Cover Page of Abstract and Case Study

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CERTIFICATE OF ORIGINALITY

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Title of the Case: Revitalizing Employee Engagement: A Manager’s Journey

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Abstract: Case Study - Revitalizing Employee Engagement: A Manager's Journey

This case study follows Mr. Rajesh Patel, newly appointed branch head of Bank of Baroda's Surat branch, as he grapples with employee disengagement, poor operational performance, and faltering customer service. Upon reviewing the branch's performance metrics, Rajesh discovers a range of issues, including compliance failures, delays in processes, and a lack of role-specific training despite the availability of a robust training structure. Employee motivation and engagement are clearly low, and Rajesh is tasked with addressing these core issues to turn the branch around.

In response, Rajesh explores various strategies, such as team-building activities, peer recognition programs, and process simplification, but quickly realizes that short-term morale boosters alone won't resolve deeper problems. Guided by insights from a senior colleague, Rajesh adopts a multi-faceted approach that includes clearer communication, role-specific training, peer-to-peer learning sessions, group quizzes, and both non-financial recognition and professional certifications.

As Rajesh refines his strategy, he encounters both successes and challenges. While employee engagement and performance improve through tailored learning and collaborative efforts, issues related to workload, burnout, and the need for continuous adaptation remain. This case study provides a practical exploration of employee engagement, focusing on how role-relevant training, continuous feedback, and recognition contribute to a sustainable culture of learning and development.

The case encourages participants to analyze various engagement strategies, evaluate their effectiveness, and apply theoretical frameworks like Kahn's Theory of Engagement and the Job Demands-Resources (JD-R) Model to real-world organizational challenges. Through this analysis, participants are guided to develop actionable solutions for long-term employee engagement, growth, and performance improvement.

Case Study: Revitalizing Employee Engagement: A Manager's Journey

After spending nearly three years as a Senior Manager in the Learning and Development department at the Training Academy in Mumbai, Mr. Rajesh Patel after his promotion to Chief Manager received his new assignment as the branch head of Bank of Baroda's large regional branch in Surat. While Rajesh was initially excited about the opportunity, he soon realized the task at hand would be much harder than expected.

Rajesh joined the Surat branch on 1st February 2023, replacing Mrs. Shalini Mehta, who was transferred to a new position in another region. Before her departure, Mrs. Mehta introduced Rajesh to the branch's key clients and walked him through the branch's key performance indicators. While the client relationships seemed stable, Rajesh grew increasingly concerned as he reviewed the branch audit reports and employee performance metrics. These reports revealed a steady decline in employee engagement, faltering customer service, and declining productivity over the past year. The real issue, Rajesh realized, was rooted in employee disengagement and poor operational performance.

Understanding the Problem

In his first few weeks at the Surat branch, Rajesh conducted a thorough review of the branch's operations. The issues were glaring and clearly linked to employee disengagement and low motivation. The most concerning points were:

- Audit reports highlighted significant compliance issues, particularly delays in account opening, loan processing, and inaccurate reporting.
- Customer feedback revealed growing dissatisfaction due to long transaction times and miscommunication about product offerings, further damaging the branch's reputation.
- There were recurring queries from higher authorities about operational inefficiencies, missed performance targets, and ongoing compliance failures.
- Employees appeared disengaged and unmotivated, with high error rates and frequent mistakes, particularly in loan documentation and other routine processes.
- Despite the availability of the robust training infrastructure of the Bank as well as Learning Management System (LMS), which offered a wide array of courses designed to upskill

employees, Branch employees have not got their job-related training since long and there was little to no engagement of employees with the LMS platform.

Rajesh realized that the branch's increasing operational inefficiencies and customer dissatisfaction were directly linked to employee disengagement. However, the challenge lay in understanding how to effectively address these issues and re-engage his team.

