



MANAGERS' GUIDE

Progress as a Team With Well-defined Goals
and a Cohesive Strategy

+ USER GUIDE



The Amélio platform provides a comprehensive overview of your team's engagement level. You can obtain your employees' perceptions and concerns about their work environment at a glance, helping you prioritize what needs improvement.

The following guide provides tips and best practices for analyzing and interpreting your survey results and advice on following up on your surveys with your team. You will also find a handy checklist for your next follow-up meeting at the end of this document!

Are you ready to get started? Let's go!



Are you a first-time Amélio user interested in knowing more about employee engagement? Or would you like to learn more about engagement factors?

It's really easy: read our appendices to help you get started smoothly.



Reminder:

Such an engagement process is not a tool for evaluating your performance as a manager!

It is about identifying the best actions to keep your team motivated and enabling your employees to perform to the best of their abilities while helping you in your work.

Help transform your organization into an inspiring and satisfying workplace, one step at a time.



TABLE OF CONTENT

01**Analysis Tips and Best Practices****P.03****02****Results Presentation****P.08****03****Discussing With Your Team****P.10****04****Results-Based Actions****P.12****05****Manager's FAQ****P.15**

APPENDICES

**A****Employee Engagement Level****P.19****B****Understanding Engagement Factors and Sub-Factors****P.20****C****Presenting Results Effectively: Your Guide to Success****P.21**

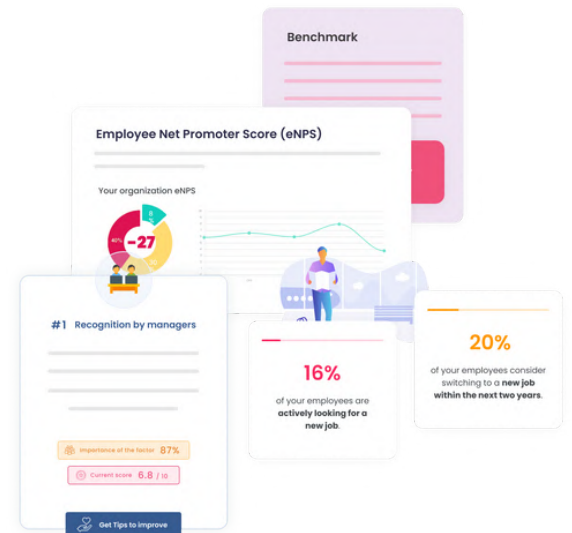
Analysis Tips and Best Practices

Here are some tips and best practices
for analyzing your team's results.

1. Go to the "Overview" Tab

This tab features the survey results of your immediate team and any other employees under your supervision, depending on your hierarchical structure.

Pay close attention to the overall **Engagement Level** and **Engagement Factors** and **Sub-Factors** results.



Are you observing extremes between the highest and lowest results?

Or are you observing a mid-range trend and relatively similar results for each of the 12 factors?

These initial observations will help you understand the overall engagement result. **This tab also features a "Summary" display, highlighting the main strengths and concerns identified within your team, and a "Trend" display, illustrating the Engagement Level over time.**

2. Go to the "Segments" Tab

If you manage a large team, you can display the results based on the groups you are authorized to access. To do so, you can use the "Segments" tab.

Groups examples:

The groups available on the platform will differ according to your organization's needs, but here are a few examples of segmentations that might be worth consulting:

	Heatmap				
	Response Rate	Career opportunities	Recognition	Feedback	Wellness
Marketing	88%	8.0	7.2	6.0	8.0
Customer service	45%	3.7	6.4	7.6	4.0
Finance	86%	9.8	8.4	7.8	7.5

Department

Seniority

Age Group

Job Title

Employee Level

For example:

Do newly-arrived employees feel they will experience an interesting career progression within the company, while more experienced employees feel their progress is hindered? Is there a difference between groups as to how much recognition they receive?

Identify the exact strengths and weaknesses within each group through comparative analysis. Review the results by clicking the factor header to explore the associated sub-factors.



Reminder:

"Insufficient respondents" will be displayed if the confidentiality threshold is not reached for any given group (i.e. five or more respondents).

3. Use Filters

The filters at the top of each "Results" page allow you to customize and refine your data and filter the results by survey, period, or the different segments available within your organization.



4. Identify Where You Can Make an Impact

Employee engagement's responsibility is shared throughout the organization. However, managers like you can quickly impact the Relationships and Recognition engagement factor groups, as you can personally witness the daily sources of employees' frustrations, thus allowing you to address any issues as they arise promptly.

