

How to Improve Employee Happiness and Retention

Applying the
Happy Meter

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Preface

Why should you read this article?

Here is a situation that happens to most managers at some point in their career:

As a caring manager, you hold frequent 'one-on-one' meetings with each of your team members. In each meeting, you make a point of asking, "How are you doing?" Team member says "Great!" This happens week after week, month after month. Then one day, the same team member is in your office telling you that (s)he has decided to leave.

When do you start hearing what the real issues are? My experience is that more often or not, it is when the team member is explaining why they have decided to leave. They are unhappy about something: bored, no challenge, want a career change, etc. If you are lucky, you might do a diving save and turn the team member around. However, in most cases, you have lost your opportunity to solve the issues that caused the team member to look elsewhere in the first place.

I struggled with this for quite some time, and came up with a novel solution. Why don't I routinely **ask** the team members what working well and what's not? Also why not **ask** the team members where they want their career to go in two years?

If you don't ask, then you are only guessing

This article takes this basic premise and creates a "Happy Meter" worksheet and tried-and-tested methodology that you can use at any level within your organization to improve retention while simultaneously improving team morale and happiness.

I have used the "Happy Meter" successfully for many years. It's a great technique for:

- Finding out what motivates and frustrates your team members. The solutions for increasing motivation and reducing frustrations are often surprisingly easy to implement
- Structuring a growth plan for each team member that can be integrated into performance reviews and bonus goal setting
- Structuring an action plan for improving overall team retention, happiness, and productivity

However, it only works if you, as the team's manager, are committed to making things better and are willing to be measured against this commitment:

- In many ways, the "Happy Meter" is a contract between you and the team member. You are saying "If you give me the feedback asked for in the Happy Meter, then I, as your manager, will agree to do all that I can to make the highlights better, and remove the challenges. It is one way for you to measure my performance as your manager"
- You need to take action on the feedback gathered, and invest sufficient time to follow through on the action plan. Otherwise, the team will realize this is just another toothless exercise management is putting them through
- Be ready for some tough criticism. Much of the feedback may be directed at you and the way you run your team. That can be hard to accept.

The rest of this article describes the content of the "Happy Meter" worksheet, suggested steps in how best to deploy the "Happy Meter" methodology, and finally some real examples of the feedback you can expect to gather.

George Swan

Part I

The 'Happy Meter' worksheet

The main goal of the 'Happy Meter' is to focus the questions on key areas of interest, yet leave the potential scope of the answers to be as open and as broad as possible. The end result should be a highly relevant series of responses that are truly important to the team member. Equally importantly, the responses are articulated in their words, and not compromised to fit into yours.

The second goal of the worksheet is to leverage the team member's ideas on how best to resolve their frustrations and career goals. They have probably thought way more about these issues than you, therefore why not capitalize on this?

The following questions are most pertinent:

1. How happy are you in your current job?

Its good to get a high-level sense of happiness. Look for some rating, say 1 (very unhappy) through 5 (very happy) I like to call this the "Happy Meter" rating

2. Top three highlights that make your job satisfying?

It is important to initially focus on what is working well, and not just the issues. It sets up a positive tone for the rest of the worksheet. In addition, as part of improving the "Happy Meter", you can maximize those things that are working well, and minimize those that are not.

3. Top three frustrations or issues that reduce your job satisfaction?

Out of the set of all conceivable answers to this question, there has to be a good reason why the team-members choose their specific three items. Maybe because they are the ones most important to them?

4. What actions can your manager take to remove these frustrations?

Take the guesswork out of management. Usually the team members have great insights into how to fix the problems they bring up. Why not ask them?

5. Describe your career goals and personal goals two years from now

A big part of a team member's happiness may be tied to how quickly they are reaching the professional and personal goals that they have set for themselves. If they haven't set any, then this is a great time to start. Have them describe what their world looks like in two years

6. Growth objectives you would want to achieve in the next twelve months that would move you towards your career and interest goals

Again, usually the team members have a good sense of the challenges they are interested in taking on. Ask for their input.

