**The collaborative workplace:**

# Improving employee engagement

**Poll Everywhere**

# Introduction

Today's teams work from cities all over the world, and technology now enables them to communicate and collaborate instantly. 2018 reports are showing record numbers for remote workers, with as many as [52% of global employees working remote](#) at least once per week. As we enter 2020 and beyond, this number is only expected to grow. [HubSpot's 2019 remote work report states](#) "remote work is a key ingredient to building a high performing and diverse company". Remote work is no longer the future, it is the present, and employees and managers alike must adapt - fast.

As [Michael Dell said](#), "Technology now allows people to connect anytime, anywhere, to anyone in the world, from almost any device. This is dramatically changing the way people work, facilitating 24/7 collaboration with colleagues who are dispersed across time zones, countries, and continents." This explosion of endpoints and widespread, immediate collaboration spurs the need for centralized management and a solution that helps you capture data and feedback instantly and inclusively. As excited as workers might be for the transition to a primarily remote workforce, studies show that we may be ill-equipped.

In an effort to fill this gap, we crafted this in-depth guide on how to build and manage an effective and collaborative remote team, hold more efficient meetings, scale your company culture across the globe, and capitalize on upcoming 2020 tech trends with clarity and consistency.

> **"38% of remote workers and 15% of remote managers received no training on how to work remotely"**
>
> *OwlLabs, 2019 study*

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# Remote management

We live in the information economy where today's top businesses increasingly rely on sophisticated teams of employees rather than the output of sequestered individuals. Today's complex work environments require the multi-layered perspectives, experience, creativity, and talent of a team. Businesses need to build better, stronger, and more cohesive teams, but that isn't easy! The foundation of a great team is a strong sense of comradery and collaboration. Effective team management focuses on building a collaborative spirit within both the virtual or office workplace. How can today's managers improve collaboration, and, ultimately, their company's bottom line?

Managing a remote team comes with its own unique strategies and considerations. Virtual team members often have different schedules, roles, and communication styles, making team management a bit more challenging. It's important to know that team members are available, completing tasks, and producing quality work. Because you're not in the office with them all the time, this can be more complex than in-person team management.

How can a manager improve virtual team collaboration? It can be as simple and as seamless as integrating key software into your daily management routine.

## Implement a task management software

Task management may be without the confetti and fanfare of other software, but it is possibly the most crucial software for your team's success. Tools like [Asana](#), [Flow](#), [Workfront](#), or other collaborative task management software ensures visibility into project statuses and timely completion. Most task management software has the ability to store documents for easy access from any device, anywhere.

**Try this:** Using Poll Everywhere, survey your team to find out which software they would like best. Then, take the top-voted options and set-up trial periods with them (most task management software has at least a 7-day trial period) so you and your team can gain hands-on experience and make an informed decision.

**Pro tip:** Lengthy decision-making processes can lead to the dreaded decision fatigue, reducing your ability to make good choices and potentially leading to irrational trade-offs. Luckily, there are a few ways you can avoid this: limit your team's choices to no more than 3 options, set a decision deadline, and decide early. [Studies have shown](#) that people make better decisions earlier in the day when their mental acuity is sharp. Your team and your to-do list will thank you.
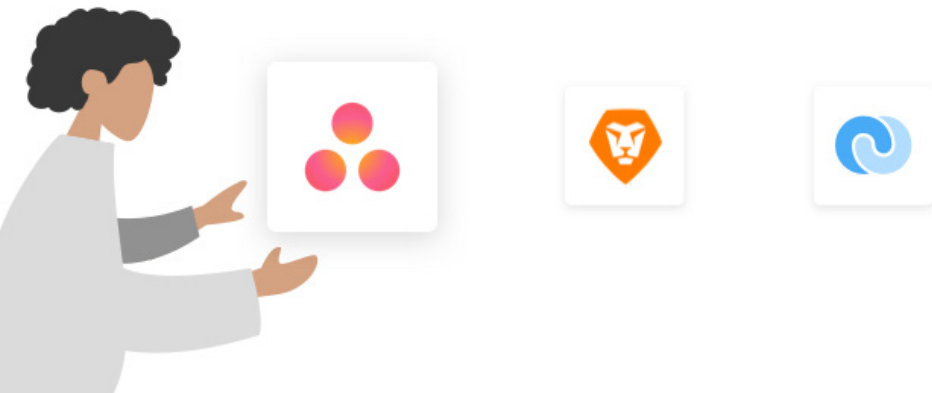
## Offer multiple forms of communication

Communication is the cornerstone of a collaborative and efficient team. But, everyone's styles of communicating may vary greatly. Offering various channels of communication allows people to choose what's right for them and the situation. While a more formal request might go through email, short messages might be better suited for organizational chat platforms like Slack, and last-minute emergencies might require a call or text. You can also set guidelines about how to use each communication method.

**Try this:** Foster both formal and informal collaboration by setting up Slack for your team. If you're managing a larger team, you could even create channels for subdivisions of your team to ensure team members are only receiving notifications most relevant to them. Poll Everywhere for Slack can be a great way to quickly take a vote or gather feedback from your team.

## Schedule designated work hours

Virtual team management usually comes with employees in various time zones and countries. To streamline communication and nurture collaboration, establish designated work hours that keep everyone in the loop as to when their team is available. Remote workers often set their own schedules, but having dedicated work hours throughout the day is great for virtual collaboration, meetings, and productivity.

**Try this:** Slack statuses can be a great way to provide both in-office and virtual team members visibility into their coworkers' availability. Encourage your team to update their status to reflect when they're on PTO, taking a coffee break, grabbing lunch, working heads down on a tough project, or in a meeting.

**Pro tip:** Syncing Slack with Google Calendar will auto-update your Slack status to reflect when you're in a meeting. As a bonus, it will even send you meeting notifications and reminders via Slack. Cheers to automation!

## Meet virtually as often as you would in-office

Working from different offices around the country, or maybe even the globe, can require some creative thinking when it comes to hosting team meetings. All-hands meetings, fireside chats, and virtual employee trainings are great ways to keep your team in the loop, celebrate wins, and set goals. Today's technology makes it easy to video call, collaborate virtually, and engage your team in real-time.

**Try this:** Bring life to your meetings by actively engaging employees. Hosting a retrospective on big projects and releases can be a valuable way to gather feedback and find areas for improvement. Creating a competition to end your meeting offers the benefits of testing team knowledge and gamifying the workplace.

> **"Trust and rapport are even harder to build when you are remote. Take every opportunity to meet face-to-face, even when you wouldn't have in the office."**
>
> *Cory Buecker, Business Engineer & Analytics Manager*

## Give your employees autonomy

No one loves a micromanager, but even companies that give their employees some autonomy may not be going far enough. Employees want to feel like they have control over how they perform their jobs. Offering your team more autonomy shows trust & respect and gives employees a feeling of ownership over their work. A study performed at the University of Birmingham surveyed 20,000 employees and found that workplace autonomy has positive effects on job satisfaction and employee wellbeing. Research conducted by the Department for Business Innovation and Skills indicates an increase in wellbeing is associated with improvements in work performance.

**Try this:** Challenge employees to take more ownership of their jobs. Encourage them to pitch their own projects or brainstorm ways they can do more with less oversight. Also, you can give the opportunity for them to manage a project you would have managed as an way to encourage growth and ownership in their role.

# Set clear expectations

It may sound obvious, but employees need to know what leadership expects from them in order to feel like they can succeed in their careers. This requires managers to set clear goals and to provide consistent feedback to employees.

Millennial workers, in particular, value feedback. As an article for Gallup Workplace explains, "Millennials have grown up in an era of remarkable connectedness. They're used to receiving instantaneous feedback from parents, teachers and coaches." A Gallup Workplace poll found that only 19% of millennials say they receive routine feedback at work.

**Try this:** Consider reworking your employee evaluation process. Instead of conducting a single, nail-biting evaluation each year, try creating a system of more regular and casual "feedback meetings" where you can provide clear, actionable feedback to employees. Biweekly or monthly one-on-one's can be a great way to encourage your team to discuss goals, challenges, or questions they have. Regular one-on-one's have the added benefit of giving the manager a chance to offer support, realign objectives, and establish a strong relationship with their team. With busy work schedules and upcoming deadlines, it might be tempting to cancel these meetings. We encourage you not to do so. Frequent opportunities to give and receive feedback is a critical component of any performance management strategy.

## Offer opportunities for growth

We are long past the days when most workers viewed their careers as simply a means of earning a living. These days, employees view their careers as a holistic part of their lives and expect continued growth and development opportunities.

According to the [American Psychological Association](#), "Opportunities for growth and development help employees expand their knowledge, skills and abilities, and apply the competencies they have gained to new situations." [Business Insider](#) outlines a few alarming workplace stats, stating that a lack of career growth is a key reason employees resign, and that "77% of employees feel they're 'on their own' to develop their careers."

