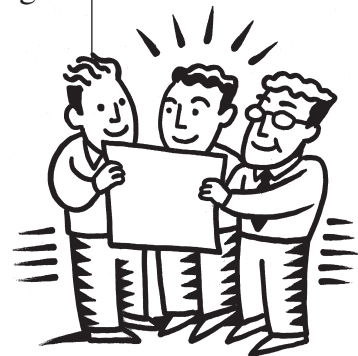# Recognition Planning Checklists

I n this section, you will find checklists drawn from the content of each of the chapters in this book. These checklists can be used to guide your individual, team, and organizational recognition activities and programs as well as to quickly review important points covered in this fieldbook, identified by chapter.

You can use them before, during, or after a recognition effort—as a way of double-checking your priorities during the planning phase, for anticipating problems, or for evaluating the effectiveness of your effort.

CHAPTER 1 CHECKLIST
The Rewards and Recognition Revolution

❑ Many people feel that recognition is common sense, and falsely believe that their organizations already do a great deal to reward and recognize employees.

❑ Five important trends have led to the increased importance of recognition:

    ❑ Decline of traditional incentives

    ❑ Rise of nontraditional incentives

    ❑ Increased use of variable compensation

    ❑ Increased employee empowerment

    ❑ Increased change and uncertainty

❑ Recognition and performance should be closely linked.

❑ Effective recognition has a bottom-line impact.

❑ The use of employee incentives is changing dramatically:

    ❑ From one-size-fits-all to multiple programs and activities

❑ From centrally oriented to manager-oriented programs

❑ From formal and stuffy programs to programs that are informal, spontaneous, and fun

❑ From few choices to many options that constantly change

❑ From infrequent use to greater frequency and flexibility

❑ From cultures of entitlement to cultures of performance

❑ From selective use for top performers to use for everyone

❑ Recognition offers a low-cost strategy with a big-bang effect on morale, performance, recruiting, and retention.

❑ Some final (and reassuring) thoughts:

    ❑ Recognition works.

    ❑ Virtually everyone would benefit from increased recognition use.

    ❑ Learning to use recognition effectively is not difficult.

CHAPTER 2 CHECKLIST
The Salary Fallacy and the Seven Facets of Recognition

❑ Managers and employees differ significantly in what they perceive as the most rewarding aspects of employees' jobs. Ask most managers what his or her employees want from their jobs, and you'll probably get a list of items heavy on financial incentives such as increased pay, bonuses, promotions, and so forth. Ask most employees what they really want from their jobs, and you'll likely get very different answers.

❑ Although most people come to work because of money, they don't work just for money.

❑ The money employees are paid is compensation.

❑ Recognition is not compensation; it's what you offer employees above and beyond compensation to get the best effort from them.

❑ Motivators differ significantly from employee to employee.

❑ Money is a basic need, but it really isn't a motivator.

❑ The seven key aspects of recognition are:

   1. Contingency

   2. Frequency

   3. Timing

   4. Formality

   5. Setting

   6. Significance to provider

   7. Value to recipient

❑ Recognition is most meaningful when it is performance-based, given promptly, given frequently, given informally, given in the appropriate setting, and valuable to both provider and recipient.

❑ The most effective incentives to employees are manager-initiated rather than organization-initiated, and are contingent on performance, not just on showing up to work.

CHAPTER 3 CHECKLIST
Why Managers Use and Don't Use Recognition

❑ Employees expect to be recognized when they do good work.

❑ As Bob Nelson found in his doctoral research, the major determinants of the frequency of recognition giving are:

  ❑ Sense of personal responsibility for giving recognition

  ❑ Skills and confidence in giving recognition

  ❑ Past reinforcement for recognition use

  ❑ Age of the recognition giver

  ❑ Role models

❑ Managers who use recognition frequently tend to see it as part of their job, and have developed skills and confidence in those skills, have received reinforcement for their previous recognition efforts, are under fifty, and have had a high-use-of-recognition role model.

❑ In addition, Bob found that:

  ❑ Time constraints are not a major factor in frequency of recognition use.

  ❑ Managers are concerned about not giving recognition fairly.

❑ Business pressures reduce the likelihood that recognition will be given.

❑ Budget and resource constraints do not significantly affect the recognition giving of high-use managers.

❑ A program for increasing recognition use must address the six major excuses for not giving it:

  1. "I'm not sure how best to recognize my employees."

  2. "I don't feel that providing recognition is an important part of my job."