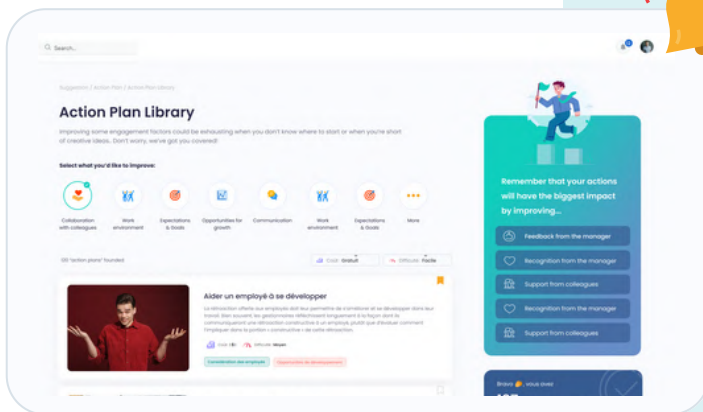
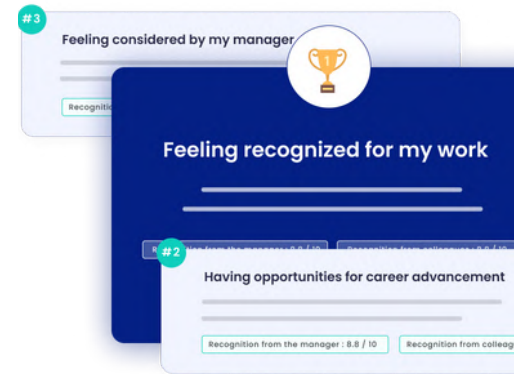


Reminder:

Employees are concerned about this work environment subject for a specific factor when all its sub-factors have low scores.

When analyzing and interpreting your team's results, you can try to identify where and how you can make a difference:

implement a simple action within the team, start a discussion on an irritant, report frustrations to management or human resources, etc.



Reminder:

Implementing any improvement action doesn't necessarily require complicated procedures or much time. Sometimes, mentioning an issue during a meeting shows that the problem has been acknowledged and considered. For ideas on inexpensive and easy actions to implement, visit the Action Plan section on your Amelio platform.

5. Compare Scores Through Time

Sending a survey through Amelio is the first step of a collaborative change process. With Amelio, your organization has initiated an engagement improvement process—as the name implies in French, the goal is to "s'améliorer" (improve)! 😊

Hence, the "Comparison With Previous Period" option allows you to monitor results over time and assess the impact of the various actions you implemented.

You can then compare different periods for a particular factor, an engagement sub-factor, or a specific survey question.

Are there any factors for which the score has improved? Or for which the score has decreased?

6. Analyze and Take the Time to Respond to Employees' Feedback

*Your organization may not have enabled the feedback option for managers.

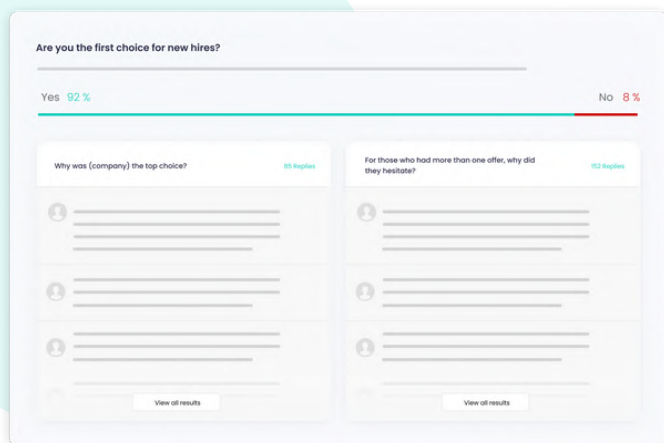
Employees' comments and feedback may provide valuable information and suggestions for solutions, so we recommend reviewing and classifying them.

Using tags, you can pinpoint which comments need to be discussed with your organization's human resources department or which problem-solving ideas you would like to work on with your team.

Do you need further information, or have you received a comment addressing a sensitive topic that may require your response?

Do not hesitate to use our reply-to-comments option! You can initiate a discussion with a specific employee while respecting their confidentiality and anonymity.