With workplace engagement and career development top of mind for employees, it's more important than ever to focus your attention on how to nurture employee learning, skill expansion, and career growth.

**Try this:** Review career growth opportunities within your company. Do you have a robust mentorship program? Do you offer tuition reimbursement to employees? Look at ways to create development programs within your organization so you can effectively turn today's best young employees into tomorrow's powerhouse managers.

## Clarify the roles of each team member

Collaboration is often an organic process that blossoms when team members begin to trust each other and feel secure about their place in the group. That starts by clearly defining the role of each team member. Ensure that responsibilities are clear, so team members aren't trying to perform the same task or aren't butting heads about who is responsible for what. Let team members know who reviews, who approves, who can answer questions, et cetera.

**Try this:** When forming your team, create a simple-to-understand organizational chart or process chart that team members can reference if they have questions about their roles and the roles of others. Share this with other departments you work regularly with so they know who they can go to with questions.

## Show employees you care

Employees want to feel respected and supported in their careers. Sometimes, a "thank you for your work" goes a long way towards helping employees feel appreciated. Another way companies can demonstrate how much they value their workforce is to offer highly prized benefits, like health insurance, paid family leave, or even a gym membership.

Not every company has the funds to be able to offer each employee a $2,000 annual vacation stipend like Airbnb or unlimited parental leave like Netflix, but that doesn't mean you can't find a fun way to show you care. How about bringing in lunch after the end of a big project or using Poll Everywhere to host trivia contests every Friday with fun prizes for the winners?

**Try this:**  Survey your employees and ask them what workplace benefit they most want. Sit down with your management team and determine how you can create fun, authentic employee appreciation experiences for your team.

## Increase work flexibility

Today's workers care more about achieving a good work-life balance than ever before. Parents want to spend more time with their kids, younger workers want to leave early on Friday for a weekend getaway, and older workers want to spend more time with friends or on their personal hobbies.

According to the 2018 Retention Report, roughly 13% of respondents switched jobs to achieve a better work-life balance, and the 2018 Global Talent Trends study reported that 51% of employees wanted more flexible work options.

**Try this:** Consider offering flexible start and end times at the office, or letting in-office employees work remotely periodically. When designing vacation benefits, take the benefits and drawbacks of PTO and unlimited vacation policies into account. Both vacation plans can have varying effects on your employees, and the best fit for your team will be based on your current company culture and the one you are trying to cultivate.

## Help team members get to know each other

Collaboration is a lot smoother when team members know and trust each other. That doesn't happen overnight, but you can certainly help speed up that process by creating opportunities for coworkers to spend time together during office hours, outside the office, or through a 'remote hangout' (a watercooler type chat via Google Hangouts or other video meeting platforms). New hire welcome emails and casual Slack channels are also great ways to foster deeper connections. It could also be as simple as holding weekly trivia games on Friday using Poll Everywhere Competitions or hosting a quarterly barbeque.

**Try this:** Brainstorm some fun, stress-free activities that encourage team building and collaboration (an interactive game of People Bingo works great, but more on that later). Set up topical Slack channels to chat about shared interests like pets, movies, music, home decor, cooking, or traveling. You might be surprised at how quickly you can get to know remote coworkers whom you may have never met in person!

## Meet in person when possible

Although remote work is growing in popularity (more than 3.9 million Americans reported working from home sometimes or working remotely full-time), there's something special about in-person meetings. At Poll Everywhere, we reap the benefits of both worlds by hosting team and company-wide meetups twice a year. Team members can put a face to a name, collaborate in-person, get to know each other, and experience the benefits of osmotic communication.

**Try this:** In addition to annual company-wide meetups, try fostering in-person gatherings throughout the year. Your virtual team may live thousands of miles apart, and in that case, consider trying out smaller team meetings that include employees who live close to each other.
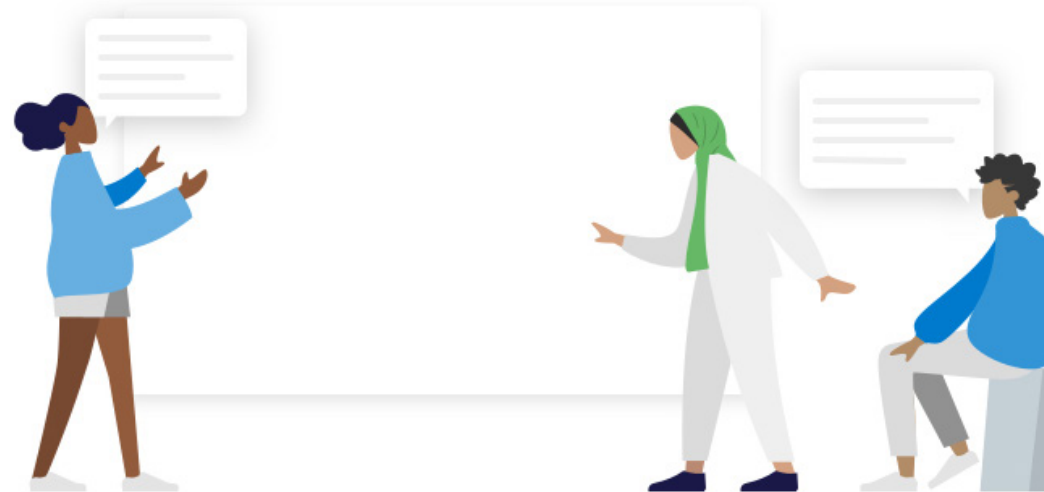
## Gather feedback

Productivity and profitability thrive when employees are engaged and when collaboration and feedback are the standard. Research from Gallup and McKinsey highlights the competitive advantage of a highly engaged workforce (hint: these companies outperform those without by 147%).

We have a unique way of anonymously gathering employee feedback and turning it into a two-way conversation that identifies problems and ultimately, their solutions. Our Chief Operating Officer, Sam Cauthen, addresses each question or concern from the survey.

**Try this:** Gather your team and present the challenge or goal. Instead of telling them your solution, solicit ideas and feedback. Ask the opinion of everyone in the room, including your more introverted or newest employees. If you're worried about putting anyone on the spot, consider using an anonymous poll to gather feedback.

> **"The live Q&A is a special experience. It's authentic, it's unfiltered, and it's truly impactful."**
>
> *Thoey Bou, Director of People Ops at Poll Everywhere*

## Reward amazing teamwork

Your employees value feedback. One of the best ways to support collaboration is to reward it when you see it. Publicly acknowledge teams that are doing great work.

**Try this:** Make it a monthly or weekly tradition to highlight an individual or team that is doing an excellent job at your company. Start your regular team meetings with the space to celebrate accomplishments across the team. Be authentic! If your praise feels forced or hokey, it won't mean much to your team.

# Set, share, and track goals

Goals have the unique power to align, motivate, and inspire a team. When colleagues collaborate to set goals, they create an environment where everyone strives to perform their best. Every team needs a goal, or goals, to accomplish. Maybe your team is working on a marketing campaign, creating a new project, or simply providing excellent customer service every day. Try the SMART (specific, measurable, achievable, realistic, timely) method and set up regular meetings to provide status updates and track progress.

As organizations grow, it may be that a team's goals involve more than one team member. Ensure your team has visibility into both the company's and coworkers' goals so they can better understand how each person plays a role. Goal transparency is crucial for accountability and ultimately, success.

**Try this:** Collaborate with your team to set a clear and simple goal vision. Include both personal and team milestones that help everyone stay on track and facilitate coworking as often as needed. As teams work hard to complete goals, many lessons are learned and insights are gained. Schedule a retrospective meeting to document what went well, what didn't, and what steps can be taken to improve future processes

**Pro tip:** When your team completes their goal, make sure there's a celebration planned to reward their hard work. This could include a lunch outing, company-wide recognition, a half-day off, or even cake delivered to the homes of your virtual team members (we like to do that here at Poll Everywhere).

# In-office vs. virtual teams: key management differences

Management isn't easy, but it can be the most rewarding part of any career. There's added skills when you're working remote – and managing, too. Recently, Poll Everywhere Marketing Manager, Courtney Rogin, made the remote plunge and learned the challenges and benefits of working fully remote. She wanted to learn from the best, so she reached out to Poll Everywhere co-workers to see what advice they had for working and managing remote.
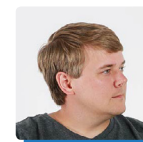
**Andrew Hampton**

Full Stack Software Engineer

Andrew has been full-time remote at Poll Everywhere for almost four years, and working remotely for over a decade. Here's his tips on sustaining remote work for several years at the same company:

- Avoid distractions by keeping your office or workspace separate. This also makes it easier to walk away from work at the end of the day.