Typical responses

I have always been surprised and impressed with what I find out when people answer the six 'Happy Meter' questions. Here is a typical sample:

- This shouldn't bother me, but it really does. Why does Joe get a window cube and I don't?"
- "I really would like to project lead. Maybe I could manage a summer intern to show you that I'm capable"
- "I want to go part time so that I can spend more time with my kids"
- "I feel that I've been instrumental in making some key initiatives successful, but my role continues to be limited to just xyz"
- "Our group is not a team, we don't respect each other, we don't have a common vision, etc."
- "All this overhead is frustrating.
- "I want to move back to Europe in 2 years"

Summary

- The 'Happy Meter' Worksheet is an easy way to find out what your team members':
 - Like and dislike about their job
 - Want to do or be in 2 years
- It's a great tool for:
 - Getting people to tell you their likes/dislikes/plans
 - Generating behavioral objectives that can be used in the next performance review
 - Making your team member happy and loyal employees
- However it only works if:
 - You are committed to addressing the feedback given
 - Team members see value in telling you their secrets
 - They will see value if they see change happen

Part 2

Deployment

Use the 'Happy Meter' in conjunction with the following steps:

Team Member	Team/Organization
1. Hand out the worksheet to the team member	
2. Have the team member fill it out, then present it back to you	
3. Create an action plan for maximizing the team member's highlights, minimizing the frustrations and issues, and expediting completion of his/her two year goal.	
	4. Gather the common themes expressed across your organization into a single report. Work with your staff members to set a target for yourselves – Which percentage of the frustration items can we reduce, by when? Create an action plan for achieving the target
	5. Present the organizational themes, goals, and action plan to your organization
6. After a reasonable period of time, sit with the team member and re-assess progress to date re: the individual's action plan	
	7. Update the team themes and summarize progress to-date on action plan and results
8. After a reasonable period of time, start at step 1 again!	

Each step will now be discussed in more detail:

Step 1 : Hand out the 'Happy Meter' Worksheet

- Hand out the Happy Meter during one of your 1-on-1 meetings with the team member
- Make 'pact' with team member
 - (S)he takes the time to thoughtfully fill out the worksheet
 - You sign up to having your value as a manager measured on your ability to address the issues where possible
- Articulate that all the feedback in the worksheet will be kept confidential between manager and team member
- Plan to meet and review the 'Happy Meter' soon (for example, in two weeks).

Step 2: Have the team member fill it out, and present it back to you

- Using whatever medium works best for the team member, have them take the time to thoughtfully fill out the 'Happy Meter' worksheet. Some will want to write down their feedback. Some will want to verbalize their feedback. Some may need help sharing and articulating their views before telling you. In any case, do what you can to capture the feedback into a written form without injecting your own viewpoint on the data received.
- Arrange a time where the team member and you can talk through their comments in the 'Happy Meter'
- You:
 - Listen
 - Clarify
 - Understand expectations
 - Obtain mutual understanding of resolution difficulty
 - Brainstorm with the team member on possible solutions
- File away the 'Happy Meter' worksheet where you can find it again
 - This feedback is golden information!

Step 3: Create a set of individual goals and action plan

- Create a personalized action plan that will:
 - Leverage what's working well
 - Remove or reduce the frustrations
 - Address the career and interest goals for the coming year

I found that it is a great idea to incorporate as much of this action plan into your team member's performance review. All too often, I see performance reviews be a summary of the tasks that a person did over the past year, and then a list of the tasks that they need to do over the coming year. This future list is more to do with the work that has to get done versus the strengths, challenges, and career goals for the team member.

A much better way to grow a team member is to focus on the developing skills and career goals, and build a series of tasks and assignments that certainly 'get the work done', but will help also move the individual quickly towards these goals. For example, if they are interested in a project leadership position, then over the year, you might task them to play more of a supervisory role over new hires. If teamwork is a quality needed to advance to the next level, then have the team member demonstrate better teamwork with colleagues etc.

Step 4: Gather common themes, then create organizational goals and action plans

- Summarize key themes into a report. You don't ever want to expose the data written in individual 'Happy Meter' worksheets, since it is based on a confidential conversation between you and your team member. However, you can extract common themes expressed by one or more team members.
- Work with your staff members to:
 - Validate the information in the report (i.e. are the highlights and frustrations correctly captured in the report?)
 - Create organizational goals to reduce top frustrations by x%
 - Lay out the team action plan to achieve goal.

Note that this summary of the 'Happy Meter' can happen at any level in the organization. A first-level manager would collect together all the themes for his/her group. A second-level manager would have the managers do their summary first, then he/she would collect together all the 'themes of themes', and so on. The goal here is to eventually be able to present the themes back to your entire group, therefore by collecting the information in this way, the final report should be correctly positioned based on the level and size of the organization. For example, a first level manager's summary will likely contain more specifics. The third-level manager will likely be just as valid, but contain more broad-brush summaries.