Staff Feedback and Insights

To better understand the underlying causes of disengagement, Rajesh called a staff meeting and invited employees to share their thoughts on the current situation. During the meeting, several concerns were raised:

- Employees felt overwhelmed by their daily workload and didn't see the immediate solutions on how to reduce this work load. Employees also did not know from where to get resolutions of their queries whenever they are in confusion.
- Many felt that the no proper learning / handholding mechanism available in Bank. Learning courses which were available was not tailored to their specific roles and therefore had little relevance to their day-to-day responsibilities.
- There was a general sense of confusion about how to address the branch's declining performance, with employees unsure of where to start in terms of improving their knowledge and skills.

Rajesh also sought input from his senior staff, asking for suggestions on how to boost employee performance. A few ideas were proposed:

- Appreciation tied to achieving performance targets.
- Team-building activities and outings to boost morale.
- Revamping customer service procedures to improve communication and reduce errors.
- Providing additional training and support focused on service delivery and compliance.

Each suggestion had some merit, but Rajesh quickly realized there was no clear consensus on the best approach. The team appeared disconnected from the core issues affecting engagement, and short-term fixes like appreciations or social outings didn't seem likely to resolve the deeper problem. The lack of direction in employee performance and engagement was evident, and Rajesh understood that more meaningful interventions were required.

It became clear that to boost engagement and improve performance, Rajesh needed to take a multi-faceted approach. This would involve addressing not just the operational challenges but also focusing on tailored training, skill development, and fostering a sense of ownership and involvement in employees' learning journeys.

Exploring Possible Solutions

Rajesh knew that resolving the issues at the Surat branch required a comprehensive strategy to tackle the root causes of employee disengagement. He began brainstorming possible ways to boost engagement, considering multiple options:

1. **Clear Communication:**

   Rajesh realized that fostering open and transparent communication between management and employees could help address some of the underlying frustrations. He considered holding regular meetings where employees could voice their concerns, share feedback, and receive updates about the branch's goals. Rajesh believed that clear communication would help build trust and provide clarity around employees' roles and expectations.

2. **Team Building and Social Activities:**

   Organizing team-building events, such as off-site activities or monthly team lunches, could help improve employee morale and create a sense of camaraderie. However, Rajesh was cautious about relying too heavily on social activities as a long-term solution. He believed these activities might provide a temporary boost in engagement without addressing the operational issues that the branch was facing, such as errors in loan processing and compliance failures.

3. **Work-Life Balance:**

   Many employees had expressed feeling overworked, which was affecting their engagement. Rajesh considered introducing more flexible work arrangements or offering mental health days to help staff balance their workload with personal responsibilities. Ensuring that employees were not burning out would help sustain their energy and commitment to their roles.

4. **Process Simplification:**

   Rajesh identified that many operational issues, such as delays in account opening and loan processing, were due to inefficient processes knowledge or non-standard approach. He considered simplifying procedures by providing SOPs to reduce errors and improve efficiency. However, Rajesh understood that process improvements alone wouldn't be enough without the right training to ensure employees could adapt to the new systems.

5. **Learning and Development through the Learning Management System (LMS):**

   The branch had access to a Learning Management System (LMS), but it wasn't being used effectively. Rajesh believed that tailored training through the LMS could provide employees with the skills and confidence needed to perform better in their roles. By identifying essential courses focused on areas such as compliance and service delivery, Rajesh could align learning opportunities with the branch's specific needs.

6. **Recognition and Rewards:**

   Rajesh also knew the power of recognition in motivating employees. He considered introducing non-financial rewards—such as mementos, certificates, or even public recognition during team meetings—to acknowledge employees who performed well in training, customer service, or process improvements. Recognizing achievements could foster a sense of accomplishment and encourage others to strive for success.

7. **Employee Feedback and Involvement:**

   Gathering regular feedback from employees was essential to understand their needs and challenges. Rajesh considered setting up a suggestion box or holding feedback sessions where employees could share their thoughts on training, work processes, and overall engagement. By involving employees in decision-making, Rajesh hoped to create a sense of ownership and accountability for branch success.

At this point, Rajesh recognized that each option had potential benefits and drawbacks. While some strategies, such as incentives and team-building activities, might offer short-term solutions, others—such as learning and development, process simplification, and clear communication—had the potential to address the long-term issues at the branch.