- Keep your morning routine. I still get up at the same time as when I went into an office. I still get ready as if I were leaving the house.

**Aimee Escobar**

Director of Customer
Success & Support

Aimee manages a large hybrid team (both in-office and remote employees) while working full-time from our San Francisco HQ. She shared her best tips on managing remote employees while being in-office:

• Check-in just as you would with in-office employees. Ask about their weekend, day or any personal matters.

• Make their one-on-ones count. Plan an agenda accordingly and follow through on any action items.

• Take advantage of remote visits by extending one-on-ones and creating moments to bond such as team outings, activities.

**Robert Graham**

Director of Marketing

Robert is our fearless marketing leader and has been with Poll Everywhere for over five years and is the only director that works fully remote. Here's how he manages a team of remotes while being remote.

• Be extremely consistent about visibility of presence, punctuality, understanding expectations, and reporting on progress.

• You will learn of many things later than others. If you learn of things late, then you can be late or last to weigh in. You can be calm and considered where others might be more reactive.

• You may (especially if remote with coworkers in an office or closer in proximity) be at a disadvantage to speak up in a timely way at meetings. If you must miss out on serendipitous moments, then you are afforded the opportunity for greater focus. Embrace it.

**Kyle McFarland**

Apps Team Lead

Kyle McFarland has previously managed the fully remote Apps team at Poll Everywhere. When asked about his insight into effective remote work and management, he cited trust and communication as some of the hardest things to get right.

> **"I'm fascinated with how proximity or being a remote worker impacts trust with non-remote team members, other remote workers, or the business. I've seen a lot written about this topic, but what is most salient to me are the three elements of trust; You believe I have your best interests at heart, I do what I say I am going to do consistently, and you see me perform these actions. I view these as core dials for team success and even MORE important for remote team success."**

Because virtual teams are potentially in different timezones, have widely different working styles, and are not physically co-located, building trust can be significantly harder. Humans are fundamentally social creatures and can easily turn on the innate "fight or flight" mode and quickly distrust remote team members if normal social queues are not present or misread in an interaction.

With remote work, a key element of trust is removed: I do what I say I'm going to do, you believe, and you don't see me do it. As a remote worker, it can be challenging to ensure others in the company see you do the things you say you are doing.

**Pro tip:** Impeccable agreements. Because trust is easy to erode, Kyle's team practiced a process called impeccable agreements, asking that everyone writes down *who will do what and by when*. This simple yet powerful agreement process helps prevent dysfunction from escalating and sloppy agreements from forming. Having it written down helps remote workers check in explicitly with others and acts as a forcing function for us to ask the question, "Did you *see* me do this and agree the agreement was accomplished?"
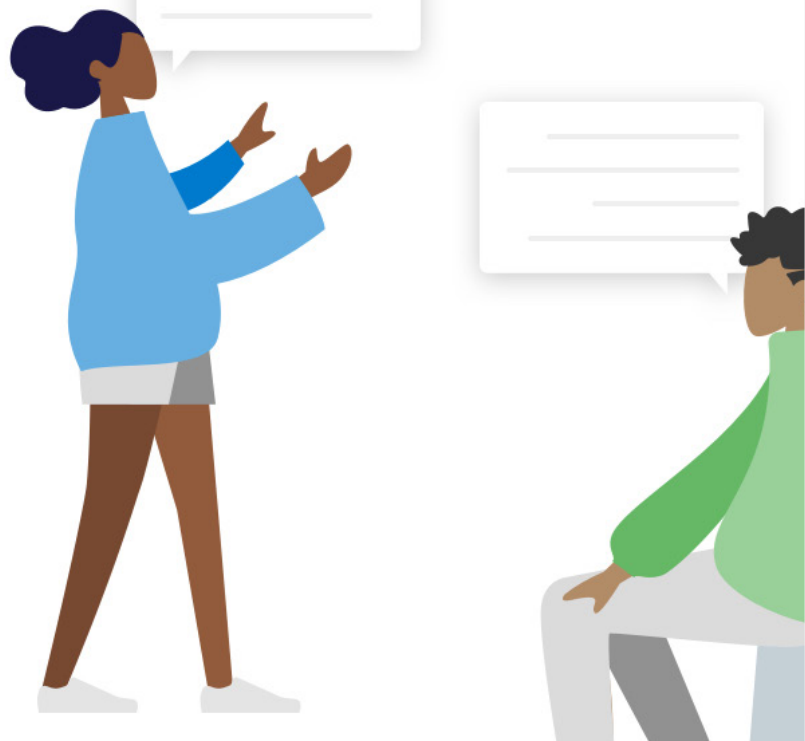
# Mic drop your meetings

Meetings, when done right, can provide incredible value to a business. They allow teams to brainstorm, share information, collaborate, and track progress on goals. Meetings form the cornerstone of any successful team and play a critical role in the efficient synthesis and distribution of information designed to keep members aligned. Why then, are workplace meetings dreaded by employees and managers alike? Research from David Grady and Jason Fried shows that 50% of people find meetings to be unproductive and 73% of employees do other work in meetings. The cost of these wasted meetings is estimated at a whopping $37 billion per year. Another shocking statistic from Grady and Fried's study points to what could be the root of the meeting problem:

> **"75% of people have received no formal training on how to conduct a successful meeting"**
>
> *David Grady and Jason Fried*

The solution to our collective meeting miasma isn't to eradicate meetings for all time and never speak their name again. Rather, it's to improve how meetings function so that they provide clear value to participants and help the company complete its goals. In other words, good meetings depend on good meeting facilitation.

## Determine the best communication method

With so many options to choose from, Google Hangouts, Zoom, to name only a couple, selecting a tool that best fits your meeting has never been easier. Slack, for example, is great for quickly communicating with remote employees, and can also help facilitate meetings. Slack offers video calling options, allowing you to call employees directly through the app or call everyone related to one channel, such as the team working on a certain client or project. For the most technical teams, Slack offers screen sharing and drawing on screen capabilities, making it easy to explain how to use software or a program or troubleshoot a computer issue that your coworker may be having.

## Check your tech

Having high-quality audio and video technology will make all the difference during your remote meetings. Make sure to test your equipment and to have everything set up before the meeting starts. Investing in a pair of good headphones with a built-in microphone can also help provide clear audio and minimize background noise for both you and your meeting participants.

## Ask key questions

*What are you working on today? What did you accomplish yesterday? What are your blockers?* Daily standup meetings are an effective way to identify blockers, track progress, and gain insight on project statuses. With Poll Everywhere, you can easily collect answers from your team and record the data for later reference.

## Keep it short

As we discussed before, meetings are costly to a business (calculate the cost of yours here). Your meeting should only take as long as absolutely necessary to achieve your goals. You'd be amazed at what you can get done in 15 or 30 minutes when everyone at the table is motivated and engaged. The job-hunting website, Monster, suggests that 45-minute meetings hit "the attention-span sweet spot." All the way back in 2009, Harvard Business Review wrote about the power of 50-minute meetings.

Google's Calendar app simplifies scheduling shorter meetings. Customize the default meeting duration within settings to the number of minutes that best fit you and your team. Additionally, enabling Google's "Speedy meetings" option automatically ends 30-minute meetings 5 minutes early and 60-minute meetings 10 minutes early, allowing for breathing room and much-needed bathroom breaks.

## Designate working hours on the calendar app

One of the benefits of having a remote workforce is that employees can work from anywhere, but this also means that you'll have to schedule meetings around varying time zones. Tools like Every Time Zone can help.

## Come prepared

While tools like Asana aren't exactly made for meeting facilitation, they are still great collaboration tools to organize your team's work and know what everyone is working on. Using all this information, you can easily come to your next meeting prepared to discuss the team's progress, goals, and action items. Visibility into your team's workflow and tasks is key to hosting a successful meeting.

## Make an agenda

Creating an agenda may seem like obvious advice, but not everyone takes it. Before you call a meeting, figure out exactly what topics you want to address and what you want to achieve. Provide everyone a copy of the agenda prior to the meeting in order to give your team a chance to review and think of any questions they may have.

## Only invite necessary members

Many workers get dragged into meetings because it "might" be useful for them to observe, but it's probably more useful for them to spend that time doing their jobs if they aren't really needed. When scheduling your meeting, consider who absolutely must attend and only invite those individuals.

## Start on time, end on time

Time is a finite resource, which makes it nearly invaluable. Every minute a worker sits in a meeting is a minute they can't be working on their own projects. Start your meetings on time and keep an eye on the clock. Sometimes long meetings are inevitable, but usually, a good facilitator can help the team wrap up on time or even a little early. Ensuring your team is adequately prepared prior to the meeting can help keep them brief and productive.

## Set up a "virtual watercooler"

Build in a few minutes at the beginning of the meeting to give remote employees the opportunity to chat casually. Scheduling time for casual conversations is great for team building and also prevents this type of chatter from cutting into your precious meeting time. Fun icebreakers or trivia questions are great activities for virtual watercoolers and can also help employees get to know each other.