Step 5: Present the organizational themes, goals, and action plan to your organization

As a manager, this is a great opportunity to communicate with your organization on something they are guaranteed to care about – themselves. Use the meeting as a chance to articulate what you believe the highlights and frustrations are in the team. Be seen to understand these points, as well as show that you have a plan in place to address the frustrations. Seek feedback on how well you understand the issues. Seek feedback on the action plan. Adjust both accordingly.

Step 6: Review individual goals and action plan

As a manager, you should continually review the individual 'Happy Meter' worksheets to make sure you are on track with making the changes you agreed to. After a reasonable period of time (for example, six months). Review the 'Happy Meter' worksheet with the team member to get a status. Hopefully some of the frustrations have been removed. Maybe some new ones have popped up. Refine the 'Happy Meter' action plan as needed.

Step 7: Review organization goals and action plan

After a reasonable period of time (for example, six months), review the organizational goals, and action plan status with your organization. **As a manager, it is very hard to stand up in front of your organization when no progress has been made!** Hopefully however, you and your team have been able to make progress. Sharing that progress with the organization to 1) get validation that the progress was observed by them and 2) show that you are being responsive to their needs, is a huge morale booster for the team. Based on feedback from the presentation, refine the group goals and action plan as needed.

Step 8: Start at step 1 again!

This is a continual process of improvement. My experience is that team members get frustrated by continually having to fill out the 'Happy Meter'. I used to cycle through steps one through eight once every 12 months. It was enough time to deal with some of the tougher issues in the group, yet it wasn't so long that people forgot what the original goals and actions were in the first place. It will be important for you to judge what frequency rate is best for your team and workplace dynamics.

Part 3

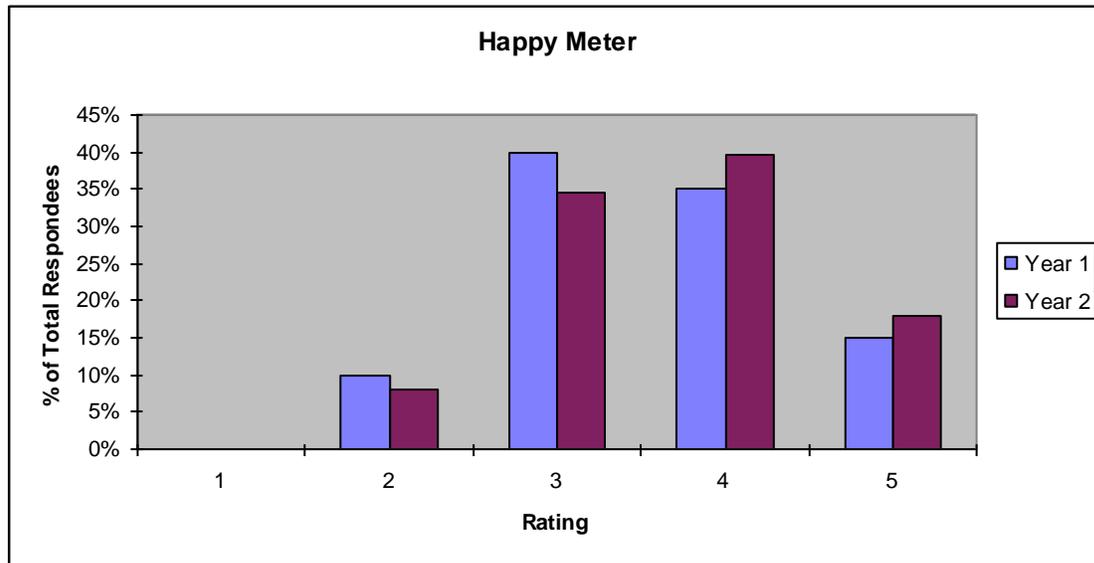
Detailed Examples of Information gathered

Individual 'Happy Meter' worksheets

Here are some generic examples of what you can expect from a filled out worksheet:

