

Tax Assist Accountants Growth Academy

6th June 2024



Humanise the Numbers

Challenge – Connect – Transform

Change

OUR VALUES & BEHAVIOURS

- Choose high standards
- Focus on value first
- Get off the fence
- Make their day

- People and planet centred
- Make a difference
- Earn the right – serve well
- Foster constructive criticism

Be worthy of notice

Do worthwhile work

Humanise the numbers

Be wholehearted

- Team first
- Love what you do; have fun doing it
- At the edge – learning
- Be there



Why are we doing this?

- **Standing still is not an option!**
- **Change is inevitable**
- **Managing change means we tackle things on our terms**

Today's agenda...

- **Accountability – follow-up**
- **Your burning issues?**
- **Gallup Q12 – team engagement**
- **5 levers of growth – where next?**
- **Action planning**
- **Next meeting, next steps**

Accountability

What did you tackle after the last session, and what was the outcome?

What did you learn?

Your story pyramid

RemarkablePractice
Helping Ambitious Accountants Humanise the Numbers



Growth & Marketing

The 5 levers of growth

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1. Team engagement

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The 5 levers of growth

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2. Service offering

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1. Team engagement
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3. Client selection/deselection

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The 5 levers of growth

1. Team engagement
2. Service offering
3. Client selection/deselection
- 4. Efficiency**

Growth & Marketing

The 5 levers of growth

1. Team engagement
2. Service offering
3. Client selection/deselection
4. Efficiency
5. Price/value delivery

Lever No. 1 – Team engagement

As measured by Gallup Q12

Gallup Q12 survey

What it is...

1. Hopefully an honest reflection of employee engagement
2. A score of a moment in time, like a balance sheet
3. An opportunity to listen, to learn and to act

Gallup Q12 survey

What it is **not**...

1. A stick with which to beat people!
2. An exercise in over-analysis – accept the score and devote your energy to acting on it
3. A cynical one-off exercise

Gallup Q12 survey

Why is employee engagement important?

Consider the following...

Gallup Q12 survey

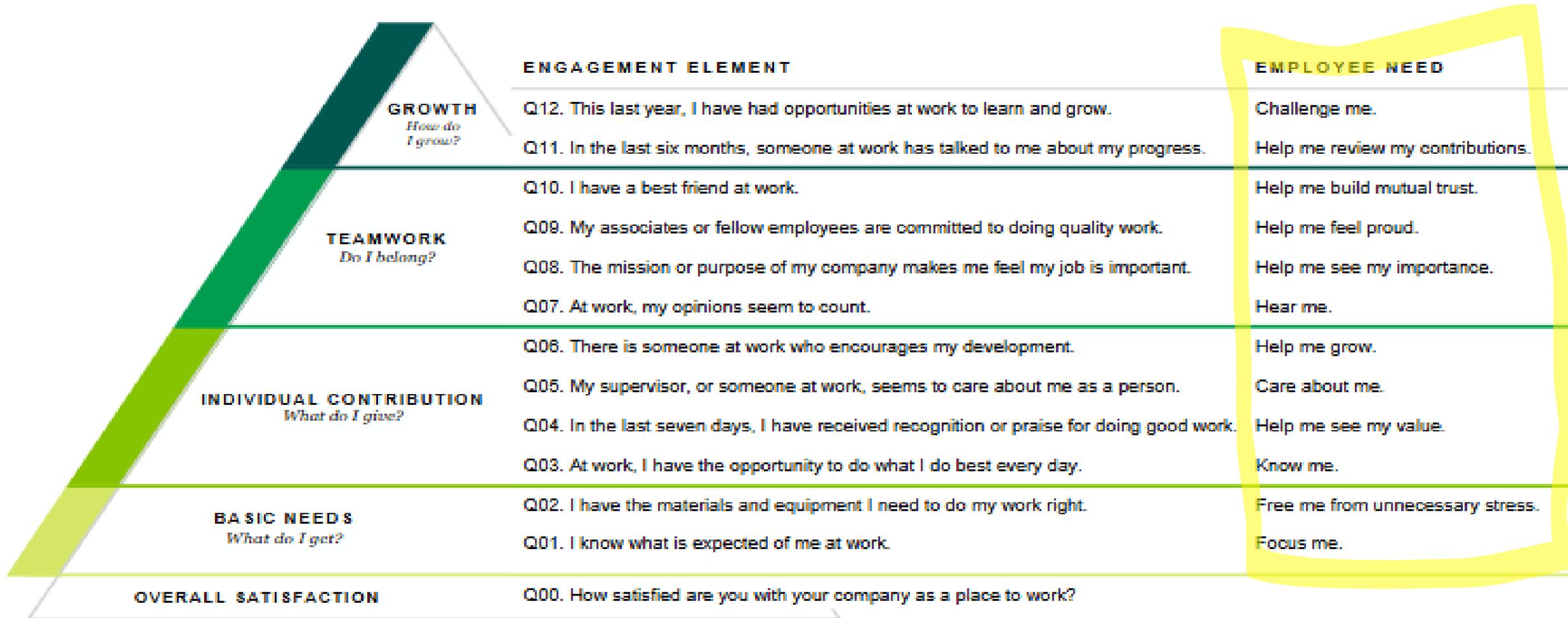
Q1. What happens when our employees are **more engaged** at work?