Opening up a dialogue allows you and your team to create an inspiring work environment for everyone while working together to find innovative solutions.



Reminder:

You do not necessarily need to reply to every comment! For some examples of replies, see our [Manager's Guide - Answers to Comments](#).

Once all results have been analyzed and interpreted, planning a team presentation is the next step.

* For a stress-free team meeting, we have prepared an exceptional checklist to guide you through it. See Appendix C!

Results Presentation



A common mistake you might make is to interpret the engagement survey results on your own and assume what your employees were thinking when they filled out the survey.

Survey results should be presented to your employees, as they should be allowed to express their opinions, provide additional information and contribute to identifying solutions that could be implemented as the situation evolves.

Therefore, it is essential to have regular meetings to present the survey results and monitor the improvements made along the way. At the beginning of the survey process, schedule some extra time with your team to show them the results.

Be as transparent as possible with your employees. Use the platform for direct consultation, if possible.

Avoid presenting comments written by team members. If they manage to identify between themselves, they could be less honest in their following answers or even lose confidence in you for divulging this information, especially if the current work atmosphere is already volatile. Comments help your results' interpretation and should always be treated confidentially.



Tip:

To hide all comments during your presentation, click the "Filters" tool and select the corresponding option.

Be sure not to refresh/reload your browser page during the presentation to avoid losing the option to hide comments. Suppose you cannot present the results directly within the platform—in that case, you may wish to prepare a short presentation or a customized report page for your team.

Discussing With Your Team

One of the objectives of presenting the results is to create a continuum between what employees say and how you address their concerns and to solicit their reactions, opinions and impressions.

Highlight Strong Elements

Your team appreciates some aspects of their work environment, and these factors help keep them motivated daily. Hence, it's essential to highlight them and understand why these factors stand out to keep doing things right. You could ask your employees what motivates them most about these successful factors and explore how to maintain or reinforce these good practices. As a group, ask yourselves, "What would be the next thing we could do to go above and beyond expectations?"

Identify Where Improvements Are Needed

Explore the areas for improvement with your team. Before implementing any action plan, it's essential to understand the factors or statements on which employees have been most critical. Begin by assessing whether the areas needing improvement really reflect what the team thinks are the most critical priorities.

Are these the factors on which we should be focusing right now?

Explore together how you can make a difference and involve your employees in finding solutions that are relevant and valuable to them.

Concept of Importance :

When set up in your organization's Amelio account, the concept of importance highlights the engagement factors that are most important to your employees based on their results.

It ensures that you invest your efforts where it really matters and where they can most effectively positively impact your team.

Some Tips for Establishing a Trust-Based Climate

- Be empathic and emphasize the importance of listening to and respecting their feelings.
- Value and encourage diversity of opinions.
- Be humble and seek constructive feedback.
- Ask everyone to be in "solution" instead of "criticism" mode.
- Show how important it is for you to understand their perceptions and act accordingly.
- Be open to new ideas and changes.
- Do the presentation in a less formal, more relaxed setting.
- Choose the right time according to the team's schedule and workload.
- Use humour to lighten the mood.
- Act concretely on the ideas proposed, and follow up regularly.

Psst... Is the Innovation module of the platform enabled? If so, you may find there some interesting suggestions or leads to solutions. Do not hesitate to consult them!

Not sure how to use this module? Here is [an article](#) where you can learn more about it!

Results- Based Actions

Employees who can participate in implementing action plans feel responsible for their success.

Identify Together Which Factors Are Most Important to the Team

Work together to identify which factors deserve more attention, and take this opportunity to pinpoint one strength on which you should also focus. This action plan could include ideas for maintaining and improving strengths. This practice motivates the team, as these actions go beyond expectations and highlight the positive aspects of the work environment, thus reminding employees of what they value most about the company and their team.



Identify Together the Most Realistic Solutions

The key is to focus on actions that can be implemented quickly and ideally without incurring costs. Work together to establish a timetable for implementing these actions and distribute responsibilities within the team. This is not your sole responsibility, and the more employees are involved, the more they will be committed to the action plan's success.

Regularly Follow Up on the Action Plan

In between surveys, follow up on the progress of the action plan. For example, you may wish to schedule a 5-10 minute discussion point during your meetings to discuss it. Use the most appropriate means to monitor progress according to each action plan.



Recap The Initiatives That Have Been Implemented

When presenting your subsequent survey results, start by recapping the initiatives already implemented. The key is emphasizing that you are acting on their concerns and that changes are happening. Ask your employees to comment on these changes and to share their opinions on new practices so that these can be maintained or improved.