Rajesh decided to blend these approaches to create a multi-faceted engagement strategy, ensuring that the branch's immediate needs—such as improving compliance, reducing customer complaints, and meeting profit targets—were met, while also fostering sustained employee engagement through continuous learning and development.

Initial Attempts and Mixed Results

Rajesh knew that addressing the branch's engagement issues would require action on multiple fronts, but he wasn't certain which solution would be most effective. He decided to start by focusing on team-building activities and recognition as a way to quickly boost morale.

Rajesh organized a monthly team lunch, hoping that socializing outside of the workplace would encourage collaboration and help alleviate some of the stress his employees were feeling. He also introduced a peer recognition program in which employees could nominate their colleagues for small rewards, like certificates or mementos, based on their contributions to customer service, teamwork, or process improvements.

At first, Rajesh noticed a slight increase in team camaraderie. Employees seemed more relaxed, and the atmosphere in the office improved slightly. However, the initial excitement quickly faded. Rajesh observed that while team-building activities helped temporarily lift spirits, they didn't address the core operational issues.

- Errors in loan processing continued, and compliance issues persisted.
- Customer complaints about miscommunication and long transaction times were still coming in.
- The suggestion box Rajesh had introduced didn't generate the feedback he had hoped for, as employees seemed hesitant to engage deeply with it.

It became clear that team-building alone wasn't enough to create lasting improvements in engagement or performance. While the social initiatives provided a temporary morale boost, they didn't address the root causes of disengagement, such as lack of role-specific skills and the absence of clear processes.

At this point, Rajesh faced a dilemma: Should he continue focusing on short-term morale boosters, or shift his focus toward more strategic, long-term solutions.

Seeking Advice from a Senior Colleague

Feeling uncertain about his next steps, Rajesh decided to seek advice from a trusted colleague. He reached out to Mr. Ramesh Desai, a senior branch head in Ahmedabad, who had faced similar challenges in the past. Rajesh explained the various approaches he had tried—team-building activities, peer recognition programs, and social events—and shared his concerns about the persistent operational issues and low employee engagement.

Ramesh listened carefully and then offered a few insights. “It sounds like you're on the right track by trying multiple approaches,” he said, “but maybe you need to go a little deeper. Social activities and rewards can lift spirits for a while, but people need to see a clear connection between their efforts and their day-to-day work. In my experience, employees tend to disengage when they feel their skills aren’t aligned with the branch’s goals or when processes seem unclear.”

Ramesh emphasized the importance of clear communication and role-specific learning opportunities. He suggested that Rajesh spend more time ensuring that employees understood how their roles contribute to the branch's overall success and focus on simplifying processes so that employees felt more confident in their daily tasks.

“Sometimes, you need to look beyond immediate morale boosters,” Ramesh added. “It’s about creating a sustainable environment where employees are empowered through a combination of training, streamlined processes, and recognition that truly feels meaningful.”

A New Approach: Balancing Multiple Strategies

Taking the advice from his senior colleague to heart, Rajesh decided to move beyond just team-building activities and rewards, and began implementing a more comprehensive strategy. He blended several approaches to address the root causes of disengagement while continuing to engage the team in collaborative efforts.

First, Rajesh decided to introduce clearer communication channels and streamline processes. He realized that a lack of clarity in procedures, especially in areas like loan processing and compliance, was contributing to errors and frustration among employees. To address this, Rajesh:

- Introduced a set of standard operating procedures (SOPs) for key tasks, which were designed to simplify processes and reduce errors available at Banks intranet.

- Held weekly meetings to discuss ongoing challenges and update employees on changes to branch goals. These sessions became a platform for employees to raise questions and share concerns about their daily responsibilities.

However, Rajesh also knew that process improvements would only work if employees had the skills to execute them effectively. As a result, he continued to push for role-specific training through the Learning Management System (LMS), ensuring that courses directly addressed the challenges faced by his staff. This time, however, he also emphasized collaborative learning, encouraging employees to work together in applying new skills.