## Focus your discussion

Discussion time during a meeting is crucial for strong collaboration, brainstorming, and team building, but it's often the most likely point where the meeting can fall off the rails. As a facilitator, it's your job to keep the discussion focused and relevant. If someone starts to deviate too far from the topic at hand, pull it back and remind everyone again about the meeting goal. Incorporating live polls into your meeting discussions helps keep your team's attention on the topic at hand and simultaneously keeps side conversations at bay.

## Provide everyone space to contribute

Extroverted employees, with their bold and confident personalities, can sometimes outshine introverted ones, especially in meetings. Make sure you ask for feedback from everyone so you can take the full temperature of the room. Your more introverted team members may have great contributions to make, especially when given the chance. Poll Everywhere provides the perfect setting to gather feedback from all your employees, no matter their personality type. You can even set up an anonymous poll to gather more authentic feedback, especially if the question is more sensitive in nature.

## Outline next steps

Congratulations, you've successfully completed your meeting! Ensure the progress made is not lost by sending a meeting recap email to attendees. Include what was discussed, and by the time the meeting is over, you should have accomplished your goal or at least made progress. Be sure to articulate that accomplishment so that your team feels good about the time they just spent. Close the meeting by ensuring team members are aware of pending action items, next steps, and deadlines, so they can properly execute and follow up where needed.
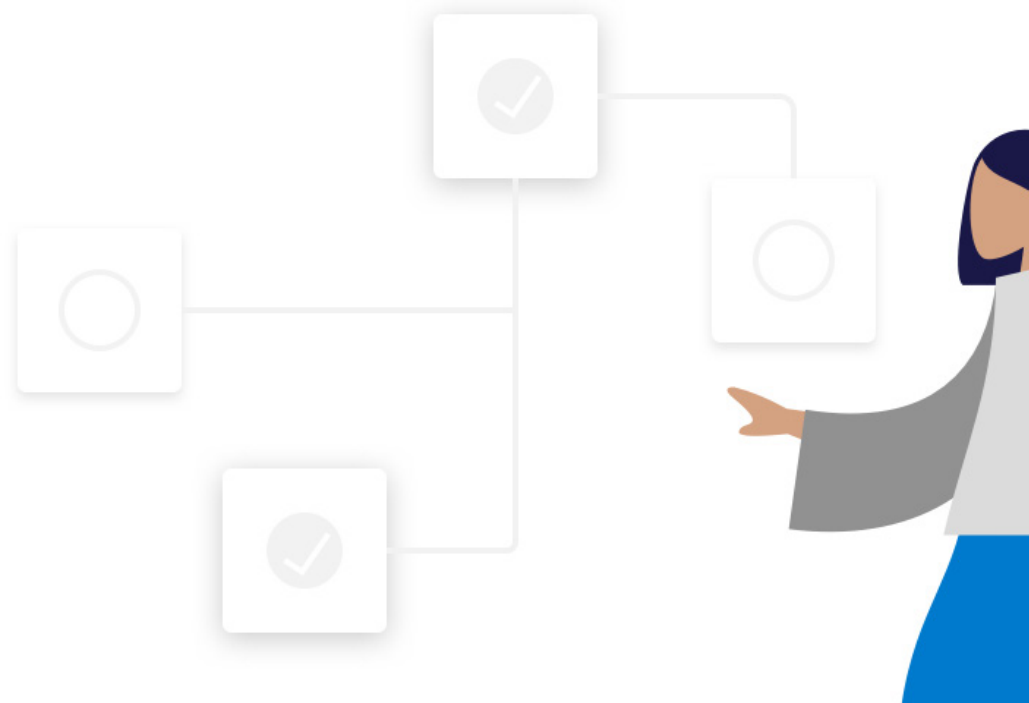
**Section 2:**

# Scale your company culture
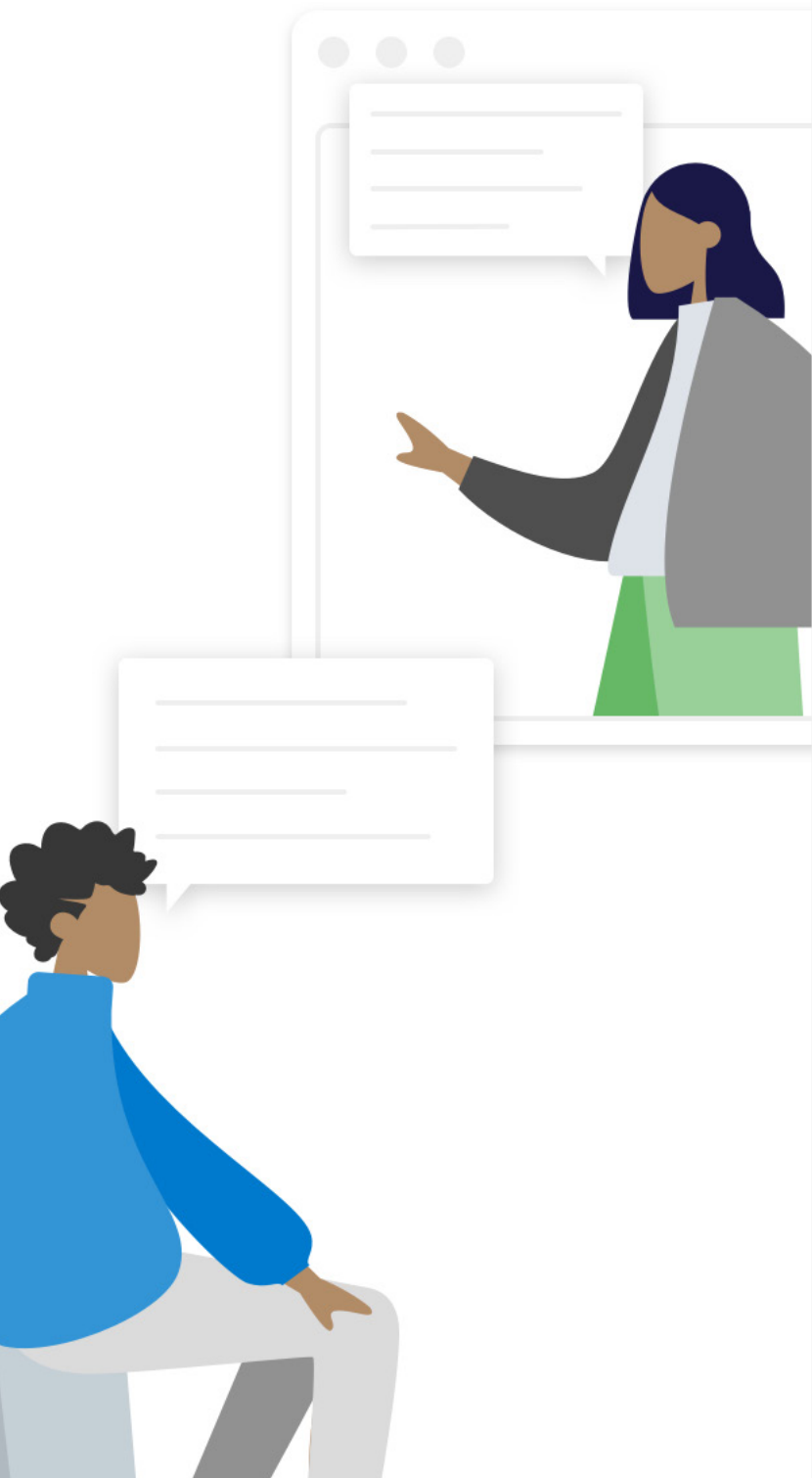
# Bridge the gap between remote and onsite teams

There's no quick and easy path to building company culture. And with a remote or hybrid team, it can be even more challenging. If there's one thing we're sure of, it's that company culture comes from the ground up. It's the result of the collective effort of your entire team, every day. Although it may not be easy, it's incredibly rewarding. Working remote benefits both the company and employee in countless ways, but remote work can pose some key challenges to workers including loneliness, boredom, and isolation. So, how do you build a culture of trust, productivity, collaboration, and autonomy when there are thousands of miles between your team?

> **"…company culture comes from the ground up. It's the result of the collective effort of your entire team, every day."**

Since more than 40% of the Poll Everywhere team works remote, our Director of People Ops, Thoey Bou, has come up with a few ideas:

## Welcome emails

Integrating newcomers into your culture is no easy task, especially with a remote team.  Welcome emails are a great opportunity to allow your new team member to introduce themselves and become familiar with the company's culture. Personalize this initial correspondence by asking questions like (What is your hidden talent?), (What is something few people know about you?), (Tell us a fun fact!) As cheesy as these questions may seem, they can really help make a new employee feel comfortable and encourage camaraderie with their new colleagues, both remote and in-office.