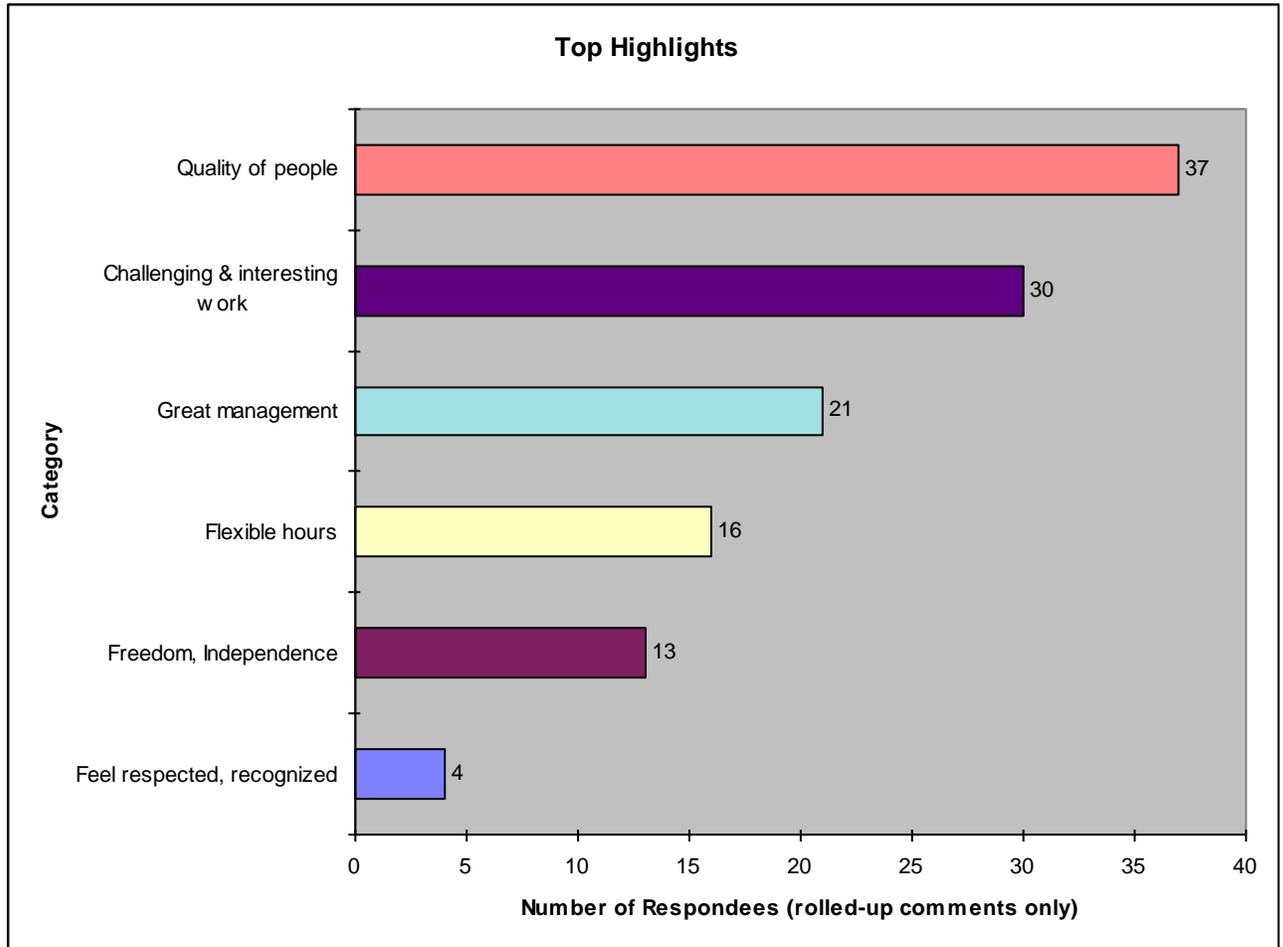
(to be added – show range of worksheets with only a few words, to one in which worksheet is crammed with info)