Set Yourself Personal Goals

While improving engagement levels does not solely depend on you, you do play an important role. To further improve engagement levels, set a personal goal that demonstrates you care about the work climate and play an active role in this ongoing improvement process. The automated reports will provide several ideas for actions you can undertake that will positively impact your team's engagement levels.



MANAGER'S



FAQ





WHY IS IT IMPORTANT THAT I SHARE THE RESULTS WITH MY TEAM?

Employees complete surveys and express their concerns, dissatisfactions or worries through their submitted scores and comments. Discussing these issues with your team reinforces the trusting and collaborative relationship between your team and you.

Presenting survey results demonstrates that you care about your role and your employees, aiming to improve their work experience and satisfaction.

Conversely, not following up on engagement surveys could affect your employees' perception of your leadership and credibility if they perceive that critical issues are not being addressed by their manager, for example.



WHAT SHOULD I DO IF THE LOWER SCORES DIRECTLY CONCERN ME?

Receiving criticism and negative feedback on your role as a manager is not always easy!

Discussing this with your team takes a lot of courage and humility. Still, they will understand that you are trying to improve your management style so that they can perform their job better.

It is important to challenge yourself and ask yourself how to support your team better, so they perform effectively and are motivated daily.



WHAT SHOULD I DO IF THE LOWER SCORES ONLY CONCERN MANAGEMENT OR HR?

If you have no control over the issues that are really important to your employees, discuss these issues with them nonetheless. Your role is to understand their concerns and relay the information to the right people.

Explain upfront that you may not be able to do anything about these issues immediately but are committed to relaying the information, following up with the relevant people, and keeping your team informed.





CAN I KNOW WHO RESPONDED WHAT?

No. The confidentiality threshold is five or more respondents per question to provide anonymized results, and this also applies to segmentation according to specific attributes, such as age or seniority.

However, it is possible to have suspicions about who might have written a comment (e.g., the employee has given someone's first name or referred to a situation you are familiar with). If this happens, be cautious when discussing the results as a team so that the employee is not personally targeted. Do not discuss the comment directly with the employee. Treat the information as confidential and refer to human resources if necessary.



HOW TO USE COMMENTS?

Comments are additional information designed to help you interpret the results. You must treat this information as confidential. Avoid presenting comments written by team members to employees to avoid them feeling targeted or being identified among themselves. When reviewing comments, observe changes over time and recurring patterns to understand the general trend. Summarize the general ideas and concerns addressed in the comments when presenting your results, and validate your interpretation before drawing any conclusions.



HOW CAN I IMPROVE OR MAINTAIN A GOOD SURVEY PARTICIPATION RATE?

Employees will be motivated to complete surveys if they understand why they are doing so. Include discussions about motivation and job satisfaction in your daily management. Communicate the process beforehand and show that you value your employees' opinions.

Explain that you are committed to reviewing the surveys' results with them so you can together define action plans to improve what really concerns them.

When employees perceive that surveys or initiatives are taken seriously and that concrete action will follow, they will honestly say what they think and get more committed to supporting a genuinely collaborative approach.