Mixed Results and the Need for Adaptation

Initially, Rajesh's approach showed promise. The introduction of SOPs helped reduce errors in processes like loan documentation and account opening. Employees began to feel more confident in their tasks, and the weekly meetings fostered a sense of openness and trust within the team. However, not all aspects of the strategy were immediately successful:

- While some employees embraced the SOPs and used them to improve their performance, others were still struggling to adapt to the changes.
- Participation in the LMS courses continued to increase, but a segment of the team still viewed the training as burdensome, particularly those who felt that the courses didn't align closely enough with their roles.

Rajesh faced a dilemma: Should he continue to push for more structured training and process improvements, or should he focus more on motivating the team through recognition and peer-to-peer support?

Strengthening Peer Learning and Team-Based Activities

Rather than relying on one approach, Rajesh decided to strengthen the peer-learning culture in the branch. He introduced weekly peer-to-peer learning sessions where employees who had completed training courses would share their knowledge with the team and discuss how it could be applied to solve specific branch problems:

- For example, employees who completed compliance training shared how they applied their new knowledge to reduce audit report errors.

- The loan processing team discussed how they could implement credit assessment techniques they had learned in their training.

To further promote collaboration, Rajesh introduced group quizzes in the mornings or evenings. These quizzes were designed to be fun and engaging, covering topics from both the classroom training and LMS courses. He provided small non-financial rewards, such as chocolates and lunch coupons, to the top performers, which kept the environment light and boosted morale. The competitive element also encouraged employees to stay engaged with their learning.

Recognizing Success and Encouraging Further Growth

Rajesh also understood the importance of recognition in maintaining long-term motivation. He worked closely with the corporate office to ensure that employees who were excelling in their training were publicly acknowledged:

- Employees who completed certifications from IIBF or Coursera were recognized in branch meetings and congratulated through corporate-wide emails.
- Those who performed well in national-level quiz competitions or excelled in customer service were given small mementos during branch-wide celebrations.

This system of non-financial rewards gave employees a sense of pride and encouraged others to engage more deeply in the branch's learning culture.

Lessons Learned and Ongoing Dilemmas

Although Rajesh's blended strategy showed signs of success, he realized that there was no single solution that could solve all the branch's challenges. The process simplification and collaborative learning initiatives helped reduce errors and boost engagement in certain areas, but some employees still felt that they were not receiving enough role-specific support. Others continued to express concerns about workload and burnout, signaling that work-life balance might need to be addressed in future strategies.

Rajesh now faced another dilemma: Should he invest more heavily in work-life balance solutions like flexible work hours, or continue refining his current approach to training and recognition?

The journey to improving engagement and performance was ongoing, and Rajesh understood that he needed to continuously adapt his strategies to meet the evolving needs of his team. By remaining flexible and responsive to employee feedback, Rajesh aimed to create a culture where engagement, learning, and collaboration were at the core of the branch's success.

Final Outcome: Building a Culture of Learning and Engagement

Over the next several weeks, Rajesh's efforts began to pay off as his blended strategy showed clear results:

- Employees became more engaged as they saw the direct benefits of training tailored to their roles. Loan officers nominated for Credit Analyst training reduced errors in loan processing, while the customer service team improved response times after attending sessions on client communication.
- Participation in weekly quizzes increased, with top scorers recognized publicly during branch meetings. This recognition, along with the peer-to-peer learning sessions where employees shared their newly gained knowledge, created a sense of collaboration and ownership.
- Encouraged by Rajesh, several employees began pursuing certifications from IIBF on subjects like KYC/AML, Digital Banking, and MSME, enriching their profiles and preparing for future career growth. Some even expressed interest in pursuing international certifications such as FRM or CFA for personal development.

Rajesh also ensured that the Learning Management System (LMS) was continuously for employee development. By linking learning outcomes to operational improvements—like reducing turnaround times and improving audit compliance—Rajesh created a culture of continuous learning that not only solved the branch's immediate challenges but also set the foundation for long-term employee growth.