  3. "I don't have the time to recognize my employees."

  4. "I'm afraid I might leave somebody out."

  5. "Employees don't value the recognition I have given in the past."

  6. "My organization does not facilitate or support recognition efforts."

❑ When converting managers who seldom use recognition into managers who often use recognition, small-step improvement works best.

CHAPTER 4 CHECKLIST
The Context for Recognition

❑ Differentiate *task* versus *context.*

❑ All recognition occurs in a context.

❑ The context has a major impact on recognition effectiveness.

❑ The major contextual factor is *culture.*

❑ Values create culture; culture determines practices.

❑ Remember that the "ground" (organizational context) determines how people perceive the "figure" (recognition).

❑ *Motivators* are major positive contextual factors (for example, action, fun, variety, input, stake-sharing, choice, and responsibility).

❑ *Demotivators* are major negative contextual factors (for example, unclear expectations, unnecessary rules, poorly designed work, unproductive meetings, constant change, dishonesty, and unfairness).

❑ Be careful about "noise" (extraneous things going on in the organization) that can detract from the "signal" (your recognition initiative).

❑ Rewards that are too powerful can obscure the recognition that should be communicated.

❑ Avoid the potential sabotage of recognition programs by understanding and adapting to the context.

❑ Create a conducive personal environment for recognition.

❑ Use context assessment tools.

CHAPTER 5 CHECKLIST
The Recognition Cycle

❑ Recognition is much more than a single skill; it is a collection of closely related knowledge, attitudes, *and* skills.

❑ The right knowledge and attitudes enable the right skills. These skills should then produce the right behavior, and the right behavior should produce the desired results.

❑ All learning involves risk—risk of failure, risk of feeling stupid, risk of wasting time.

❑ Anyone can become competent, but individuals do not necessarily become competent at the same rate. Some people learn more quickly than others. It is the speed of learning—not the capacity for learning—that distinguishes one person from another.

❑ It is all too easy to give up early in the learning process; the inevitable discomfort of conscious incompetence often leads to resignation.

❑ While everyone has the capacity to achieve a high level of competence, not everyone becomes an expert.

❑ Habits are both positive and negative forces in learning: People will continue *not* giving recognition, if that is their habit, or they will continue giving the same forms of recognition over and over again until there is some impetus to change.

❑ It's very easy to fall into a pattern. This can lead to recognition that appears mechanical—and *nobody* wants to be recognized mechanically.

❑ Fear of making mistakes, and looking bad, causes many people to shy away from learning new things.

❑ As people move up the learning ladder to higher and higher levels of competence in recognition, the learning path is not usually a straight one. Probably the best way to think about learning is in terms of a PDRI cycle. PDRI stands for: **Plan**, making a decision or intention to take some action or perform some activity; **Do**, performing the action or activity; **Review**, assessing how well the action or activity worked; and **Improve**, refining the action or activity to make it even better when it is next used.

❑ There's only one way to get better at anything—including giving recognition—and that is to practice it, using feedback to improve.

❑ When you have mastered your first PDRI cycle, you will want to innovate and to become even more effective. We refer to these jumps to another PDRI cycle as "breakthroughs."

❑ Breakthroughs are relative—a breakthrough for one person might be an incremental step for another.

❑ Good ways to stimulate breakthroughs are learning from others who demonstrate high skills, rehearsing, and joining or creating a support group.

❑ One of the reasons recognition still hasn't attained the usage that it should is that the recognizers don't get recognized themselves.

❑ Don't forget to reward yourself!

CHAPTER 6 CHECKLIST
Getting Started with Individual Recognition

Getting Started . . . JUST DO IT:

- ❑ Start in your immediate sphere of influence.
- ❑ Do *one* thing differently.
- ❑ Ask employees what motivates them.
- ❑ Focus on what you can do, not what you can't do.
- ❑ Don't expect to do recognition perfectly.

Before You Recognize . . . ASK YOURSELF:

- ❑ What do I want to recognize?
- ❑ Who do I want to recognize?
- ❑ When should the recognition be done?
- ❑ Where should the recognition be done?
- ❑ How should the recognition be done?
- ❑ What could go wrong (and how can I prevent it)?
- ❑ What kind of response can I expect?

During the Recognition . . . ASK YOURSELF:

- ❑ How am I doing?
- ❑ Am I getting the response I expected?

After the Recognition . . . ASK YOURSELF:

- ❑ How am I doing?