APPENDICES

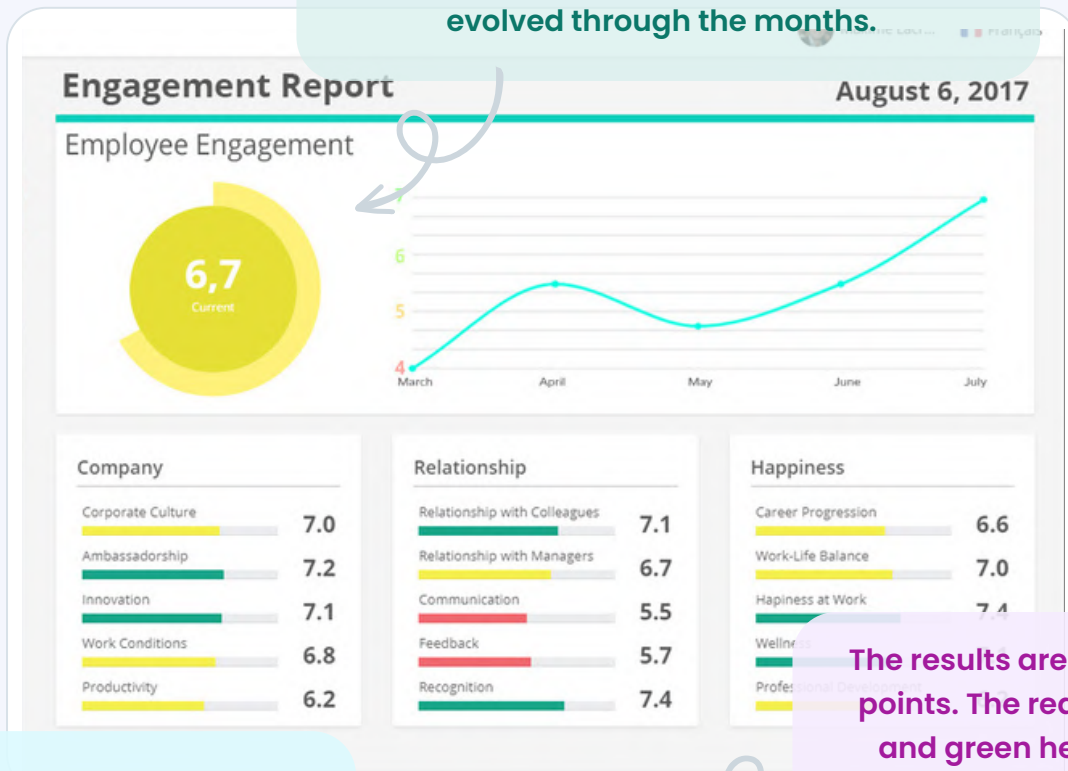
Appendix A

Employee Engagement Level

Remember that your organization has implemented an ongoing survey initiative to help you monitor your team's pulse and better understand your employees' needs. This initiative lets you closely monitor your team's satisfaction levels and morale as changes are implemented. Results provide you with a continuous snapshot of your team's engagement.

These surveys measure your employees' perceptions and concerns about their work environment and help you understand what should be your priorities when it comes to improvement.

Engagement Level is the overall result calculated for your team. The trend line shows how the Engagement Level has evolved through the months.



Each survey question is associated with one of **38 important sub-factors** of employee engagement. These key elements are grouped under **12 main factors**.

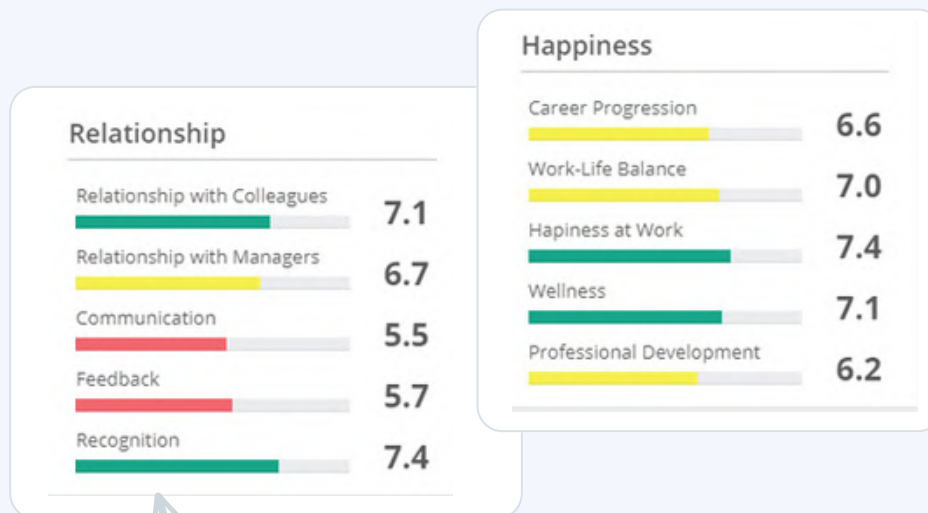
The results are out of 10 points. The red, yellow and green help you quickly pinpoint your team's strengths and weaknesses.

Appendix B (next page)

Appendix B

Understanding Engagement Factors and Sub-Factors

The **12 factors** represent the global aspects of employee engagement. These factors provide an overall portrayal of employee engagement. A sub-factor combines several questions on a specific theme, which helps explain and interpret the results.



For example, the "Relationship with Colleagues" factor combines "Collaboration", "Social Support" and "Work Support". These three latter sub-factors help understand and explain the results obtained for the "Relationship with Colleagues" factor, which influences engagement.