Happy Meter summary



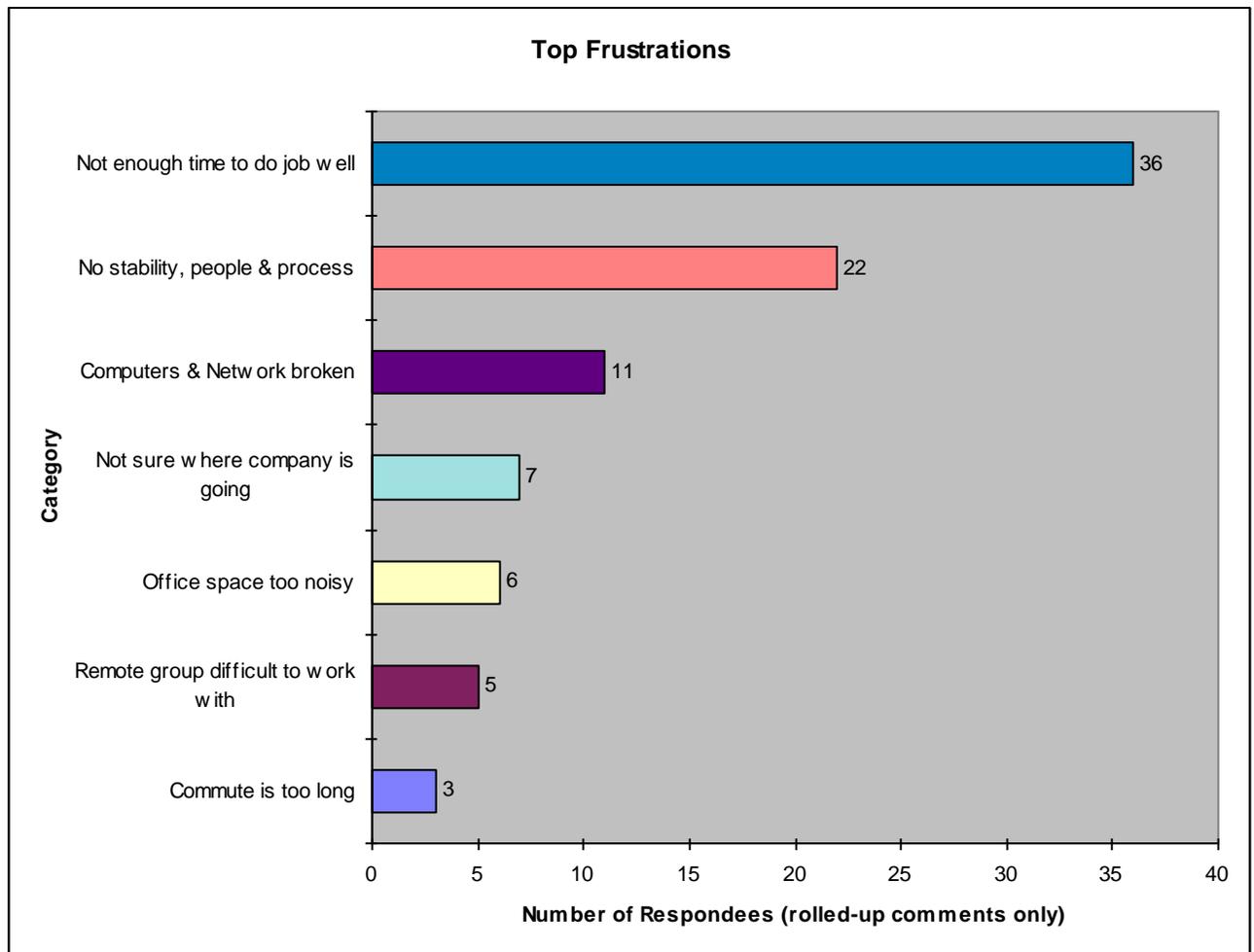
In this example, you can see that overall, happiness in the group has improved over the 12 month period measured. In terms of averages, the 'Happy Meter' moved from 3.6 to 3.7.