- ❑ Am I doing what I planned to do?
- ❑ Is the timing right?
- ❑ Am I getting the response I expected?

Remember ASAP[3]:

- ❑ As Soon
- ❑ As Sincere
- ❑ As Specific
- ❑ As Personal
- ❑ As Positive
- ❑ As Proactive

Make Recognition Easy:

- ❑ Write notes.
- ❑ Be observant.
- ❑ Link the activity to your day planner.
- ❑ Harness the power of technology.
- ❑ Hold "one-on-one" meetings.
- ❑ Schedule time for recognition.

Use the Power of I's to Motivate:

- ❑ Interesting and important work
- ❑ Information/communication/feedback
- ❑ Involvement/ownership in decisions
- ❑ Independence/autonomy/flexibility

CHAPTER 7 CHECKLIST
Getting Started with Team Recognition

❑ Team recognition is really just a variation on individual recognition.

❑ The team recognition challenge: Recognize the team without slighting the individual.

❑ ASAP[3] applies to team recognition as well:

  ❑ As Soon   ❑ As Sincere

  ❑ As Specific   ❑ As Personal

  ❑ As Positive   ❑ As Proactive

❑ Try these ten ways to recognize teams:

1. Have managers pop in at the first meeting of a special-project team and express their appreciation of the members' involvement.

2. Open the floor for team members to praise anyone at the beginning or end of a meeting.

3. Have team members thank individuals for their contribution.

4. Create symbols of a team's work, such as logoed T-shirts or coffee cups.

5. Hold a "praise barrage" for team members to acknowledge one person on the team.

6. Use one member of the team to create an award for another member of the team.

7. Rotate responsibility for group recognition.

8. Host a refreshment hour, a potluck, or a special breakfast or lunch to celebrate interim or final results.

9. Have a manager ask an upper manager to attend a "bragging session."

10. Write thank-you letters to every team member at the end of a project.

❑ What do I want to recognize?

❑ Who do I want to recognize?

❑ When should the recognition for done?

❑ Where should the recognition be done?

❑ How should the recognition be done?

❑ What could go wrong (and how can I prevent it)?

❑ What kind of response can I expect?

❑ Some great team recognition principles:

❑ Focus on areas that will have the greatest impact.

❑ Involve your target employee group.

❑ Announce the recognition with fanfare.

❑ Publicly track progress.

❑ Have lots of winners.

❑ Allow flexibility of rewards.

❑ Renew the program as needed.

❑ Link informal and formal rewards.

❑ Find ways to perpetuate new behaviors.

❑ Recognize virtual teams.

❑ Use electronic technology to facilitate distance recognition.

❑ Take time for team-building activities.

❑ Don't let the virtual team members fall between the cracks.

CHAPTER 8 CHECKLIST
Getting Started with Organizational Recognition

❑ Organizational recognition is similar to and different from individual recognition.

❑ Organizational recognition requires a different perspective.

❑ Organizational recognition can have greater positive or negative impact.

Purposes of Organizational Recognition

❑ Performance improvement

❑ Modeling

❑ Showing appreciation

Starting Points for Organizational Recognition

❑ At the top

❑ In the middle

❑ At the bottom

What Works: The Five Essentials

❑ Aligned (vision, strategy, desired results, recognition program) plans

❑ Coordinated plans

❑ Well-designed plans

❑ Well-implemented plans

❑ Well-managed plans

The Skills of Organizational Recognition

❑ Organizational recognition requires the same skills as individual and team recognition *plus* systems thinking.

The Four Phases of Putting Organizational Recognition Programs into Practice

1. Design
2. Plan
3. Implement
4. Manage

Steps to Effectively Getting Started with Organizational Recognition

❑ Commit to doing it.

❑ Find an opportunity.

❑ Clarify the recognition goal and selection criteria.

❑ Ensure executive sponsorship.

❑ Maximize the recognition value.

❑ Consider the potential constraints.

❑ Develop the plan.

❑ Solicit feedback.

❑ Implement the program.

❑ Monitor the impact.

❑ Do it even better next time.

CHAPTER 9 CHECKLIST
Designing Successful Organizational Recognition

❑ The ultimate success of an organizational recognition program is very much dependent on the quality and clarity of the organizational programs themselves, and of the program design.

❑ The starting point of organizational recognition design is goal setting. A goal always reflects dissatisfaction with one or more aspects of the current state of the organization.

❑ The key to effective goal writing—creating goals that clearly communicate their intent—is specificity.