Using the same example, the result for the **"Relationship with Colleagues" factor is 7.9 out of 10**. Clicking on this factor reveals that collaboration between colleagues is problematic, while the other two sub-factors score well.

The "Segments" tab can also help you view the results per factors and sub-factors and identify issues that deserve more attention. For example, for Jean Tremblay's teams, the "Segments" tab highlights a low collaboration between coworkers in the Finance department. Compared to the other sub-factors of "Relationship with Colleagues," collaboration deserves more attention.

For the complete list of Amélio's engagement factors and sub-factors, [click here!](#)

Appendix C

Presenting Results Effectively: **Your Guide to Success**

Here are some ideas for your next meeting where you will present the results of an engagement survey—you can adapt them to your team's needs!

Remember: if this is your first results presentation meeting, schedule a little more time, based on your schedule and everyone's workload.



**For the user guide,
see the next page**



**To download the user guide,
[click here](#)**

PRESENTING RESULTS EFFECTIVELY

YOUR GUIDE TO SUCCESS

1.

Thank employees for completing the survey and remind them of its objectives



- ☐ Highlight how the engagement process can benefit them daily and how important their opinion is to you.

2.

Announce the meeting's objectives



- ☐ Present the results of the team engagement survey, including strengths and topics requiring improvement.
- ☐ Discuss with your employees about these results.
- ☐ Identify which engagement factors are most important for your team.
- ☐ Discuss possible solutions to be implemented.
- ☐ If this is a follow-up meeting: follow up on solutions that have been implemented.

*Promote an informal, empathetic, solution-oriented atmosphere, and remind your team of this whenever necessary.

3.

Present **survey results** using the platform, if possible



- ☐ Hide comments when navigating through the platform to ensure confidentiality.
- ☐ Present your team's strengths:
 - ☐ What is particularly appreciated?
 - ☐ Invite employees to comment on the scores:
 - How do you feel? Do you agree or disagree with these results? Are you surprised? Curious? Happy? Reassured? Proud?
 - Would you like to add an explanation/example/comment?
 - How could we retain these strengths? How could we go further?

Nobody speaks? Don't panic!



Let employees reflect on the results. It may take them some time. Still nothing? Here are some tips:

- Add a touch of humour. "Wow, I can see you have much to say 😊."
- Invite someone who doesn't often speak to respond (make the silent ones talk).
- Talk yourself through your emotions or the results' impact on you. By setting an example, you can influence your team.
- No luck? Move on to the next point or ask a new question. Maybe they will have more to say later. 😊

- ☐ Present your team's weaknesses:
 - ☐ What can be improved? What did you learn from analyzing the results?
 - ☐ Invite employees to comment on the scores:
 - Are you surprised? Disappointed? Sad? Angry?
 - Would you like to add an explanation/example/comment?
 - ☐ Ask them what they think are the most important issues to work on.

Are things getting emotional? Are spirits heating up? Is there something uneasy about the situation? Mention it!

And never hesitate to redirect the conversation back to your meeting's objective: to identify easy-to-implement solutions for improving the work environment within your team.

If a private exchange with an employee is necessary, tell them you will happily resume your discussion privately.



4.

Discuss possible solutions

- ☐ As a team, prioritize what needs to be improved:
 - ☐ On which engagement factors should we focus?

- ☐ Invite your team to propose realistic solutions that can be easily implemented:
 - ☐ What are the advantages/disadvantages of these solutions?
 - ☐ Are there any related costs?

If you have an issue for which you do not have a solution, or if you are unsure of its feasibility or need to discuss it with human resources or management—no problem!



Let employees know that you will look into it and get back to them as soon as possible with further information.

5.

Select actions to prioritize

- ☐ What steps are required to implement this solution? Can a timetable be established?
- ☐ What are everyone's responsibilities?
- ☐ What are the monitoring targets?

6.

Follow up on actions taken (if applicable)



- ☐ Identify actions and assess their progress to evaluate their implementation:
 - ☐ What worked well and what didn't?
- ☐ Discuss these actions' impacts:
 - ☐ Do these actions meet the needs previously identified as priorities?
- ☐ Determine the next steps:
 - ☐ Do we want to maintain them/adjust them/end them/etc.?

7.

End the meeting



- ☐ Thank your employees once again for their involvement.
- ☐ Indicate when the following survey (if applicable) or your subsequent follow-up on results and actions will occur.