Ultimately, Rajesh had transformed the branch into a model of engagement and efficiency by blending classroom training, LMS courses, certifications, and non-financial rewards. His holistic approach fostered a thriving environment where employees were motivated, continuously learning, and actively contributing to the branch's success.

Discussion Questions

1. What were the key challenges Rajesh faced in improving employee engagement? How did these challenges evolve over time?
2. How effective were the combined strategies Rajesh used, including peer-to-peer learning, role-specific training, and recognition? Could he have taken a different approach?
3. What role did certifications (IIBF, Coursera) and quizzes play in motivating employees to engage with learning opportunities? How can these tools be used to foster long-term engagement?
4. How important is it to align training and development programs with employees' daily tasks and branch performance goals? Can learning be truly effective without this connection?
5. What are the advantages of offering non-financial rewards, like public recognition or mementos, compared to financial incentives? How does each type of reward impact long-term motivation?
6. What strategies could Rajesh use to continue encouraging employees to pursue further studies or certifications, such as FRM or CFA, and how might this impact both personal and branch-wide growth?
7. How can Rajesh ensure that the enthusiasm for learning and development remains sustainable over the long term, especially with new employees joining the branch?

Facilitation Note for the Case Study: Revitalizing Employee Engagement: A Manager's Journey

Problem Statement:

Rajesh faces employee disengagement at the Surat branch, resulting in declining operational efficiency, customer service issues, and compliance problems. The challenge is to identify and implement a strategy to re-engage employees and improve branch performance, while balancing short-term boosts with long-term, sustainable solutions.

Theoretical Framework:

1. **Kahn's Theory of Engagement:** This theory emphasizes three key psychological conditions required for employee engagement:
    - Meaningfulness: Employees must find personal value in their work, which means that the training and development must be relevant to their roles and branch goals.
    - Psychological Safety: Rajesh must ensure that employees feel safe in the workplace, meaning there is clarity in processes, open communication, and support for learning from mistakes without fear of repercussions.
    - Availability: Employees need to feel physically and emotionally available to perform their roles, which ties into work-life balance and workload management.
2. **Job Demands-Resources (JD-R) Model:** According to this model, employees are engaged when they can balance the demands of their job (workload, complexity) with the resources available (support, training). Rajesh's strategy must ensure that the resources—such as LMS training, SOPs, and supportive feedback—are sufficient to manage the demands of high workloads and performance targets.

Case Analysis:

- **Initial Approaches and Setbacks:** Rajesh began by trying social activities and peer recognition to create a morale boost. While these activities provided short-term engagement, they didn't address the core challenges of poor operational performance and skill gaps. This reflects Kahn's theory where psychological safety was present, but meaningfulness and availability were not fully met, as employees didn't see how their work related to the branch's larger success.

- **Process Simplification and Training:** The SOPs provided employees with clear guidelines, helping to reduce errors and build confidence in daily tasks. Combined with the LMS, these tools served as resources in the JD-R model. However, role-specific training needs more tailoring to ensure employees see the direct relevance of their learning. Rajesh's failure to address meaningfulness earlier contributed to the partial success of this approach.

- **Peer Learning and Team Collaboration:** Peer-to-peer sessions and group quizzes helped employees collaborate, sharing practical insights from training. These activities contribute to both psychological safety and availability in Kahn's theory, where employees begin to feel a sense of ownership in the learning process.

- **Certification and Recognition:** Encouraging employees to pursue IIBF certifications or even FRM/CFA showed Rajesh's commitment to long-term career development. This directly addressed the meaningfulness aspect by helping employees align their career goals with the branch's success. Public recognition, in turn, fostered a sense of achievement, motivating others.

Optimal Solution:

The optimal solution for Rajesh's case is a multi-faceted strategy that combines:

1. Role-specific training through the LMS with courses that are directly tied to resolving branch challenges.

2. Clear communication and process simplification, ensuring employees feel confident in their daily tasks.

3. Peer collaboration, where employees work together on weekly learning sessions, and team-based quizzes to foster camaraderie and shared learning.