❑ The format of an effective goal is *action statement* (What will be achieved?), *target group* (Who will achieve it?), and *time frame* (When will it be achieved or for what period?).

❑ Once the organizational recognition goal is formulated, the organizational recognition program should be designed, guided by a set of design principles:

  ❑ Focus: Is there a clear focus to the recognition program?

  ❑ Clarity: Is the goal of the program clear?

  ❑ Readiness: Is the organization ready for the recognition program?

  ❑ Sponsorship: Is there executive sponsorship?

  ❑ Alignment: Is there alignment between the program and organizational priorities?

  ❑ Enhancement: Is the program built on the foundation of previous, successful recognition programs?

❑ Integration: Is the program integrated with other organizational initiatives?

❑ Systemization: Has the program been built into organizational systems?

❑ Responsibility: Is there clear responsibility for coordinating the program?

❑ Involvement: Are there opportunities for employee involvement?

❑ Accessibility: Is recognition accessible to a large number of employees?

❑ Visibility: Is the program visible?

❑ Knowledge sharing: Is there a provision for sharing knowledge about the program?

❑ Significance: Do employees feel that the program is significant?

❑ Presentation: How personal is the presentation of the recognition?

❑ Measurement: Are there adequate provisions for measuring the program, and for acting on feedback?

❑ Modifiability: Can the program be easily modified?

❑ Closure: Can the program be reversed if necessary?

❑ Sustainability: Has the program been built to be sustainable?

CHAPTER 10 CHECKLIST
Planning Successful Organizational Recognition

❑ Planning is an investment of time made in the present to improve performance in the future. Every hour spent in effective planning can save many hours (and much frustration) during execution.

❑ Albert Einstein: "Everything should be as simple as possible—but no simpler!"

❑ There are six elements of an organizational recognition plan: action plan, schedule, resource requirements, budget, potential failure factors and preventive actions, and measurement strategy.

❑ The best way to prepare an action plan is to identify the major categories of activities, and then identify the activities under each category.

❑ While an action plan provides a basic outline of what needs to be done, it doesn't usually explain *when* the activities need to be done. This is the purpose of the schedule. The schedule provides another perspective on the program—especially in terms of dependencies.

❑ The resource requirements can be identified from the action plan and the schedule. And almost all resources are time-critical. They must be designed, ordered, or otherwise acquired *before* they are needed. Slippage in meeting these individual resource acquisition dates can cause the entire program to be delayed.

❑ A budget is an estimate of the amount of money needed to fund the various elements of the program. Without one, you won't get funding approval, and people won't think proactively or economically.

❑ The way to avoid ambushes is by closely examining the many "contextual" factors in your organization that can undermine or sabotage the best intentions—and then plan how to avoid them, or deal with them if you can't. One of the best ways to mitigate potential failure factors—particularly with a high-risk initiative—is to implement a pilot project.

❑ Although measurement is the only way that progress can be monitored, it is too often overlooked. In addition, measurement provides crucial feedback about what to improve.

❑ Bottom line: With organizational recognition, as in so many other areas of life, "Those who fail to plan . . . plan to fail."

CHAPTER 11 CHECKLIST
Implementing Organizational Recognition

❑ View organizational recognition as organizational change.

❑ You will need to overcome inertia (resistance to change) and entropy (the tendency of enthusiasm for new programs to diminish over time).

❑ The keys to overcoming inertia and entropy are alignment, coordination, and communication.

❑ Make sure that your organizational recognition is aligned with your organization's vision, strategy, and values.

    ❑ Coordination of organizational recognition is essential to realizing its full benefits.

    ❑ Uncoordinated recognition will result in conflict, confusion, and duplication of resources.

❑ Alignment and coordination will increase synergy, and ensure that the impact of your organizational recognition is more than the sum of its individual parts.

❑ Nothing facilitates alignment and coordination of recognition like a recognition mission statement that clearly articulates your organization's values relative to recognition.

❑ Clarify expectations by providing recognition guidelines and standards.

❑ Any organization that is serious about organizational recognition should have a recognition coordinator.

❑ Communication is essential to the effective implementation of organizational recognition.

❑ Communicate the benefits of recognition.

❑ Share successes.

❑ Nothing communicates more powerfully than organizational managers who lead recognition.

❑ There are three phases of communication:

    1. Prelaunch

    2. Launch

    3. Ongoing

❑ Don't economize on communication.

CHAPTER 12 CHECKLIST
Managing Organizational Recognition

❑ Organizational recognition has a life cycle.

