

Employee Engagement Drives Client Engagement

By Eileen P. Monesson

According to Gallup's 2013 report entitled "State of the American Workplace," ineffective leaders cause nearly 70 percent of American workers to be "not engaged" or "actively disengaged" in their work, costing an estimated \$450 billion to \$550 billion in lost productivity annually. Nearly two-in-one workers are not reaching their full potential. Gallup's research shows that engagement is strongly connected to business outcomes essential to an organization's financial success, including productivity, profitability, and client satisfaction. Engagement levels have remained nearly consistent since 2000.

Engagement makes a difference to the bottom line. Gallup's research found that companies with engaged workforces have higher earnings per share (EPS) and seemed to have recovered from the recession at a faster rate. Organizations with an average of 9.3 engaged employees for every actively disengaged employee in 2010 and 2011 experienced a 147-percent higher EPS compared to their competition in 2011 to 2012. In contrast, companies with an average of 2.6 engaged employees for every actively disengaged employee experienced a 2-percent lower EPS compared to their competition during that same time period.

Drivers of engagement

Gallup's study found that organizations that actively engaged both their employees and clients experienced a 240-percent boost in performance-related business outcomes compared to organizations with neither engaged employees nor engaged clients. Great leaders express to their team how their actions affect the client experience and empower employees to do what is right for the client. Employees at these organizations buy into the company's purpose and know the importance of their role in the delivery of its brand promise. Despite that, Gallup's study found that only 41 percent of the employees surveyed felt that they know what their company

stands for and what makes its brand different from its competitors' brand.

Another study conducted by the Institute for Professional Excellence in Coaching (iPEC) found that employees with a high level of anabolic energy (*i.e.*, uplifting, empowering, constructive) were 93-percent more satisfied with their level of engagement at work and nearly 90 percent more satisfied with their leadership and communication skills. On the other hand, employees with high catabolic energy (*i.e.*, draining and destructive) reported only 13-percent satisfaction regarding their engagement level at work and 6-percent satisfaction with their leadership and communication skills. In order to make a sustainable change in workforce engagement, core energy (*i.e.*, the potential one has for success in life) has to shift from catabolic to anabolic energy starting with the company's leadership (see Monesson, CPA PRACTICE MANAGEMENT FORUM, March 2013 and August 2013). Gallup's research determined that managers who focus on their employees' strengths can practically eliminate active disengagement.

Core Energy Dynamics is used to understand what makes up an individual's energetic capacity, the dimensions involved in determining and creating engagement, and the interplay between these two factors that produces Total Engaged Energy—the energetic commitment that drives outcomes of sustainable change, maximization of current abilities, and achievement of success. Core Energy Dynamics provides the person with the tools to have more anabolic energy so he or she can focus on solutions instead of problems.

Everyone has both anabolic and catabolic energy and goes through different levels of energy throughout the day. Successful leaders know how to spend more time at an anabolic level to inspire, motivate, and get the most out of their team, while providing each person with a sense of purpose and value that

are necessary in engagement. They develop a leadership style that positively influences everyone in the company. These leaders have an awareness of how their anabolic or catabolic behavior affects employee engagement so that they can make a conscious decision to shift to a level that serves everyone better.

Assessments can determine one's leadership potential

There are two main types of assessments: personality and attitudinal. Personality-based assessments, such as Myers Briggs and D.I.S.C., are valuable tools that pinpoint certain personality types so that leaders can understand their strengths and weaknesses. By understanding their personality and how it relates to what they do, leaders can adapt their behavior to “work with what they have,” to function effectively.

iPEC developed the Energy Leadership Index (ELI) Assessment to measure how a person perceives and approaches work and life. The ELI is an attitudinal assessment, which is based on an energy/action model. This assessment differs from personality assessments because it is not intended to label a person and have them work within that label. Instead, it measures their level of energy based on their attitude, or perception and perspective of the world. Because attitude is subjective, it can be altered. By working with a coach using the ELI, a person can alter his or her attitude and perspective, make a shift in consciousness (*i.e.*, the level of one's self-awareness of realizing their true self as opposed to the self they have been “trained” to see and accept), and increase their energy and leadership effectiveness.

The ELI is a one-of-a-kind assessment that reveals what specific filters a person has developed and how those filters influence the results they achieve. It helps someone understand how different levels of energy appear in their home and work life; how their thinking or life situations can create stress and what can be done to reduce it; and uncovers internal energy blocks that are preventing them from success, happiness, and purpose.

The assessment measures a person's Energetic Profile, which is their energetic frame of reference. It is the filter, or lens, through which they experience the world in all its dimensions—spiritual, mental, emotional, and physical. The assessment also shows their energetic reaction to stress. This is important because recognizing their reaction to stress is the first step toward reducing the level of stress they experience. Both their Energetic Profile

and Energetic Stress Reaction are indicators of a person's current:

- potential leadership ability or the potential for people to motivate themselves and others to take positive, purposeful action and achieve success;
- level of engagement in life or how emotionally and intellectually involved they are in what they do and who they are with; and
- level of consciousness or awareness of who they are and what their life is about.

Emotional intelligence

Emotional intelligence (EI) can be defined as a person's ability to distinguish, understand, and have great awareness of how their thoughts and feelings connect with their outward actions and behaviors, as well as their ability to manage and express appropriate emotions.