4. Recognition systems that celebrate both individual achievements (such as certifications) and team successes (improved customer service or reduced errors).

5. Addressing work-life balance concerns to ensure availability and prevent burnout.

This strategy balances the psychological conditions for engagement with a resource-based approach from the JD-R model, ensuring both short-term morale boosts and long-term sustainable improvements.

Discussion Questions with Potential Solutions:

1. What were the key challenges Rajesh faced in improving employee engagement? How did these challenges evolve over time?

Solution:
Rajesh initially faced low employee engagement, leading to operational inefficiencies, errors in compliance, and poor customer service. These issues were compounded by employees feeling disconnected from their roles, lacking relevant training, and being overwhelmed by their workload. Over time, these challenges evolved as Rajesh attempted different strategies. He found that while short-term morale boosters like team lunches helped temporarily, they did not address the root causes of disengagement, such as the lack of clarity in processes and role-specific skills.

2. How effective were the combined strategies Rajesh used, including peer-to-peer learning, role-specific training, and recognition? Could he have taken a different approach?

Solution:
The combined strategies had mixed success. Peer-to-peer learning and role-specific training began addressing the skills gap, helping employees see how their learning could be applied to their daily tasks. Recognition motivated employees, but the initial use of social activities and rewards wasn't enough to solve deeper operational problems. Rajesh could have started by focusing on process simplification and tailored training from the beginning, which would have been more directly tied to solving branch issues.

3. What role did certifications (IIBF, Coursera) and quizzes play in motivating employees to engage with learning opportunities? How can these tools be used to foster long-term engagement?

Solution:
Certifications and quizzes provided a sense of personal achievement and offered employees clear,

tangible outcomes from their learning efforts. They also encouraged continuous learning and helped employees develop skills relevant to both their current roles and future career growth. To foster long-term engagement, Rajesh could establish a systematic rewards structure for employees who pursue advanced certifications like FRM or CFA, linking these accomplishments to career progression within the branch or the bank.

4. How important is it to align training and development programs with employees' daily tasks and branch performance goals? Can learning be truly effective without this connection?

Solution:

It is crucial to align training with employees' daily tasks and branch goals to ensure that learning has a direct impact on performance. Without this connection, employees may see training as irrelevant or burdensome. For training to be effective, it must address specific challenges they encounter in their roles, like improving customer service or reducing errors in loan documentation. By tailoring learning content to operational goals, employees are more likely to see the value in their training and apply their new knowledge.

5. What are the advantages of offering non-financial rewards, like public recognition or mementos, compared to financial incentives? How does each type of reward impact long-term motivation?

Solution:

Non-financial rewards like public recognition or mementos foster a sense of personal accomplishment and belonging, which can contribute to long-term intrinsic motivation. Financial incentives may lead to short-term performance boosts but can sometimes encourage employees to focus solely on meeting targets for the reward. A combination of both types of rewards, with public recognition for consistent effort and financial rewards for exceptional performance, can maintain a balance between intrinsic and extrinsic motivation.

6. What strategies could Rajesh use to continue encouraging employees to pursue further studies or certifications, such as FRM or CFA, and how might this impact both personal and branch-wide growth?

Solution:

Rajesh could create a mentorship program where employees who have completed certifications guide others interested in pursuing advanced qualifications. He could also link certification achievements to career development opportunities or internal promotions. Encouraging further studies not only enhances the employees' skill sets but also builds a knowledgeable workforce that can handle more complex tasks, ultimately improving the branch's overall performance and reputation.

7. How can Rajesh ensure that the enthusiasm for learning and development remains sustainable over the long term, especially with new employees joining the branch?

Solution:
To sustain enthusiasm, Rajesh could implement a learning culture by integrating continuous development into the branch's daily routine. For new employees, an onboarding program that includes a mix of LMS courses, peer mentoring, and regular feedback could ensure they are quickly brought up to speed. Rajesh could also continue organizing team-based learning activities, peer-to-peer sessions, and recognition programs to maintain engagement. Regularly updating the LMS with relevant courses and celebrating small wins can also help keep the momentum going.