peer communication
2. Growth
3. Relationships
4. Recognition

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What is Cultivate™

Cultivate™ is a unique process that pairs coaching and training with a digital tracking tool to *accelerate* the growth of your people and your institution.

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Activities

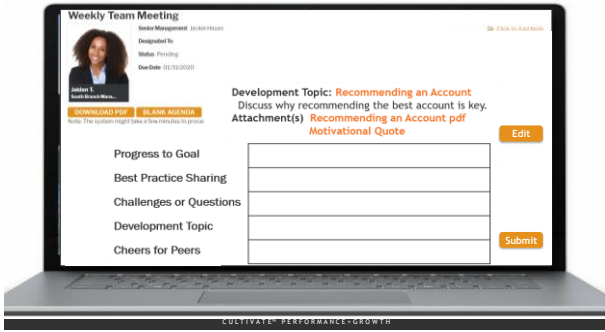
- Weekly Team Meetings
- Check-Ins
- Observation Coaching
- One to One Coaching

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Weekly Team Meeting

Weekly meetings drive Team Member recognition, education, communication and motivation.

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Progress to Goal	We've opened 33 personal accounts and 1 business account. I encouraged everyone to keep listening for opportunities.
Best Practice Sharing	
Challenges or Questions	
Development Topic	
Cheers for Peers	



Sample Development Topics

- How to greet clients
- Discussing products and services
- Making a warm referral
- Identifying business prospects
- Making clients feel significant
- Telephone etiquette
- Competition verses Us

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Check-Ins

Team Member and Team Leader meet as a pair to enhance the Team Member's growth, motivation and relationship.

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69%
work harder
when recognized

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Personal Update	Son starting college next week. Family is emotional.
Review Previous Action Plan	
Points of Pride	
Do Overs	
How Can I Help?	
Next Steps for Action Plan	

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Observation Coaching

Coaching
“in the moment”
is designed to
reinforce previous
training and refine
skill development of
Team Members.

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1 in 4
receive meaningful
feedback

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One to One
Coaching

Meetings between
Team Leaders and
Team Members
designed to
focus on growth
opportunities and
uncovering
additional potential.

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3x
more engaged

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What did you accomplish last quarter?	Learned how to open business checking accounts.
What are the most important things you will accomplish next quarter?	
What challenges are you facing?	
What can I do to best support you?	

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What we've learned.

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1. Reduced Turnover

Month	Turnover
January	33%
February	29%
March	24%
April	22%
May	17%
June	28%
July	28%
August	11%
September	6%

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2. Increased Satisfaction

10%

"My manager cares about me."

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3. Manager's Skills Improved

30%

"My manager holds my team accountable."

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3. Manager's Skills Improved

29%

"My manager is an excellent coach."

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Key Takeaways

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1. Hold Regular Team Meetings

- Weekly meetings are best
- Try Wednesdays as less people take that day off
- Managers would appreciate it if you provide an agenda and talking points
- Include an educational element

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2. Hold Individual Meetings

- Monthly meetings are best
- In person is ideal but via Zoom will work
- Help them feel appreciated and unique
- Ask questions before you provide solutions

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3. Provide Educational Opportunities

- Book club
 - *One Minute Manager* by Blanchard
 - *Three Signs of a Miserable Job* by Lencioni
 - *The Energy Bus* by Gordon
- Assign videos
 - Simon Sinek
 - Brene Brown

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What's can you start today?

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You can make a difference!

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Thank you!

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