

LEADERSHIP TOOLKIT

# TRANSFORM FEEDBACK INTO ACTION: ENGAGE STAKEHOLDERS BY “ROLLING OUT” RESULTS

*Melissa Matarazzo, Ed.D.*

Healthy organizations consistently monitor critical data like the engagement of staff and satisfaction of internal and external stakeholders. Often this is accomplished with the use of surveys administered to stakeholders of the organization. The key to these surveys is not the data itself. The key is how well leaders *share the data* with their staff and stakeholders and how well leaders *communicate the action* that will be taken based on feedback from the survey data. This transparent communication process is what we call “**rolling out**” results.

*The better we communicate the results, the greater the opportunity we have to create a team approach to problem-solving.*

**QUINT STUDER AND JANET PILCHER**

*Maximize Performance: Creating a Culture for Educational Excellence*

This toolkit focuses on the rollout process after a survey is completed which is critical to achieving improvement in stakeholders’ experiences. Embarking on the rollout process requires leaders to act with courage, humility, and genuine curiosity. Developing leaders to demonstrate these characteristics will foster the most powerful opportunities for improvement. With the right mindset as you approach the rollout, you can strengthen organizational culture through the process **and** as a result of the next actions selected. This makes the rollout process a “double strength” tactic with high potential for your organization’s continuous transformation.

As leaders move from survey feedback to action, these other toolkits will be helpful in communicating about and executing on the feedback gathered through the survey process:

**Communicate With Greater Clarity:  
Leveraging the Execution Triangle**

*Dr. JoAnn Sternke, Studer Education Coach*

**Return to Learn: Organizational Excellence  
Execution and Improvement**

*Dr. Janet Pilcher, Studer Education Coach*

**TOOLKIT OVERVIEW**

This toolkit is divided into three sections, providing guidance about how to prepare for a rollout (**Section 1**), what to do during a rollout meeting (**Section 2**), and how to ensure action and communication occur after the rollout meeting (**Section 3**).

When the survey is complete and the data have been collected and analyzed you can begin the rollout process. The steps of the process are:

**SECTION 1  
Prepare for the  
Rollout**

- **Step 1:** Train leaders on the rollout process
- **Step 2:** Executive leader communicates the rollout process and timeline

**SECTION 2  
Host Rollout  
Meetings**

- **Step 3:** Leaders roll out results to all stakeholders
- **Step 4:** Stakeholders evaluate rollout meeting

**SECTION 3  
Take Action and  
Communicate**

- **Step 5:** Leaders develop and communicate action plans
- **Step 6:** Leaders celebrate wins and communicate progress

## Prepare for the Rollout

### STEP 1: TRAIN LEADERS ON THE ROLLOUT PROCESS

A successful rollout depends on your planning and preparation. Once the survey is complete and the data are collected, train all leaders on how to explain the results of the survey and facilitate the development of an action plan based on the priority areas identified in the rollout meeting(s). This toolkit provides excellent content for the training session.

*Inconsistent and optional training = inconsistent and optional results*

QUINT STUDER

Leader training is important to the success of the rollout process to ensure consistency across the organization. The development of key words in advance of the rollout process will prepare leaders to frame the discussion of the data in a positive way that leads to continuous improvement. When you have the proper training in using key words during the rollout process, stakeholders are more willing to listen, provide input, and take part in improvements.

For example, key words a principal might use about parent satisfaction survey results might include:

*On [date] the Parent Satisfaction Survey went to all parents of the [school district]. Parents answered 17 questions about how satisfied they are with the school and their child's learning at the school. XX% of our parents completed the survey.*

*I appreciate your being here today to discuss the results and your continued participation in the process as we develop a plan to help us improve the experiences of our parents at our school. The goal of the survey was to determine how satisfied our parents are with their treatment and the treatment of their children at our school.*

*We kept this a confidential process by using an outside firm to facilitate the survey process. They implemented and monitored the survey and gathered the data. We did not see a single response, only the results in statistical form.*

*I consider the results of this survey the report card for our school. It is our responsibility to provide a great place for students to learn and parents to send their children for a good education, and I hope you will help me be responsive to their needs.*

