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Field Guide to Effective Leadership Engagements



Importance of Leadership Engagements

Effective leadership engagements communicate the values of the organization and help to establish a strong safety culture. To have an effective engagement, a leader must communicate clearly and demonstrate active listening skills. This guide supports leaders by providing suggestions for what to do before, during, and after a field leadership engagement.

Terminology

**Leader:**

A highly influential individual who is not involved onsite for day-to-day operations.

**Leadership Engagement:**

A conversation between a leader and front-line worker or small group of workers. The engagement encompasses all aspects of the project with a focus on employee safety.

**Life-Threatening Hazards**

A life-threatening hazard is one that is so dangerous that the most likely outcome from contact is a serious injury or fatality. These are also referred to as high-energy hazards. Examples include pressurized vessels, moving parts of energized equipment, and suspended loads.

**Direct Control:**

A targeted intervention that provides a sufficient safeguard against a high-energy hazard like fall protection, lock-out tag-out, and machine guarding.

Before the Engagement

Prior to the engagement, have a basic understanding of the project, type of work, critical hazards, schedule, and project constraints or frustrations.

Know the Work

Have an awareness of the tasks being performed by the workers you will engage with. This does not require in-depth technical knowledge, simply an understanding of how the specific tasks contribute to the successful completion of the project.

Know the History

Learn what frustrations the crew may have faced that day or week and if there has been some resolution.

Know the Audience

Have some background about the workers to make a genuine connection and recognize that you are a visitor in their day-to-day world.



During the Engagement

When performing an engagement, there are a series of practices that convey that you are sincere and that the engagement is your top priority. The Leadership Engagement Scorecard corresponds to this section and can be used to measure effectiveness.

Be Genuine & Understanding

To build relationships and establish trust, be mindful of the signals that you send during your visit.

1. Be Prepared to be on the Jobsite

Wear the appropriate jobsite attire and follow site rules to emphasize comradery. For example, consider how wearing an expensive suit and new shiny boots would be perceived compared to standard coveralls and worn work boots.

2. Pay Attention

Be physically and mentally present and put your phone or other distractions away during the engagement. For example, consider how a worker would feel if you are checking your phone or watch while they are sharing their ideas.



3. Remember this is **NOT** a Compliance Audit

The purpose of the engagement is to seek information about the work, how it is performed safely, how it can be improved, and how the company can be more supportive. It is important to verbally communicate that you are not there to audit; rather, your goal is to listen and learn. Workers often know that leaders are not experts in the craft, so it is important to use the engagement as an opportunity for personal growth. For example, consider how an operator would feel if they are describing a potential new tool that eliminates human contact with a hazard, but you question them about equipment inspections.



4. Understand Employee & Project Challenges

Ask about specific project challenges and how they affect the employees. Showing interest and empathy creates genuine connection. For example, if you learn that the crew has been working overtime and missing important family events, explain what their sacrifice means to you as a leader

Develop Connections & Demonstrate Care

Seek to make a personal connection and show interest in the lives of the workers.

1. Use Employee Names

Using names naturally in the conversation helps to establish connection and demonstrates that you recognize them as a person. For example, you could ask things like, how long have you been running an excavator, Sam?

2. Be Personal

Learn something personal about the workers before speaking about the project and allow them to talk about themselves as much as possible. This may involve asking questions about their interests, experiences, hobbies, or family. The leader should actively listen, ask follow-up questions, and not rush the conversation to establish a meaningful and lasting connection. For example, you might pick up on some signals and use the information to start a conversation like, I notice you have a Yankees sticker on your lunchbox, are you a baseball fan?

3. Learn About Their Motivation & Passion

Workers are proud of their craft. Learn how the employee entered this occupation, what they enjoy about their work, and if they have a family history in the industry. For example, you could say something like, you really have to know what you're doing in this line of work; are you a first-generation electrician?