❑ It is important to manage the program throughout the life cycle.

   ❑ Stage 1: Preparation (prepare for the program).

   ❑ Stage 2: Announcement (announce the program).

   ❑ Stage 3: Promotion (promote the program).

   ❑ Stage 4: Excitement (build excitement for the program).

   ❑ Stage 5: Steady state (keep managing the program).

   ❑ Stage 6: Decline (don't let entropy take over).

   ❑ Stage 7: Revitalization (most recognition programs need to be revitalized).

   ❑ Alternative stage 7: Termination (sometimes it is best to terminate the program before it declines due to entropy).

❑ Being aware of the life cycle of organizational recognition can help you anticipate and make the most of each stage.

❑ The key to promoting organizational recognition is effective communication.

❑ The keys for managing the steady state of organizational recognition are:

   ❑ Ongoing communication

   ❑ Recognizing the recognizers

   ❑ Fine-tuning the program

❑ Ideas for revitalizing recognition:

   ❑ Add variety

   ❑ Establish new recognition opportunities

   ❑ Establish new recognition levels

   ❑ Enhance the scorekeeping process

❑ Ideas for positively terminating organizational recognition programs:

   ❑ Collect lessons learned: Those who don't learn from the past are destined to repeat it!

   ❑ Document positive testimonials: Don't dwell on the negatives!

❑ Don't forget to use valuable management tools for managing organizational recognition programs (for example, action plans, exception reports, and review meetings).

CHAPTER 13 CHECKLIST
Selling Recognition to Senior Management

❑ Consider the values of senior managers.

❑ Talk to them in their own terms.

❑ Enhance credibility.

❑ Share studies and statistics.

❑ Share industry "best practices."

❑ Make a personal appeal.

❑ Create a pilot program.

❑ Leverage and communicate successes.

❑ Nothing succeeds like success!

❑ Help senior management look good.

❑ Let senior managers choose their level of involvement.

❑ Recognize senior managers for recognizing others.

❑ Get senior managers to model recognition.

❑ Give employees access to the top.

❑ Small actions by senior managers yield big results.

❑ Help senior managers create a personal recognition plan.

CHAPTER 14 CHECKLIST
Troubleshooting Recognition Problems

❑ Despite the best intentions, recognition can go wrong.

❑ It is important to be aware of individual, team, and organizational recognition problems so that they can be avoided and/or fixed.

❑ Common individual recognition mistakes:

  ❑ Missed recognition opportunities

  ❑ Recognition that's not timely

  ❑ Insincere or mechanical recognition

  ❑ Misdirecting public recognition to individuals

  ❑ Undercutting praise with criticism

  ❑ Giving recognition that is not rewarding

❑ Common team recognition mistakes:

  ❑ Treating everyone the same

  ❑ Leaving someone out

  ❑ Not letting the group determine rewards

❑ Common organizational recognition mistakes:

  ❑ Rushing to recognition

  ❑ Rewards that aren't rewarding

  ❑ Making one size fit all

  ❑ Loss of freshness and relevance

  ❑ Confusing priorities and alignment

  ❑ Subjective recognition

  ❑ Entitlement recognition

  ❑ Recognition take-aways

  ❑ Inappropriate recognition

  ❑ Zero-sum recognition

  ❑ Untimely recognition

  ❑ Rewarding the wrong things

  ❑ Built-in demotivators

CHAPTER 15 CHECKLIST
Sustaining and Reenergizing Recognition

❑ There are many obstacles to getting a program up and running properly in the first place, but once the honeymoon's over, even the most popular and successful program faces the daunting challenge of keeping the excitement going.

❑ To sustain a recognition program over time, a number of things have to happen: new skills and tools have to be put in place, there has to be an ongoing focus on recognizing employees, and the motivation to recognize others in the organization has to be reenergized as needed along the way.

❑ To sustain your recognition programs, try the following:

   ❑ Link to strategic objectives.

   ❑ Gain renewed sponsorship commitment.

   ❑ Encourage specific management follow-up.

   ❑ Increase communication.

   ❑ Tie recognition to human resources systems.

❑ Reenergize recognition by:

   ❑ Increasing management involvement

   ❑ Providing new and improved recognition

   ❑ Holding recognition events

   ❑ Marketing your success

❑ Don't be afraid to terminate a program when it has outlasted its usefulness and cannot be easily reenergized.

❑ When the program is ready for termination, bring it to a close gracefully.