

Explore all of the factors that influence success.

## *Step 3: Fact Finding & Involvement*

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### *Explore External Factors That Might Have A Bearing On Success*

With an understanding of the audience's motivational state in relation to your organization, the next step is to understand the playing field in which your audience works.

What business conditions, internal problems, training deficiencies and marketing challenges not only affect your business but also the outcome of your program? To measure the return on investment of an incentive program, it pays to anticipate (from the beginning) any and all external factors that could affect results. For example, an economic decline or recovery, higher or lower interest rates, the actions of a competitor, an upcoming management change, a major layoff, etc. At the end of the program, you'll be able to see if any of these or other factors weighed in on results – and with far more credibility than if conducted purely post-facto.

### *Define The Key Actions Required To Yield Results*

The fact-finding process also lies at the root of identifying what actions, if increased, will yield the desired result. You need to find out how motivation can drive the behaviors your objectives require and what obstacles potentially stand in the way. This step often includes employee involvement programs or focus groups with consumers to determine what the targeted audience can do (or not do) to help achieve program goals. Making that determination helps ensure that the program addresses whatever hidden factors might stop people from doing the things you need them to do. The output of this process provides the basis for developing the program structure by confirming the specific actions by the specific audience that can lead to the specific results.

This process also involves looking at how the targeted audience might interact with other audiences in a way that could affect achievement of goals in a positive or negative way.

## ***The Nominal Group Technique***

For consumers, the process of using focus groups is well understood. Many organizations overlook a similarly useful tool for developing employee and channel-partner programs.

Audience participation, properly solicited, can provide invaluable insight into the human elements that can affect your performance improvement efforts. The *Nominal Group Technique* is utilized in many variations but is well articulated in “*The Master Measurement Model*,” developed by the American Productivity & Quality Center for The Incentive Research Foundation (formerly known as the SITE Foundation). This involvement process is designed to yield the specific information you need about the obstacles your target audience faces in reaching your goals and the manner in which you can remove those obstacles and generate positive actions.

### ***How To Start***

The process starts by finding a trained facilitator from outside the specific group you are involving in the process. The facilitator can come from the human resources department or an outside consultant. You do not want someone who seems like a surrogate for management.

### ***Ideal Group Size***

The ideal group size comprises from six to 10 people representing various elements of your audience and personality types. You want to make sure everyone involved, both quiet and outspoken, is represented at the table.

### ***Initial Positioning Statement***

The facilitator candidly explains: (1) his or her role is to identify the means by which the organization can achieve its goals and the obstacles standing in the way; (2) the session is intended for research only; and (3) that management will weigh all factors in the design of the performance improvement program.

## ***Questioning Process***

For each question, the facilitator uses a ‘round-robin’ approach, going around the table clockwise or counterclockwise, asking the same question of each person. Each person can take a pass if desired. At the outset, participants are discouraged from making emotional responses to each other’s answers, so as not to inhibit open communication. The facilitator writes down each answer for all to see, even if it is a duplicate.

### ***Questions To Ask***

Questions that the facilitator should pose include the following:

***Q. What goals do you consider reasonable?*** This helps your organization better understand what your audience will buy into as reasonable. If people do not believe themselves capable of success, they are less likely to participate.

***Q. What obstacles stand in the way of achieving those goals?*** This helps you identify deficits in product, distribution, service, competitiveness, general workplace dissatisfaction, pricing, etc., that could affect your desired outcomes.

***Q. What actions taken by the target audience, if taken more often or efficiently, will yield the desired result?*** This helps you identify the processes your program will need to follow to have the desired outcomes.

***Q. How can these actions best be measured? What measures of these desired actions already exist, if any?*** This helps you determine feasible performance measures.

## ***Reaching Consensus***

For each question, the facilitator continues until the group has run out of ideas. Then, the facilitator leads a discussion to root out the duplicate answers and to make sure everyone understands the answers that remain. For each question, each participant selects the three favored answers, and a vote is taken to determine the relative popularity of each answer. This yields the group’s recommendations.

The final report usually provides the three most favored answers to each question, as well as all of the discarded ideas (in case a gem is getting tossed out).