### STEP 2: EXECUTIVE LEADER COMMUNICATES ROLLOUT PROCESS AND TIMELINE

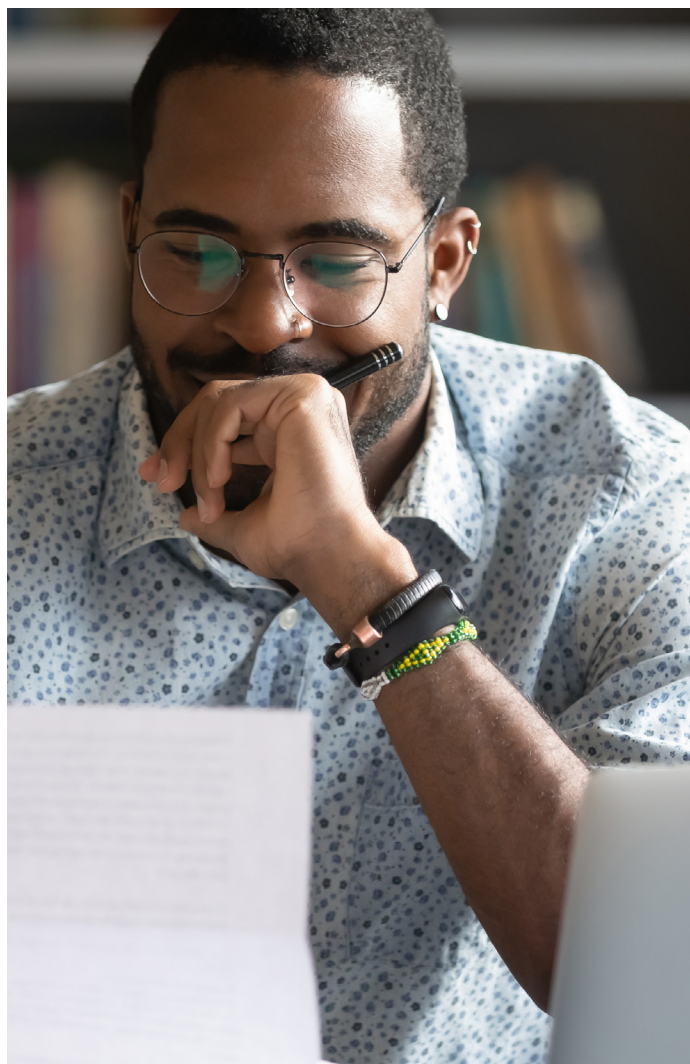
As an organization's executive leader, you should be involved as this process begins to show your support of the survey process as well as its importance to the organization. Before next level leaders (supervisors, managers, team leaders) roll out their results, the executive leader begins by rolling out the overall results to the senior team and all leaders.

The executive leader will communicate the steps that will be taken by each leader in the rollout process. This demonstrates executive sponsorship as a visible part of the process and sets all other leaders up for success. Leaders also use video, podcast, email or other methods to preview information concerning the rollout process for each organizational location and stakeholder group.

**Tool A** (see appendix) provides a template for a written communication of this information.

Key items to include in this step include:

- Purpose of the survey
- Organizational participation and overall results
- Timeline for rollout process
- What stakeholders can expect in the rollout process



## Host Rollout Meetings

### STEP 3: LEADERS ROLL OUT RESULTS TO STAKEHOLDERS

Once the executive leader has introduced the rollout process, next level leaders should schedule meetings with their stakeholder groups to roll out the data. Ideally, all stakeholders are invited to attend the rollout meetings, and more than one meeting could be scheduled to include as many individuals as possible. If the rollout is being done during a regularly scheduled meeting, multiple meetings may not be needed. **Tool A (see appendix)** offers a sample memo to a staff group about participating in the rollout of employee engagement survey results.

Make decisions about the type of meeting, the number of meetings and how you want stakeholders to provide feedback. You can meet with large groups or small groups can work separately in a large group and then you facilitate a report-out. Prepare to use 3x5 cards or sticky notes to have individuals who do not want to speak out provide feedback and input. Think about what will work best with your stakeholders and the organization of the session that will allow people to provide the best input to ensure continuous improvement.

Before starting the meeting, take some time to prepare mentally for the rollout meetings. The discussions at these meetings are not personal; rather the information from these meetings should inform your practice and point you in the direction of continuous improvement. Prepare yourself by thinking proactively:

#### Reactive

- Kill the messenger
- The data must be wrong
- It's not my fault
- I can't believe they think I am this bad
- People just don't understand
- If someone is unhappy it's because they choose to be – I can't control that!

