

HR17 · STEP 3 · INTERIM

Engagement Survey Insights & Actions

Engagement Improvement Plan

Prioritized action plan linking each validated engagement signal to owner type, time horizon, measurable success marker, and exclusions.

ABOUT THIS DOCUMENT

This is a **sample** deliverable from the **Engagement Survey Insights & Actions** workflow (HR17) in AGASI AiOS. It shows the expected structure and tone. All names, numbers, and facts are **fictional**.

Engagement Improvement Plan - Northbridge Advisory Partners

Compiled by: HR Analyst, People & Culture - Northbridge Advisory Partners Approved by: HR Director, People & Culture Date: Current planning cycle Scope: Prioritised actions derived from the current engagement survey, HR11 Exit Theme Summary, and sector benchmark analysis Related documents: Engagement Risk Flags (HR17 output), Exit Theme Summary (HR11 output)

Plan Summary

This improvement plan addresses the seven engagement risk signals validated through cross-referencing current survey data, exit interview themes (HR11), and sector benchmarks. Actions are prioritised by combined evidence weight and feasibility. Each action links to a specific validated signal and includes a measurable success criterion.

- **Total actions:** 14
- **Critical priority:** 4
- **High priority:** 6
- **Medium priority:** 4
- **Estimated timeline:** Immediate to 6 months

Recommended Actions

#	Signal Addressed	Action	Owner	Priority	Timeframe	Expected Impact
1	Compensation gap - Data & AI Advisory (Risk Flag #1)	Conduct targeted compensation benchmarking for Data & AI Advisory, covering Senior Consultant through Senior Manager bands. Compare to current benchmark gap of 14%.	Compensation Analyst, Total Rewards	Critical	Immediate (within two weeks of approval)	Identifies the scale of adjustment needed to close the gap toward the 5% target
2	Compensation gap - Data & AI Advisory (Risk Flag #1)	Present compensation adjustment recommendations to the HR Director, including cost modelling for 5%, 8%, and 12% adjustment scenarios across affected bands.	Compensation Analyst, Total Rewards	Critical	Immediate (within three weeks of approval)	Provides decision-ready options for the HR Director to act on before further attrition
3	Career progression framework (Risk Flag #2)	Draft a career progression framework for Data & AI Advisory and HR Systems. Include published criteria, promotion timelines, and internal mobility pathways.	L&D Manager, People Development	Critical	Short-term (within the standard project window)	Addresses the strongest engagement predictor (Career Development beta 0.31) for the two lowest-scoring teams
4	Career progression framework (Risk Flag #2)	Circulate the draft framework to Practice Heads and the HR Director for review. Incorporate feedback and publish firm-wide within 60 days.	L&D Manager, People Development	High	Short-term (follow-on to action 3)	Gives affected employees visibility into progression criteria, directly addressing exit theme #2
5	HR Systems resourcing (Risk Flag #3)	Approve backfill for the departing HRIS Analyst role. Post the requisition before the current analyst's last working day.	HRIS Administrator, HR Systems	Critical	Immediate (within 10 business days of approval)	Prevents the team from dropping below critical capacity during the HRIS migration
6	HR Systems resourcing (Risk Flag #3)	Assess whether a third analyst is needed to clear the dual-platform migration backlog and the ~40 legacy grade-mapping records. Present the business case to the HR Director.	HRIS Administrator, HR Systems	High	Short-term (within three weeks of approval)	Addresses the root cause of the 44% Workload & Resources score and HRIS data quality issues (exit theme #7)
7	Post-acquisition cultural fragmentation (Risk Flag #4)	Establish a cross-practice integration working group with representation from at least 3 practices (Data & AI Advisory, Risk & Compliance Advisory, and one other).	HR Director, People & Culture	High	Short-term (within the standard project window)	Begins the structured integration effort the benchmark report identifies as requiring 18-30 months for recovery