Show Humility & Recognize Contributions

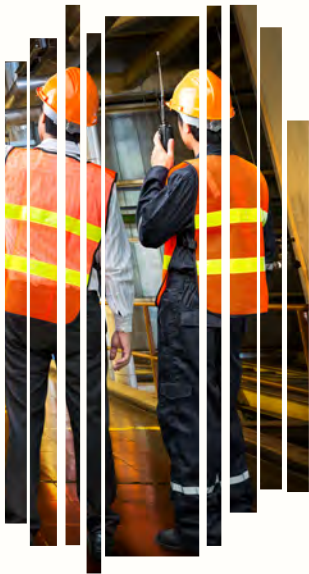
Show humility as a leader by recognizing that you are not a technical expert. Ask questions, actively listen, and show appreciation.

1. Ask Questions

Do not assume that you know how a task is completed. Acknowledge your lack of expertise and demonstrate an interest in learning about their craft. Give the workers the opportunity to showcase their knowledge, ask follow-up questions, and give them time to explain without rushing to the next question. Make sure to use a tone that expresses your interest in learning and growing without making them nervous.

2. Communicate Employee's Importance

Projects cannot be completed from a corporate office. Recognize workers bring their unique skills, contributions, loyalty, and ingenuity as vital to the company's success.



Demonstrate Safety is the Top Priority

A leader must recognize and communicate that the safety and well-being of employees is more important than production.

1. Communicate Production Pressures

Constantly communicate that safety is the top priority. If present, recognize and discuss schedule pressures or any other challenge that may compromise safety and remind them that their well-being is most important. Remind them of their Stop Work Authority and ask how they have used it in the past.

2. Ask About Resources

Ask workers how their task, process, or environment can be improved. When engaging with less-experienced employees, encourage them to share their ideas as well. For example, ask if a better tool exists or if any other resource can make work safer. Whenever possible, share an example of a suggestion that you or someone else in leadership received from the field and how it was implemented.



Focus on Life-Threatening Hazards & Direct Controls

The stuff that will hurt you is not always the same as the stuff that will kill you. For example, a slip, trip, fall is not the same as contact with an energized line or being crushed by heavy machinery. Recognize that preventing serious injuries and fatalities is most important.

1. Learn About the Life-Threatening Hazards

Ask questions like, *"What could kill me while I'm here today?"* or *"What could happen here today that you or your coworker couldn't walk away from?"* You can use this opportunity to acknowledge and appreciate the danger of their work and reinforce the need for them to be vigilant.

2. Learn About the Direct Controls



When life threatening hazards are identified, ask workers what they have in place to protect themselves. You can ask them to show you the safeguards in place for all life-threatening hazards and ask how each provides sufficient protection. Ask the workers for feedback on how direct controls can be improved. NOTE: If a Direct Control is not in place, immediately exercise your stop work authority to lead by example.

Recognize, Appreciate, & Respond to Feedback

A quality leadership engagement can only occur when everyone feels understood, valued, and appreciated.

1. Listen to the Employee

Create an environment where the employee can share their knowledge, concerns, challenges, and solutions. By maintaining eye contact and using welcoming body language, you can establish personal connection and make the workers feel valued.

2. Repeat What you Learned

Emphasize that the candid feedback from employees is the best way to improve. Paraphrase and repeat back your understanding of their feedback and provide action items where applicable. Don't rush the conversation. For example, you might say, James, your idea for a new work platform is excellent. I am going to bring this up at our next leadership meeting.



After The Engagement

Field engagements should end on a positive, inspirational note. The employees should walk away from the engagement knowing they are valued, and their input will make a difference.

1. Recognize

Always respect worker's privacy and confidentiality. If an employee's input is beneficial to the organization, recognize their contribution. However, remember that public recognition may inspire some and deter others, so be tactful.

2. Record

Identify and record any action items that you communicated during the engagement and keep any promises that you made.

3. Track

Use a tracking system to ensure action items are communicated and completed.

Bottom Line

A quality leadership engagement can foster innovation and establish a strong safety culture. Conversely, poor leadership engagements can be discouraging, cause apathy, and drive down performance. This guide was designed to describe to leaders what an excellent engagement looks like and serve as a tool for continuous improvement and personal growth.

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*Denotes team leaders

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