## Schedule "remote hangouts"

Remote hangouts are exactly what they sound like: hanging out remotely. These are fun, casual, 'watercooler' type conversations designed to replicate the side dialogue employees would have in an office. Hosting these gatherings weekly is a great way to encourage bonding and learning new things about each other. Get creative and make these your own! Fun things we've tried include our own version of 'MTV Cribs' (a tour of remotes' homes), 'What's in your fridge?', funny polls to inspire conversation, and exciting life updates.

## Remote culture onboarding

With a team made up of more than 40% remote workers, we leave nothing to chance when it comes to integrating new team members into our culture. Complete with a detailed slideshow, we discuss our company values, forms of communication, designated working hours, Slack standards, and how we encourage fun and frequent communication between in-office and remote team members.

Welcoming all newcomers into the fold with the same culture training ensures the entire team is on the same page when it comes to key success factors including communication and expectations.

## People Bingo

Encourage new people to interact and get to know each other with a fun game of [People Bingo](). Use Poll Everywhere to survey employees about their unique interests, hobbies, and quirks (this survey won't work if it's anonymous, so inform your participants that their responses will be used to identify them). At your next company gathering, meeting, or outing, randomize the facts and create a Bingo game for your team to play to kick off the event with a fun, engaging icebreaker. Include prizes for extra encouragement!

## Employee recognition

Recognizing your team for all their hard work is a critical piece of the employee engagement pie. Celebrating birthdays, work anniversaries, and special life events has traditionally been done with paper cards full of handwritten praise. Except that in real-life (and in work-life), these celebratory cards leave much to be desired in the form of handwritten anything. The reality looks more like your office manager chasing down coworkers to add their signature, misplacing the card under stacks of paper, and ultimately unable to deliver said card to its intended recipient. And the larger your office is, the more frustrating these challenges become. Paper cards also have the unfortunate drawback of excluding remote workers from congratulating their colleagues.

Welcome to the digital age where e-cards solve all the above problems. The unlimited space and timing e-cards provide can lead to an increase in signatures and more heartfelt comments. With Poll Everywhere, e-cards can be customized to fit the occasion and the recipient's personality (this is a great place to add a fun photo of the lucky employee!). Check out how we [celebrate our team's Polleversaries](#) (work anniversary, in Poll Everywhere lingo).

## Annual remote meeting

At Poll Everywhere, we host [biannual company-wide retreats](#). We use some of that time to gather our remote team members for a collaborative check-in. This is our chance to highlight pain points, address any roadblocks, issues, and gain insight into remote employee satisfaction and where we can make improvements.

Our findings are summarized during an all-company townhall, discussing the pain points that the Operations team can help bridge. "When people realize others share their excitement or concern, camaraderie spreads throughout the company and reminds us that we all carry these emotions inside us.", explains Thoey Bou, Poll Everywhere People Operations Director. This is also a great time to thank our team for the continued efforts of being inclusive of remotes and to remind us all of its importance.

## Remote advocates

Meetings, both big and small, are challenging for remotes. It's vital that they are able to participate productively. Having a designated remote advocate at every big meeting helps ensure remotes' voices are heard when something technical goes wrong, i.e. audio/video doesn't work, there's an echo, etc. Making one person responsible for updating meeting facilitators on any issues keeps communication streamlined.

# Seamless communication

Successful businesses are built on good communication. Poor communication skills between individuals, within teams, and across departments can cause friction in the workplace. This can lead to confusion, frustration, and poor project outcomes. Most importantly, poor communication can be expensive for a business. Very expensive. The Holmes Report noted that poor communication costs large corporations (those with 100,000 employees) roughly $62.4 million a year, which works out to $26,041 in lost productivity per employee. Technology can play a huge role in improving communication between individuals and across teams both colocated and virtually. In fact, technological advancements have been streamlining and improving workplace communication for decades. Here are three key ways technology leads to effective communication:

> **"…poor communication is costing large corporations (those with 100,000 employees) roughly $62.4 million a year, which works out to $26,041 in lost productivity per employee."**

# Asynchronous communication

The complexity of disseminating information increases rapidly as a company grows. Remote leaders must stay tapped into the firehose of information, corralling it if it's not clear or feels too ambiguous, and monitor how effective the team is communicating externally and internally.

**Remote teams face unique communication challenges:**

• Primary modes are written and async

• Higher barrier to verbally communicate with others

• Must gauge critical social cues through the limitations of communication technology

The production of remote team communication can be quite stressful. First, it's necessary to find a reliable communication technology, then coordinate a time with others, ensure it all comes together, and handle the inevitable technology failure gracefully. In the book, (*How to Win Friends & Influence People*), Dale Carnegie suggests one of the most powerful ways to make a great impression is by simply wearing a genuine smile. For remote workers, a broken webcam or spotty internet service could prevent the expression of a radiant smile. Could that have a negative effect on a client or onboarding presentation? Do others think differently of you because you never show your face on camera? These are the questions remote managers must consider since it's so easy to take social interactions for granted.

**Pro tip:** Check-in more frequently than you want to and always default to over-communication, even if it feels slightly uncomfortable. It's worse when the information is not shared and others think it is being withheld.

## Encourage feedback

When employees feel that their voice isn't heard or respected, there's no reason for them to speak up to offer innovative ideas or point out potential problems. This represents a huge lost opportunity for businesses and could quickly lead to stagnation. (Find out more about five companies that excel at employee engagement.) CEOs and company leaders need to know what's happening in their company and how their employees feel. Poll Everywhere's unique approach to employee satisfaction and feedback allows companies to perform company-wide audits that provide valuable insight that leads to solution-oriented dialogue. Design polls with customized questions and anonymous responses so your team can share their true feelings. Improving your company's current level of workplace communication may have a big impact on your workforce's productivity, the satisfaction of your employees, and your bottom line. While communication is a skill each individual employee can cultivate and improve within themselves, the processes and technology you implement in your business can make a big difference in how well your employees and teams understand each other.

## Knowledge sharing

Every company produces vast amounts of important inter-company knowledge, including internal policies, organizational procedures, memos, and product development information. The collective collaboration that knowledge sharing provides is one of the most valuable factors in an organization's success. It enables teams to be strategic, agile, and research and data-driven. A 2004 study from Warwick University highlights the benefits of knowledge sharing, including improved relationships between employees. However, this information is only valuable if it can be easily found and utilized, especially for onboarding new employees. Tools like Notion, Elium, and Helpjuice simplify creating an internal knowledge base that team members can comment on, update, and create all within the dashboard.

# Redefine your People Ops strategy: why safety matters

The rise of employee engagement as a concept dates back to the 1990s with many citing the 1999 management classic, *First Break All the Rules* as the unofficial birth of the movement. Written by then Gallup consultants Marcus Buckingham and Curt Coffman, the book relies on surveys and interviews of 80,000 managers to conclude that employee engagement is necessary to drive company performance.

Today, the idea that employee engagement is key to business performance is far from revolutionary. Not even the most entrenched human resources departments would view

a focus on employee engagement as "breaking all the rules." Though for as far as this thinking has come in the last thirty years, there is still a significant amount of misunderstanding as to what it means to embrace employee engagement as a strategic imperative. Done well, it can change everything.

> **"…there is still a significant amount of misunderstanding as to what it means to embrace employee engagement as a strategic imperative. Done well, it can change everything."**
>
> *Sam Cauthen, COO, Poll Everywhere*

## Employee engagement at its core

At its heart, employee engagement is about recognizing that your employees are people. There's not a "work person" and a "home person." They are the same person, for better or for worse. Employees are full individuals with their own set of motivations and their own set of constraints. This may sound self-evident, but however much we as human resource professionals recognize this truism, so many of the structures, processes, and policies we put in place completely ignore it.

A successful engagement strategy puts individual motivations and constraints at its core, and constructs a system whereby those individual motivations and constraints are in sync with the broader goals, mission, and constraints of the company. It's not that an individual pursuing their self-interest leads to the broader good. Rather, it's that an individual doing work that engages them - that is enjoyable to them - leads to company success.

## What makes people work

So first, what makes work enjoyable and engaging? Daniel Pink in his book, *Drive*, describes the intrinsic motivators that drive us to expend effort. Based on an evaluation of years of social science research, he identified three types of motivators: a sense of autonomy or ownership over the work, an opportunity to mastery of the work, and finally, a sense of purpose or mission broader than yourself.

Neel Doshi and Lindsay McGregor in their work, Primed to Perform, detailed a spectrum of motivators with the following three being the most powerful for driving performance: play or just sheer enjoyment in the work itself; purpose when you value the output of your work; and potential when you believe that eventually the work will lead to something that is important to you. Those three lead to the most engagement in work and the highest work performance.