#	Signal Addressed	Action	Owner	Priority	Timeframe	Expected Impact
8	Post-acquisition cultural fragmentation (Risk Flag #4)	Prioritise resolution of process and system inconsistencies between legacy Northbridge and Meridian teams. Start with grade mapping, reporting lines, and project delivery methodology alignment.	HRIS Administrator, HR Systems + Practice Heads	High	Medium-term (next programme checkpoint)	Reduces the "fragmented" experience cited by two of three exit interviewees and survey free-text comments
9	Management effectiveness - Risk & Compliance (Risk Flag #5)	Raise management availability feedback with the Practice Head, Risk & Compliance Advisory through the HR Director. Recommend a minimum fortnightly check-in cadence for all team members, with weekly cadence for employees in their first 6 months.	HR Director, People & Culture	High	Immediate (within two weeks of approval)	Directly addresses the 58% Management Effectiveness score (14 pts below firm average) and exit theme #8
10	Management effectiveness - Risk & Compliance (Risk Flag #5)	Provide the Practice Head with a management effectiveness toolkit: structured one-on-one agenda template, delegation guidance, and quarterly development conversation prompts.	L&D Manager, People Development	Medium	Short-term (within one month of approval)	Supports improved management practice without requiring formal training intervention
11	Onboarding quality (Risk Flag #6)	Audit all practices against the standard onboarding checklist. Investigate why Risk & Compliance Advisory did not use the standard process during the managed-services ramp-up. Report gaps to the HR Director.	Employee Relations Specialist, People Operations	High	Immediate (within 10 business days of approval)	Identifies which practices are non-compliant and enables targeted intervention to close the gap toward 92% completion target
12	Onboarding quality (Risk Flag #6)	Mandate buddy/mentor assignment for all new hires in their first 90 days. Align with the sector benchmark coverage of 67% as an interim target.	Employee Relations Specialist, People Operations	Medium	Short-term (before the next major onboarding review)	Addresses the "no buddy, no 30-60-90 plan" feedback from exit theme #4 and sector best practice
13	Digital & Technology data gap (Risk Flag #7)	Re-survey the Digital & Technology practice after the restructure completes. Target a minimum 70% response rate.	People & Culture team	Medium	Medium-term (next survey wave)	Provides reliable data to assess whether intervention is needed for this team
14	Communication quality vs perception gap	Investigate the divergence between the high Communication score (75%, above benchmark) and free-text comments flagging poor operational communication. Run a targeted pulse check on operational communication quality.	People & Culture team	Medium	Medium-term (next planning checkpoint)	Clarifies whether the Communication score masks an operational gap or reflects genuine strength

Implementation Notes

Action 1-2: Compensation Benchmarking (Critical)

- **Rationale:** Compensation & Benefits is the third-strongest engagement predictor (beta 0.19), and Data & AI Advisory's score of 49% is 19 points below the sector benchmark median of 68%. The HR11 exit confirms a 22% market gap for at least one departing Senior Consultant. With the firm-wide benchmark gap at 14% (target 5%), Data & AI Advisory likely has the widest gap and the highest attrition risk.
- **Success Measure:** Compensation adjustment recommendations presented to the HR Director with cost scenarios by the follow-on deadline. Compensation & Benefits dimension score for Data & AI Advisory improves by at least 5 points in the next survey cycle.
- **Dependencies:** Access to current market data for technology advisory roles at the Senior Consultant and Senior Manager level. Compensation Analyst availability.

Action 3-4: Career Progression Framework (Critical)

- **Rationale:** Career Development is the single strongest predictor of engagement in the benchmark regression (beta 0.31). The firm-wide score of 55% is 10 points below the sector median of 65% and dropped 6 points year-on-year - the largest decline of any dimension. Three teams are in the weak band: HR Systems (42%), Risk & Compliance Advisory (48%), Data & AI Advisory (51%). Two of three HR11 exit interviews cited unclear career progression as a key factor.
- **Success Measure:** Published career progression framework covering at least Data & AI Advisory and HR Systems by the agreed publication date. Career Development dimension score improves by at least 4 points in the next survey cycle.
- **Dependencies:** L&D Manager capacity. Practice Head input on role-specific progression criteria. HR Director sign-off on promotion criteria before publication.