Enhancing and developing a greater awareness and application of the elements of EI will have a significant effect on all aspects of a person's life, including increased awareness of, and relationship with themselves, as well as improved relationships with co-workers, friends, family, and others that are significant in their life. People who improve their EI capabilities are able to decrease stress—personally and professionally, enhance interpersonal relationships, and demonstrate greater leadership and decision-making skills. More importantly, increasing EI has a direct and positive effect on a person's level of consciousness.

EI is a vitally important dimension of awareness for leaders. Continually working on developing a leader's EI will help them, and their team, to become more successful.

E-Factor

The ELI assessment produces a numerical value referred to as the E-Factor or the person's Average Resonating Level of Energy. Knowing a leader's E-Factor and what to work on to increase it can have a tremendous effect on employee engagement. For example, shifting a person's E-Factor from 2.5 to 3 will result in a:

- 9-percent improvement in communication;
- 10-percent increase in self-described leadership ability;
- 12-percent greater feeling of engagement at work;
- 15-percent more satisfaction in relationships;
- 15-percent improved satisfaction in work-life balance;
- 16-percent increase in productivity;

- 17-percent improvement in time management;
- 20-percent increase in financial success; and
- 20-percent increase in overall combined energy level.

Coaching leaders

Gallup's research found that managers are primarily responsible for their employee's level of engagement. Having leaders work with a professional coach can improve their management skills. Coaching is an established relationship between a client and the coach where key objectives are identified and achieved through regular, focused contact. This is done by facilitating open and thoughtful discussions wherein the coach asks powerful questions and challenges the client to achieve results. The coach can help the client achieve goals more quickly by holding the client accountable for his or her behaviors and actions. The purpose is to push the client to higher levels of anabolic energy, success, performance, and greater contributions to their organization.

Though a collaborative partnership, a coach will help clients to:

- think bigger, smarter, or differently;
- establish better goals and reach them;
- accomplish more than they would have done on their own;
- communicate more effectively and confidently;
- have the tools, support, and structure to accomplish more; and
- break through any barriers that hold them back.

As a result, the clients will:

- better understand what will help them to improve their personal performance;
- build their leadership competence in the organization and with management, peers, and direct reports;
- develop respectful and caring relationships with others;
- resolve personal and professional concerns linked to job performance and organizational goals; and
- understand theories and models behind creating success and how to use them.

Conscious firm

In the book, *CONSCIOUS CAPITALISM: LIBERATING THE HEROIC SPIRIT OF BUSINESS*, by John Mackey, Co-CEO of Whole Foods and Raj Sisodia, Harvard Business Review Press, Mackey makes a case that "a business should start with its purpose and its values and use them to inspire employees to be innovative and provide superior service,

Twelve Tips to Increase Engagement

The following tips will help to align employees with your firm's strategies and goals:

1. train everyone on your firm's purpose, mission, and vision;
2. ensure that everyone understands exactly what is expected;
3. regularly reinforce how important each team member is to the success of the firm;
4. design "client experiences" so that every team member delivers consistent encounters;
5. recognize employees for "living your firm's brand";
6. coach leaders to focus on team members' strengths;
7. nurture a culture of collaboration;
8. focus on solutions instead of problems;
9. empower team members to take ownership of client relationships;
10. communicate successes throughout the firm;
11. make leaders and employees accountable for their actions and reactions; and
12. be positive in employee and client interactions.

while creating sustainable increases in revenues and profits. This approach provides the basis for ongoing investment in the business, while creating lasting value for shareholders and stakeholders—leading to a virtuous circle."

A conscious firm aligns its purpose and value with the firm's mission. As defined in *CONSCIOUS CAPITALISM*, "purpose refers to the difference a company is trying to make in the world, mission is the core strategy that must be undertaken to fulfill that purpose, and vision is a vivid, imaginative conception or view of how the world will look once your purpose has been largely realized." Most firms develop a mission and vision statement, but few define their purpose. Doing so will clearly communicate to both employees and clients why your firm is in business. For example, your firm's purpose could be to provide entrepreneurs with the tools and resources to grow their business. If that is the case, everything that your firm did would be focused on this purpose. It would be very clear to your team that it needs to provide much more than a tax re-

turn, a compilation, or an audit to its clients. The firm would also need to include client-specific information, such as benchmarking data, a vital signs report, industry trends, and management tools to assist the client with making the right business decision. This brings value beyond accounting to the relationship and strengthens the firm's role as the trusted advisor.

Win-win

Clearly communicating your firm's purpose and the required steps to accomplish its goal will engage employees and make them feel like they are part of the team. Using the example given above, if your employees know that your firm's purpose is to provide entrepreneurs with the tools and resources to grow their business, everything employees do will be focused on that goal. Staff members will go out of their way to find the tools that their clients need to be more efficient and profitable. They would understand what type of value-based information to send to clients, such as articles on becoming lean, suggestions on how to become more efficient, resources to better understand their financial position, and information on industry trends. These team members will focus their day on delivering the WOW factor. Everything that your employees do will be focused on providing optimal client service.

Engaged employees are more innovative and client focused. Gallup found that the 30 percent of the workers that are engaged in their work drive innovation, growth, and revenue at their firm. They are also more likely to embrace their jobs at a higher level and know the value they bring to the firm. Instead of looking for problems, engaged employees discover and deliver solutions (see sidebar).

In today's competitive environment, firms need to focus on their people. Clients buy their expertise. If you can tap into employees' emotions and guide them to be more engaged, both employee and client satisfaction will increase. After all, happy employees make happy clients.

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