Keeping those drivers of engagement in mind, here are the most important factors in delivering a successful company employment engagement strategy.

## Know where you stand at the high level

If your organization chooses to embrace engagement as a strategy, you have to be able to define and measure it. You should understand at the aggregate what engages your employees and how well you enable that engagement. You have to know what drives them to excel and what captures their sense of potential. There are a variety of frameworks and tools to assist leaders in understanding the state of motivation analytically and at scale, from the McKinsey Organizational Health Index to Gallup's Q12 Engagement.

If you're starting from scratch and don't have the budget for those tools, you should begin with open-ended interviews and observations of meetings and then use what you learn to inform broader surveys. The goal is to define engagement for your organization and track it over time.

## Begin in the first conversation

These tools will help you understand the overall state of engagement, but the real work of engagement as a strategy begins much earlier. Engagement starts in the first conversation, before a candidate becomes an employee.

Most often talent acquisition is concerned with what the prospective employee can do for the company. The interview process focuses on how well their knowledge and skills meet the requirements of the role and what they are likely to accomplish in the first 30, 60, and 90 days. You may also evaluate "cultural fit" or better yet, "cultural add," but those things are still about what the employee will do for your company.

Equally important to an engagement strategy is understanding what the company can specifically offer to that employee. Part of the recruiter screen should aim to understand what the person is looking for in their next role and a clear headed view as to whether your company and that role can provide it. Let's say there's a candidate who equates professional growth and mastery with getting promoted and managing a team.  If you're hiring for a small, non-hierarchical team where those opportunities are limited, it will be more difficult to engage them over the long term.

# Invest in knowing the individual

Managers have an outsized role to play in an engagement-oriented people strategy. The impact of a manager on an individual employee's motivation and work likely can't be overstated, but there is a significant role for the people operations team to play.

In the employee's first experience with the company, people ops establishes the standards and expectations to be met in the onboarding. They provide tools, communications, and in many cases themselves deliver the company-wide components. This is a tremendous opportunity to underscore engagement. Your onboarding should focus less on rules and procedures, and much more on the company's cultural values and the reasons why people work hard there. Use onboarding to tell the stories of mission, of mastery, and of autonomy that have made a difference to your company and your customers. No one is engaged at work because they know the company handbook.

People ops also has a role in establishing a culture that makes it okay for managers to get to know their employees as people. In researching what makes a manager great, Gallup's 2015 State of the American Manager highlights the following:

*Employees are people first, and they have an intrinsic need for bonding that does not automatically turn itself off between the hours of 8:00 a.m. and 5:00 p.m. The best managers can understand and relate to their team members' inherently human motivations.*

In a people-oriented strategy, people ops can facilitate opportunities for relationships to form through activities and team events. They can serve as a resource to managers in delivering for employees, whether that be through additional training or care packages when a family member is ill. In reviews, HR is well placed to ask questions about individual motivations and morale. With a strong people ops team, these efforts are not dependent on the awareness of individual managers nor are they happenstance. They are part of company operations.

Ultimately, people ops must also be responsible for the boundaries that are important to maintaining professionalism. They set expectations around employee behavior and address failures to live up to those expectations. The consistency people ops provides enables that to happen well.

## Cultivate safety

After extensive research under the name [Project Aristotle](), Google found that the most important determinant of team productivity was the existence of psychological safety. This is a sense of mutual respect and belief that individuals will not be penalized for expressing their views.

The cultivation of psychological safety is a necessary condition to an employee engagement strategy. Not only is there a drain on productivity in its absence, but it's difficult to imagine how you might be people-centered without it. The cultivation of respect and inclusion is the job of all professionals in an organization, but as people ops executes on an engagement strategy, they can take a leading role.

## Invest in shared purpose and shared experiences

Finally, even as the individual is core to an engagement strategy, it is equally important to invest in a sense of shared mission and community. To succeed, a company must be more than a collection of individuals. It must be a system of teams oriented towards the same north star and with a sense of shared history and trajectory.

A sense of mission and purpose is one of the most powerful drivers of engagement. While not all companies set out to save the world, there is something they do that matters to someone. Otherwise, they couldn't exist. While a company's goals are ultimately set by its strategy and its leadership, the answer to the question as to why it matters is in the realm of people ops to articulate and reinforce. Bare this purpose in mind when you plan events and set out policy and layer it into your communication. We're all here for a reason and it's helpful to be reminded.

# Gamify employee engagement:
# 3 unique ways

Company culture is significant to any business – happy employees are [12% more productive](#) and effective at time management. How about scaling your company culture to the next level using Poll Everywhere? Poll Everywhere's various poll types, such as [Q&A's and multiple choice questions](#), allow for seamless employee engagement. Here are three unique ways (inspired by [Waynesburg University Statistics Professor](#) Erica Chauvet) you can use Poll Everywhere to scale your company culture and create a fun and interactive environment.

> **"Company culture is significant to any business – happy employees are 12% more productive and effective at time management."**
>
> *Department of Economics at the University of Warwick*

## Play an improv game

With Poll Everywhere, you can gather live audience feedback. But how about turning the tables and reacting to the audience in real-time? Engage your team with a fun and interactive improvisation game.

• Select four to five volunteers to play as the improv 'actors'
• Select one moderator who will share questions via Poll Everywhere
• The audience controls the story's direction by answering the questions

**Poll questions can be multiple choice with options like:**

What setting should the actors be in?

**a)** Waiting at the DMV

**b)** Self-checkout line at Target

**c)** Grandma's kitchen

**Or open-ended poll types like:**

*What is the guiding sentiment of this scene?*

*What is Character A's hidden talent?*

*What is the relationship between Character B and Character C?*

Continue the game with a variety of questions and switching participants so everyone gets to participate. An improv game is a fun way to develop your employees' presentation skills, ability to think quickly, and function as a team.

## Host a game show

Poll Everywhere's Competitions – the exciting poll type that allows presenters to ask a series of questions and lets participants compete to answer the fastest. Instead of asking a simple multiple-choice question, why not gamify the experience by turning it into a game show?

• Choose one person to be the host; (Jeopardy wouldn't be the same without Alex Trebek)
• Select three individual participants to play the game
• The audience plays as the 4th participant

Don't worry about downloading Jeopardy PowerPoint templates, integrate your Poll Everywhere Competition into any presentation. Test the participants by asking fun trivia questions such as:

• Pop culture: What was the highest grossing film in 2019?
• Company culture: What are our four core values?
• Product facts: What was the name of our latest product update?

Incentivize your employees with prizes like $50 gift cards for the winner of the game show. Using Competitions will make any company presentation exciting and encourage active engagement from your team.

# Lead a company variety show

Variety shows are a fun and friendly competition style to try at your next company event. Test your employees' knowledge and improve employee engagement by incorporating live voting and ranking with Poll Everywhere.

• Select a handful of volunteers to participate in the pageant and one moderator to deliver questions.

• Structure the variety show with 3-4 segments.

• Use Poll Everywhere's ranking poll type to list each participant.

• After each round, the audience should upvote the participant they felt aced that round.

• By the end, the participant with the most upvotes will be the winner!

**Be creative and switch up the segments. Segments can include:**

*Interview Segment*

Participants will be asked basic behavioral questions similar to those asked in a job interview. This segment is designed to introduce participants to the audience and give a good first impression.

**Examples include:**

• Tell everyone about yourself.

• What are your career goals?

• What are your hobbies and interests?

*Company Knowledge Segment*

The company knowledge segment is designed to see which participant has been paying attention during those all-hands meetings or town halls! Ask each participant a set of company-related questions.

• How many new employees did we hire in 2019?

• What sales goal did we achieve by Q4?

*Brain Teasers Segment*

Test your participants' ability to think critically on the spot by asking brain teasers! Audience should judge based on how well the participant can articulate their thought process and how logical the process is.

• What's the market size for residential light bulbs in the US?

• How many ping pong balls could fit in a Boeing 747?

• Explain the internet to someone coming out of a 30-year coma.

*Talent Segment*

What is a variety show without a talent segment? Participants should prepare a special talent to win the hearts of the audience. Talents can range from dancing to magic tricks. May the best performer win!

Use the Poll Everywhere open-response poll type to encourage the audience to contribute their own questions. Incentivize your employees to participate while also giving back to your community by offering a prize in the form of a charitable donation. Winner of the variety show can pick a charity of their choice to donate the prize to.

Amp up your next company event by incorporating these three unique ways to use Poll Everywhere. Scale your company culture to be the fun and interactive workplace that your employees deserve.