Q2. What happens when we **fail to improve** engagement at work?

00. How satisfied are you with your company as a place to work?

1. I know what is expected of me at work.
2. I have the materials and equipment I need to do my work right.
3. At work, I have the opportunity to do what I do best every day.
4. In the last seven days, I have received recognition or praise for doing good work.
5. My supervisor, or someone at work, seems to care about me as a person.
6. There is someone at work who encourages my development.
7. At work, my opinions seem to count.
8. The mission or purpose of my company makes me feel my job is important.
9. My associates or fellow employees are committed to doing quality work.
10. I have a best friend at work.
11. In the last six months, someone at work has talked to me about my progress.
12. This last year, I have had opportunities at work to learn and grow.

The Items That Matter for Engagement — Gallup's Q¹²®



Engagement Segments Within Global Workplaces

2

Measure

Employees can be segmented into three fundamental psychological conditions of engagement that are behaviorally predictive.

18%

ACTIVELY DISENGAGED

Actively disengaged employees aren't just unhappy at work — they are resentful that their needs aren't being met and are acting out their unhappiness. Every day, these workers potentially undermine what their engaged coworkers accomplish.

59%

NOT ENGAGED

Not engaged employees are psychologically unattached to their work and company. Because their engagement needs are not being fully met, they're putting time — but not energy or passion — into their work.

23%

ENGAGED

Engaged employees are highly involved in and enthusiastic about their work and workplace. They are psychological "owners," drive performance and innovation, and move the organization forward.

2023 Gallup World Poll, Global Employee MCE ±1 point. Percentages for best-practice organizations are averages across 2022 Gallup Exceptional Workplace Award winners; percentages reflect the year that Gallup collected the winners' engagement data (2021) — not the year that Gallup named the award winners.

Employee Engagement

Employee engagement is the involvement and enthusiasm of employees in their work and workplace. Employees can become engaged when their basic needs are met and when they have a chance to contribute, a sense of belonging, and opportunities to learn and grow.

Engaged employees:

- know the scope of their job
- thrill in the challenge of their work every day
- are in roles that use their talents
- always look for new and different ways of achieving the outcomes of their role

ENGAGEMENT



SATISFACTION

Gallup Q12 survey

Only 14%

of employees strongly agree that **conversations in their workplace inspire them to improve.**

Only 48%

of managers strongly agree they currently **have the skills needed to be exceptional** at their job.

GALLUP

Gallup Q12 survey

- 1) Promote Mission and Purpose
- 2) Measure Engagement
- 3) Be Prepared to Take Action on an Engagement Survey
- 4) Develop your Managers
- 5) Check in on your managers

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Gallup Q12 survey

Performance Management

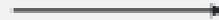
What future workplaces want and need

1

Purpose

THE PAST

My Paycheck
My Satisfaction
My Boss
My Annual Review
My Weaknesses
My Job



MOVING
FROM
BOSS TO
COACH

THE NEW WORKPLACE

My Purpose
My Development
My Coach
My Ongoing Conversations
My Strengths
My Life

Gallup Q12 survey

You Can Start by Assessing Your Own Engagement

There are aspects of your engagement that are in your control and that you can improve.

- What are the ingredients for a great day at work for you?
- What have been your main successes at work during the past six months?
- How do you best contribute to the success of your team and/or organization?
- What is one workplace need that is a priority for you right now and why?

Client focus

What are your moments of truth with clients?

How can you improve these moments of truth?

Accountability focus

Action planning

O A R B E D

Ownership

Accountability

Responsible

Blame

Excuse

Denial