#### Proactive

- Willing to hold up the mirror
- This is an opportunity to improve leadership skills
- I'm not perfect I can always get better
- Collaborative team effort will improve satisfaction
- Fixing perceptions and processes will improve satisfaction

Communicate “why” you are holding the meeting. Sample statements include:

- *Help me understand, what specifically did you mean when you scored the item...?*
- *I do want to tell you that I'm committed to making this a better school and to being a good leader. I hope you'll help me...*
- *Our organization is committed to providing leadership training in areas that are scored lowest on the survey. Your input will help provide more specific feedback on how I can improve as your leader. This is my goal—to improve as a leader.*

As a leader, it's particularly difficult to roll out unfavorable results. Sample key words used by a leader with negative results on an employee engagement survey might be:

*The survey results are back. Thank you for completing the survey. I want to tell you that I am disappointed in the results. I am not the leader that I want to be. But I want you to know that I am committed to being a good leader. I need your help to improve and become the leader you deserve and the one I want to be. I am committed to making this the best place for you to work. I hope you will help me be the leader I want to be.*

Remember the key is not just to present the results, **but to allow stakeholder involvement in the discussion of the results.** This is your opportunity to facilitate the conversation and allow the group to identify priorities and strategies for reaching the priorities. Please keep the following in mind:

- Avoid debating the data
- Listen, probe, listen
- Ask open ended questions
- Allow silence
- Encourage everyone to participate
- Do not agree to anything until you are sure you can do it

*In the process of having more candid, mutually respectful conversations, your team will become more cohesive and able to work together more powerfully.*

PAUL AXTELL

The steps for a successful rollout are:

1. Invite team members to the Survey Results Roll-Out Meeting.
2. Introduce and set up the meeting.
3. Present overall organizational results, including 3 highest and 3 lowest scored items for the organization.
4. Present the results from your unit reports.
5. Engage your team in a conversation about the results, including the 3 highest and 3 lowest items or the results that show the biggest increase or decrease since the survey was last administered.
6. Select an area to work on, ask for possible solutions, and then prioritize the one or two solutions to focus on.
7. Close the meeting by thanking your team, summarizing the meeting, evaluating the meeting, and identifying next steps.

#### **STEP 4: STAKEHOLDERS EVALUATE THE ROLLOUT MEETING**

**By asking employees to evaluate the rollout meeting, you will accomplish three objectives:**

1. Hardwire the rollout process by holding leaders accountable.
2. Provide stakeholders an opportunity to share additional feedback about the process from which the leader can learn.
3. Monitor the success of the leader in the rollout process so the leader's supervisor can provide additional coaching as needed.

At the end of your session, distribute an evaluation form **(Tool B)** (see *appendix*) to each participant to measure the effectiveness of the session. You may choose to leave the meeting setting and ask that the evaluations be placed in a sealed envelope and sent to your office.



## Take Action and Communicate

### STEP 5: LEADERS DEVELOP AND COMMUNICATE AN ACTION PLAN

Once agreement about the top opportunities for improvement has been reached and strategies to improve these areas identified at the rollout meeting, you will determine the highest priority action items (select 1 or 2 only) and place the items and actions in a written action plan to be implemented over the next 30-90 days.

Set a goal of improving **one** of the priority items and select 1-2 strategies identified in the rollout meetings to make improvement. Helpful approaches to short-cycle action planning and adjustment are included in our [Return to Learn: Organizational Excellence Execution and Improvement](#) toolkit, and **Tool C** (see [appendix](#)) provides a simple template for the action plan. Like in the example below, a sample action plan in response to a student engagement survey could be:

Post and share your action plan with stakeholders to document the value of their input and your commitment to improve. This can be accomplished by using a variety of strategies, like:

- Record a video message
- Write a newsletter article
- Report to the board
- Report on an organizational website
- Post paper copies in schools/ departments
- Communicate in existing meetings— an agenda item to explain rollout process and wins with the action plan

### STEP 6: LEADERS CELEBRATE WINS AND COMMUNICATE PROGRESS

Check in weekly or monthly on the progress of the action plan and make adjustments to the actions as necessary. At each of these inflection points, communicate about your progress and what next steps you will take. For

example, an executive leader might share the following about a support services survey action plan:

*Since May, we have been working to improve the accuracy of our service to you. You told us that errors in our guidance and different messages from different staff members were making it hard for you to be successful. We've developed three checklists for standard processes and 2 "key words at key times" documents for unusual events that occur in order to make our service more consistently accurate. Mariel and Arthur have been particularly helpful in these efforts, which we celebrate and recognize. We are looking forward to further feedback about our progress on the next survey, and I hope you'll be in touch with additional feedback in advance.*

In the survey results and the rollout conversation there will be information to celebrate. As you take action for improvement you will also have wins to recognize. Report out at regular intervals on the success or the revision of the plan. Celebrate these successes as an organization and as individual schools/departments to sustain the team making new efforts and to remind stakeholders of your strong commitment to their satisfaction.