**Section 3:**

# 2020: A clear vision for enterprise

# Top tech trends and tools

The business benefits of cross-functional communication and collaboration gained traction in 2019 and will continue in 2020. With the rise of diverse and widespread teams, authentic and effective communication is critical to the success of any business. Rebecca Kerr, a content and conversation strategist for the Design Transformation team at InVision, designs transformative workshops and keynotes around live audience response questions. She sometimes uses Poll Everywhere to uncover a prevailing sentiment within the group and to find ways to work together to find common ground. "Every product organization has to deal with breakdowns in communication between design, development, and business. They're trying to find better ways to collaborate quickly across functions, but it's hard to get everyone speaking the same language. There is so much potential for them to have more focused, purposeful conversations with a tool like Poll Everywhere. Poll Everywhere may not be well known for its use in product organizations, but it should be."

Another trend that will continue in 2020 is cloud-based software. Many technology companies are releasing cloud-based software and applications that streamline and automate workflow management, communication, and data sharing. In 2020, productivity and efficiency are huge competitive advantages that companies should strive to optimize, but what tools can we incorporate to be successful at this?

As a technology company focused on building highly functional and collaborative teams, we have a few ideas:

# Work management

As your company grows, it is critical to have efficient management tools in place to track, prioritize, and manage workflows and projects. Many experienced managers may point you to old-fashioned GANTT charts for project management. However, the latest workflow management technologies are online platforms such as Workfront, Asana, Pivotal Tracker, and Airtable. These management software platforms are perfect for the modern workplace.

In addition to project management software, online collaborative workspaces such as Basecamp and Notion are useful tools for collaboration and building databases. Employees can share ideas, track their tasks with due dates, and collaborate with team members. Managers can keep up to date with every project and management workflow. This is incredibly beneficial for companies with remote workers, as managers can see what projects remote employees are currently working on.

These platforms also have great automated features such as due date reminders, project synchronization, and more. Asana, for example, has "rules" which can be customized for each board to allow for different automated tasks such as automatically assigning every new task to a specific person. These project management tools are crucial to improve efficiency across any team.

# Extended Reality - Augmented and Virtual Reality

Extended reality (XR) is an umbrella term for all computer-generated graphics that blend real and virtual environments such as virtual reality and augmented reality. Companies like Niantic Labs are currently leading the way in virtual and augmented reality games, but others such as Oculus and SkillReal are bringing their XR technology to enterprise. Many companies are using VR to conduct training, data visualization, construction, and manufacturing. For example, Walmart is using VR technology to simulate situations and train their employees in areas of customer service, new technology, and compliance. Companies like IKEA and Amazon are integrating AR into their mobile applications to allow customers to place furniture and other products in their homes. These examples merely scratch the surface of potential use cases of XR technology. Expect to see even more innovative enterprise applications of this technology in 2020.

## Scheduled content

Staying up to date with the latest trends in digital marketing is crucial for maintaining your brand awareness. Social media and email marketing are undeniably important but can be the most time-consuming parts of digital marketing. Software like [Hootsuite](), [Buffer](), and [MailChimp]() make drafting and scheduling social or email easy. Your content marketers have the flexibility to schedule posts weeks in advance and plan according to holidays and themes.

## Company communication

Efficient teamwork starts with efficient communication. In 2020, cloud-based instant messaging applications will continue to be a major trend. Companies like [Slack](), and [Wrike]() are rapidly improving their messaging platforms by providing enterprise-specific systems that promise security and easy company-wide communication. Both small and large organizations can benefit as teams can easily create channels to discuss specific topics and collaborate on new projects. Remotes or employees who work from home can stay in touch with the entire company with the same ease as speaking in person. Employees can chat across departments and small company-wide announcements can be shared.

## Data Sharing

According to [Siemens]() CEO Joe Kaeser, "Data is the oil of the 21st century." Going into the new decade, enterprises need to improve their data ecosystems if they want to keep up with big data. In the era of privacy concerns, enterprises need to develop a trust mechanism that can manage the exchange of data between consumers and the enterprise. In 2020, companies may look to blockchain-based systems to handle these exchanges such as the [IBM Blockchain Platform](). Blockchain is a [distributed ledger technology]() that stores and records transactions that cannot be tampered by participants. Rules called smart contracts can be used to automatically sort and define transactions. Blockchain can [securely log and transfer]() sensitive personal information in a seamless and secure manner.

# Artificial Intelligence-as-a-service and Automation

Automation, specifically robotic process automation (RPA), is poised to be implemented by 40% of enterprises in 2020, with spending increasing to $1.5 billion. RPA is technology that is trained with business logic and inputs to do repeated tasks and routines. Tasks range from automatic responses to bots who can conduct specific jobs. RPA is beneficial in automating low-value tasks, thus reducing human error and cost of staffing. One commercial bank was able to reduce staffing costs by 30% and saw a 27% increase in tasks done correctly during the first try. As we enter 2020, RPA continues to improve with the integration of machine learning, natural language processing and other artificial intelligence software.

When we think of artificial intelligence, we often think of Sophia the Robot or Google Deep Mind. While a talking robot or an expert Chess player are fascinating, they are merely entertaining applications of artificial intelligence. Entering a new decade in 2020, what are the practical applications of artificial intelligence that can be adapted for Enterprise? The realistic vision for 2020 is AI-as-a-service. Currently, $12-15 billion is spent on AI in the enterprise market, with IBM, Google, Amazon and others dominating the market. Artificial

intelligence algorithms are exceptionally complex, powerful tools for customizing and streamlining operations. We may see the rise in AI-as-a-service companies engineering tailored algorithms designed to share, upload, and analyze data. With enough data, AI systems are capable of redefining professional services such as legal or accounting by analyzing contracts and managing bill payments. AI can provide data-driven insights that streamline decision-making processes and personalize the customer experience.
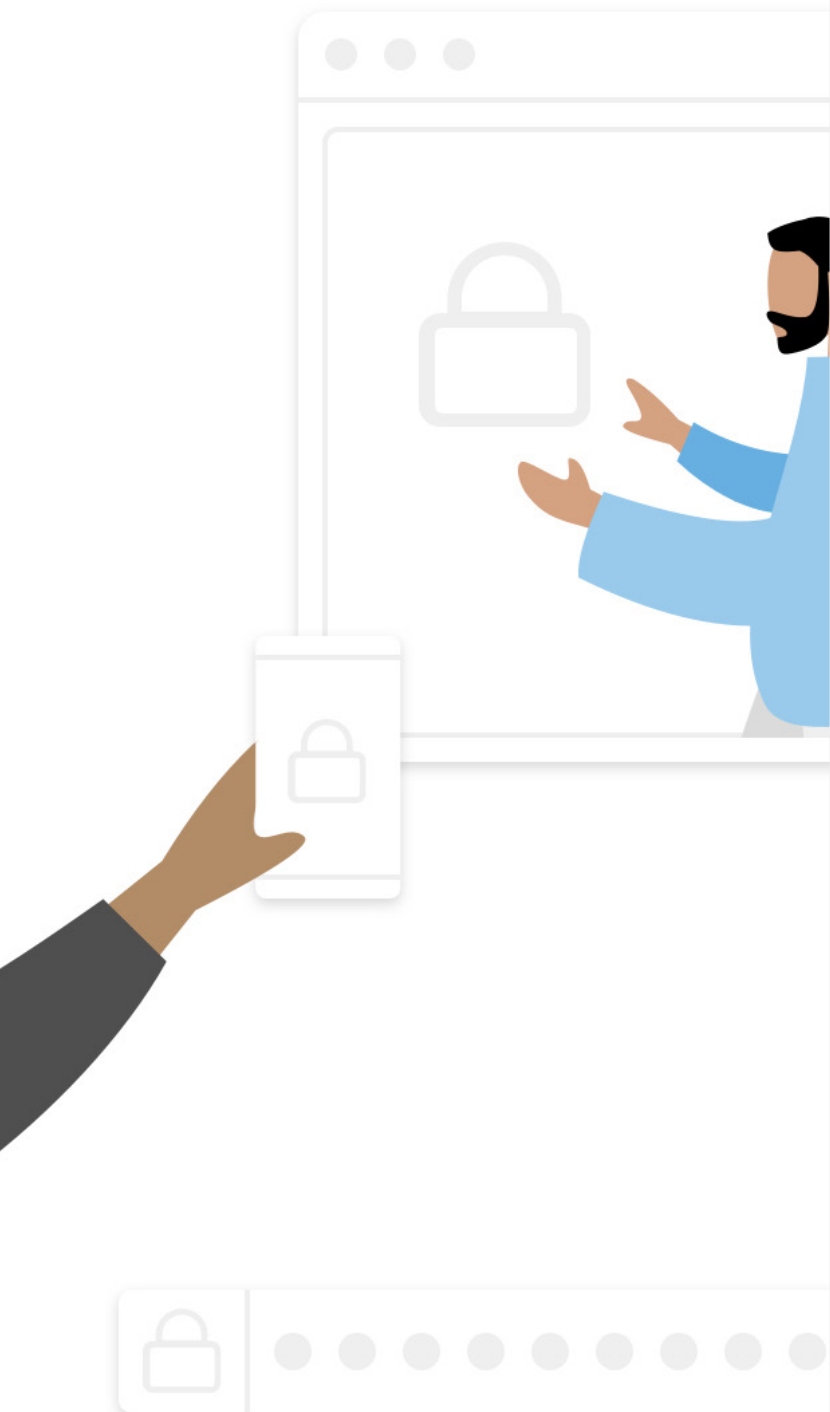
# Cybersecurity

As we become more data-driven, cybersecurity will continue to be top of mind for consumers and businesses alike. A key component of a safe and secure program is successfully training your team on cybersecurity. To bring you the most up to date and accurate security training guidelines, we consulted Poll Everywhere Ruby Engineer, Lucas Nicodemus. Lucas helped spearhead our recent SOC 2 Type 1 certification achievement. (Learn more about our updated security features). Here's what he had to share:

Implement Poll Everywhere to teach meaningful security lessons with minimal time, overhead, and effort. To effectively educate your team, focus on the most effective learning practices: spaced repetition, formative assessment, and avoiding PowerPoint boredom.