Action 5-6: HR Systems Resourcing (Critical)

- **Rationale:** The HR Systems team scored 44% on Workload & Resources (20 points below firm average) and is losing an analyst on the current offboarding schedule. The team is simultaneously managing a dual-platform HRIS migration, ~40 legacy grade-mapping records, and ongoing operational support. Without immediate backfill, the team cannot maintain current operations, let alone clear the migration backlog.
- **Success Measure:** Backfill requisition posted by the 10-day checkpoint. Business case for third analyst presented by the three-week checkpoint. Workload & Resources score for HR Systems improves by at least 10 points in the next survey cycle.
- **Dependencies:** Budget approval from the HR Director. Availability of qualified HRIS analysts in the market (note: sector time-to-fill for shared services roles is approximately 44 days at median).

Action 7-8: Cultural Integration (High)

- **Rationale:** Post-acquisition cultural fragmentation was cited in two of three exit interviews and appears in survey Culture & Belonging scores (Risk & Compliance 56%, Data & AI 65%). The benchmark report indicates post-M&A firms typically experience a 4-7 point depression with recovery requiring 18-30 months of active effort. The Meridian acquisition completed in the prior half-year; active integration has not yet been formally structured.
- **Success Measure:** Cross-practice working group established by the short-term deadline with a published terms of reference. Culture & Belonging score improves by at least 3 points in the next survey cycle.
- **Dependencies:** Practice Head participation. HR Director sponsorship. Coordination with HRIS migration timeline.

Action 9-10: Management Effectiveness (High)

- **Rationale:** Risk & Compliance Advisory's Management Effectiveness score of 58% is the lowest of any team on this dimension and 16 points below the sector benchmark of 74%. The HR11 exit records a departing Associate Consultant citing absent management and no check-in cadence. Management Effectiveness is the second-strongest engagement predictor (beta 0.26), particularly for employees with tenure under 2 years.
- **Success Measure:** Fortnightly check-in cadence adopted by the Practice Head within 4 weeks. Management Effectiveness score for Risk & Compliance Advisory improves by at least 8 points in the next survey cycle.
- **Dependencies:** HR Director willingness to raise the feedback. Practice Head receptiveness.

Action 11-12: Onboarding Quality (High)

- **Rationale:** The firm-wide 30-day onboarding completion rate of 63% is 21 points below the sector benchmark of 84% and 29 points below the firm's own 92% target. Exit theme #4 confirmed a zero-onboarding experience for the departing Associate Consultant in Risk & Compliance Advisory. Sector data shows first-year voluntary turnover at 22% median; poor onboarding is a known driver.
- **Success Measure:** Onboarding audit completed by the 10-day checkpoint. Buddy/mentor assignment rate reaches 67% for new hires starting in the next intake window. 30-day onboarding completion rate improves to at least 75% by the next major review checkpoint.
- **Dependencies:** Practice-level compliance data from the HRIS. Employee Relations Specialist capacity.

Actions Not Recommended

Signal	Reason for Exclusion
Communication score above benchmark	The high Communication score (75% vs benchmark 69%) is a positive signal. Free-text comments suggest this reflects Town Hall effectiveness rather than operational communication. A targeted pulse check (Action 14) will clarify whether intervention is needed, but an improvement action is premature without further data.
Strong team relationships (exit theme #10)	This is a retention factor to preserve, not a problem to solve. No action needed beyond noting it as a positive contributor to engagement in People & Culture and HR Systems teams.

Signal	Reason for Exclusion
Exit data utilisation (exit theme #11)	This is a process gap rather than an engagement issue. The establishment of a quarterly exit theme review was already recommended in the HR11 Follow-Up Actions. Duplication here is unnecessary.

Monitoring and Review

Milestone	Date	Responsible
Critical actions (1, 2, 5, 9, 11) - status check	Within two weeks of plan start	HR Director
High-priority actions (3, 4, 6, 7) - progress review	Standard mid-plan checkpoint	HR Director + L&D Manager
Follow-on pulse survey - Digital & Technology re-survey	Next survey wave	People & Culture team
Full engagement improvement plan review	End of programme window	HR Director + full People & Culture leadership
Next annual engagement survey comparison	Next annual survey cycle	People & Culture team