### SAMPLE EMPLOYEE ENGAGEMENT ACTION PLAN

Priority	Goal	Action Steps	People Responsible
Employee Engagement	Increase employee perception that "I am consulted on decisions that affect my job."	• Schedule department meetings to ensure high participation	Deans
		• Round with staff including question, "Which decisions have you discussed lately as a team?"	Vice President

## Summary and Final Tips

Again, the key to a survey is not the data itself. The key is **how well you share the data with the stakeholders, how you communicate the action based on their feedback, and how you follow through with an action plan for continuous improvement.** This process can be customized, but these actions create a systematic approach to drive results across your organization.

The following are some additional tips gathered from implementation of the rollout process in different organizations that you may find helpful.

- Seize the opportunity to report all future positive change as a result of the survey.
- Share survey success stories at employee forums/board meetings/committee meetings.
- Provide a survey update in the newsletter—"You Asked For It, We Listened". Connect the dots as often as possible to show actions that are a direct result of input.
- Keep survey return results high to sustain. Post return rate and thank stakeholders who participated.
- Require action plans from all principals, managers and directors. Without accountability there will be no change.

## Additional Information and Resources

Axtell, P. (2019). **Make Your Meetings a Safe Space for Honest Conversation.** *Harvard Business Review.* <https://hbr.org/2019/04/make-your-meetings-a-safe-space-for-honest-conversation>.

Callaway Karr, E. (2020). **Roll Out Survey Results With Employees.** *9P by Studer Education.* <https://9principles.com/learning/results-rollout-employee-meeting/>

Studer Education (2020). **Results Rollout: Why Every Organization Should Implement This Process.** *9P by Studer Education.* <https://9principles.com/learning/implement-results-rollout/>

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## TOOL APPENDIX

# RESOURCES TO PUT RESULTS ROLLOUT INTO PRACTICE

## TOOL A

## Sample Department Manager Letter—Employee Engagement Rollout Meeting

Dear staff,

Here at **[organization name]** we are focusing on four major goals to improve impact on the community. One primary goal is improved relations among employees and with the stakeholders we serve. To help improve these relationships we believe that everyone must feel they have a good and productive place to work.

Together, we believe we can create a great place for people to work. To get a sense of where we are with the staff engagement goal, we hired an outside group to administer and analyze a staff engagement survey. The initial results provide baseline data that we will use to judge our improvement during the year and at the end of each year. Once we get this baseline measure we will have a way to compare how well we are improving our work environment.

Our goal is to use these results to talk about our strengths and areas that need improvement. Unfortunately, we do not have a block of uninterrupted time when all staff can meet collectively. Therefore, we have scheduled three opportunities for you to participate in one 45-minute session. Please select from one of the following three options: **[List three options that provide a variety of times for meetings and include an explanation of how staff is to sign up for particular meetings.]**

I consider this survey to be our department's report card on staff engagement. I look forward to celebrating our identified strengths and developing a plan to address our developmental needs.

Thank you for helping us continue our journey of excellence.

Sincerely,

Department Head

cc: Executive Leader

Director

# Evaluation Form Template

## SURVEY DISCUSSION EVALUATION FORM

Please complete the following survey/evaluation at the end of the meeting. All information will be anonymous and confidential. We are sincerely interested in your opinion. There will be no retribution for candid remarks.

ORGANIZATION NAME: \_\_\_\_\_

**Directions:** Please answer the following questions by circling the number that best represents your opinion.

	<b>Strongly Agree</b>	<b>Agree</b>	<b>Somewhat Agree</b>	<b>Disagree</b>	<b>Strongly Disagree</b>
I received the data from the survey in an open manner.	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>
I was given an opportunity to provide input and feedback during the meeting.	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>
We discussed and prioritized the next steps to be taken based on the survey results and our meeting.	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>
I feel action will be taken by my leader.	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>
I feel action will be taken by executive leaders in my organization.	<b>5</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>

Comments:



# Short Cycle Action Plan Template

Priority	Goal	Action Steps	People Responsible





## CONNECT WITH AN EXPERT

Connect with us to explore how we can partner together to build a culture of excellence:

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