Highlight summary



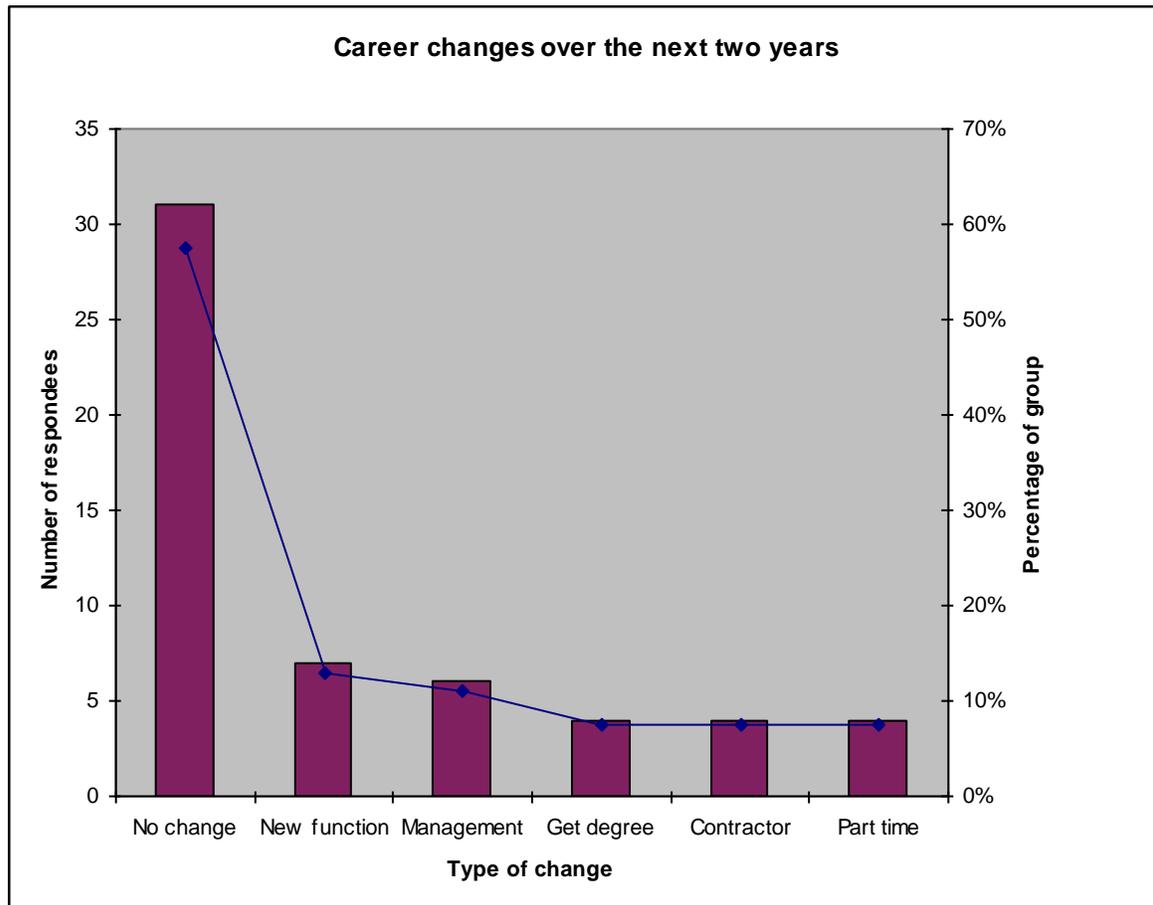
What great information to get on your team – they are loving the people they are working with, they feel challenged. Look at the pat on the back for management! Great job!

Frustrations summary



Again, great information on the team. Frustrations tend to be more scattered in the range of topics, but as there will almost always be a couple of items that are common to the team.

Career goals summary



This is not information that I suggest you share with the organization, since it has less to do with the team as a whole. Instead I would use this data within your staff to deal with impending change. I had one experience in which, after doing the 'Happy Meter' process, a manager came into my office and slumped into the chair. "My entire team are planning on leaving within one year!" Now she was a great manager. It was just that her team consisted of high-growth individuals, who were aggressive about moving their careers forward. After the initial shock, it was great to have the information. Now she can plan on how to rebuild the group knowing. Much better to have 12 months advance warning on this versus having to deal with it reactively. In the end, the people did leave, but the group continued to move along without missing a heartbeat.

Appendix A

'Happy Meter' Worksheet

Happy Meter - How happy are you in your current job?

- 1 - Very Unhappy. Only doing it until I find something better
- 2 - Unhappy. Number of frustrations etc. that reduce enjoyment
- 3 - Quite happy. Would be better if some frustrations removed
- 4 - Very happy. Enjoying the job a lot
- 5 - Extremely happy. Can't imagine a better one

Top three highlights that make your job satisfying?

1.

2.

3.

Top three frustrations or issues that reduce your job satisfaction?

1.

2.

3.

What actions can your manager take on to remove or reduce these frustrations?

1.

2.

Describe your career, personal, and interest goals 2 years from now

Please be as specific as you can: job role, responsibilities, manage a team, technical leader, relocate, balance work and personal time, work part-time or as a consultant, product or technical areas that you would be interested in learning and being part of, etc.

1.

2.

3.

Growth objectives you would want to achieve in the next 12 months to get you to your career and interest goals..

1.

2.

3.