> **"Implement Poll Everywhere to teach meaningful security lessons with minimal time, overhead, and effort."**
>
> *Lucas Nicodemus, Ruby Engineer, Poll Everywhere*

# Spaced repetition

**Core principle:** Space out learning on a curve so that employees are familiar with security principles on an optimal "forgetting curve." In initial training, emphasize core points multiple times, interweaved with specific examples of security principles. In security training, the philosophy should be used as an introduction, ex: why threat modeling is important for our company, with specific examples of that philosophy spaced out and interwoven into the rest of the training.

*Example lesson:*

• Topic introduction: "We need to keep a permanent record for regulatory compliance"

• Action statement: "Forward items of regulatory importance to company security email address"

• Content: Show instances where approach is important, e.g., examples of phishing emails

• Introduce the following topic: "Don't use removable media to avoid viruses and hardware damage"

• Action statement: "Use alternatives to removable media"

• Re-introduce the first action statement: "Forward items of regulatory importance to company security email address"

Space out your slides so that the most meaningful principles and action points are repeated the most. Initially with short slide to slide intervals, and then with content gaps for other information and less important examples.

After the training, continue using the spaced approach by reminding employees of specific security risks and attacks through all-hands meeting announcements, daily announcements, and semi-annual security refresher presentations.

Design the program to be easy for newcomers to understand while still being useful to employees with high tenure. For example, annual refreshers should provide unused examples of attacks that existing employees are already familiar with, while interwoven with general advice that is always topical.

As Sean Kang states in his research article on effective learning, "In short, spaced repetition enhances the efficacy and efficiency of learning, and it holds promise as an educational tool."

# Formative quizzing

**Core principle:** There are two different approaches to training employees on security principles:

• Self directed training

• Guided training

Self directed training is useful for distributed learning, but the learner can be easily distracted. Many people believe they have a "better than average" knowledge of security which can cause them to tune out important security concepts.

A better approach is to use a more traditional guided environment that requires audience participation. This environment discourages multitasking and prevents the participants from easily becoming preoccupied and distracted.

# Avoid PowerPoint boredom

**Core principle:** Poll Everywhere's ability to combine content with live response questions makes it a great interactive alternative. Ensure that your team understands their responses are anonymous and for practice only. Regularly use formative quizzes throughout the content as presented.

*Example lesson:*

• Topic introduction: "Removable media is discouraged"

• Rationale: "We don't want to have our computers taken over by viruses"

• Formative quiz: "What are the risks of using removable media?"

• Answers: "Can be used to deliver viruses"

In the last example, both answers are correct. For questions with only one right answer, like "where do you report security questions to?", use the following workflow to emphasize the benefits of formative assessment:

• Permit changing answers. Audience members should be able to respond and correct themselves.

• Show the correct answer and encourage audience members to update their answers accordingly. This reinforces the "no penalty aspect" of the exercise, as well as enables employees to have a positive experience even if they initially respond incorrectly.

Combine formative assessment and spaced repetition for maximum benefit. As formative assessments progress, change the questions to be less focused on "all correct" answer choices and move them towards more traditional quizzes while keeping the stress of the situation low: questions can be difficult as long as participants are able to change their answers to join the in-group rather than feel like outsiders.

## Assessing employee knowledge

**Core principle:** Conduct a more summative assessment of employee security knowledge for effective training and to satisfy compliance. It's necessary to demonstrate the training worked and that employees were able to pass a rudimentary assessment of policy and best practice.

Poll Everywhere Competitions can be a fun way to build a compliance quiz. Design the quiz to have correct answers and to be constrained on time and resources. Before starting, re-enforce that you've switched and that this is the important quiz where answers count. Emphasize that wrong answers really are important.

Set an expectation for success and failure: success means that you successfully completed the training and failure of the quiz will result in an entire repeat of the meeting. Make sure you have registered participants on when giving a competition based quiz, and permit employees to set a screen name that isn't their real name.

Research states, "Employees enjoy meetings when they have a clear objective, and when important relevant information is shared. Consistent with conservation of resources theory, most employees are unhappy with meetings when they reduce their work-related resources (e.g. meetings constrain their time, lack structure and are unproductive)."

It's in everyone's best interest to participate in the training, get a good score, and be signed off on.

## Documenting your results

Use spaced repetition techniques to deliver clear and concise policy and best practice advice over multiple slides, repeating as necessary while interweaving knowledge to create distinct and understandable knowledge units. Finally, administer an assessment.

After your presentation, use reporting tools to demonstrate to regulatory agencies that the training was successfully completed. Provide an executive summary report that shows high-level overviews of the company status. This can help adapt future training to focus on content that was most missed.

Use a gradebook report to document that the training worked: you'll know exactly who participated and how well they scored. Save the results, and you'll have completed a training program.

# Customer collaboration: the benefits of interactive SKOs

Customer collaboration will be at the forefront of 2020 and should form the heart of your sales strategy. Think interactive SKOs, collaborative brainstorming sessions, and purpose-driven strategy meetings. To get the inside scoop on building successful sales relationships through customer collaboration, we sat down with Poll Everywhere Account Executive Matthew Cooper. Here's what he had to share:

Your organization's relationship with its customers is critically important. Most companies fall into a few "proven" communication patterns to interact with customers through their lifecycle. The efficacy of these communications is usually assessed through after-the-fact metrics like deals-won, churn, and lifetime value – and customer needs are often gained through sparsely completed digital surveys.

Rather than relying on a few stale communication channels and feedback tied to $25 gift cards, expand the narrative to drive better conversations and gain actionable insights.

> **"By inserting dynamic content such as fun ice-breaker questions you break the PowerPoint fatigue and engross your audience in the information you want them to absorb."**

## Make customer presentations interactive

By inserting dynamic content such as fun ice-breaker questions you break the PowerPoint fatigue and engross your audience in the information you want them to absorb. You spent money to get this meeting, and money to show up, make every second count by getting your customer or prospect to contribute their thoughts and attention.

## Get a pulse of the room

Nothing is worse than spending 45 minutes presenting information that your customer already knows – or worse doesn't care about. Use interactive questions to gauge where they are in the process, to guide the conversation, and make each presentation customized directly to their needs. Plus, you never know what treasured information your customer will reveal if they're anonymous!

## Build fun into for-profit training or accreditations

If you offer paid training for your customers, there's no excuse for it to be dull. When customers are spending good money to upskill their workers on your platform – use it is an opportunity to both educate and entertain. Fun trivia-style competitions can make trainings or certifications fun and memorable. Remember, you can have people retain information and get prizes at the same time.

## Build actionable data for organizational, process and product change

When organizations use a tool to conduct the three customer communications above, they're gathering data in the moment – but they're also gathering data over time. Imagine if you had the most common sales objections from over 100 sales dinners all in one place? Or the most common product concerns from the last 2 years of product training? Using tools to leverage quality conversations in the moment allow you to aggregate that data over time and make decisions on a macro level.

# Closing thoughts

As the digital landscape becomes more diverse, complex, and widespread, your technology toolkit will become even more essential to the efficiency and success of your business. 2020 brings an increase in remote workers (over the next 5 years, 42% plan to increase their remote work), immediate collaboration, and instant engagement. As location becomes less relevant for remote and hybrid teams, it is essential to maintain control over your brand, training processes, company culture, and unique strategy. That's why we redesigned our key enterprise and security features. From controlled user access to unlimited teams and shared activities, our new enterprise features will help you keep employees engaged and support your team to facilitate more productive and efficient meetings. Poll Everywhere makes it easier than ever to promote collaboration, maintain brand consistency, and keep data secure all from one place. Learn how our enterprise features can support your business' unique needs and allow you to create, present, and control consistently.

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**Remote team management**

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