

# ★WELCOA's News & Views

## Going Stealth:

How to Meaningfully Engage Employees  
in Worksite Wellness



A WELCOA Expert Interview with Laura Putnam

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## Going Stealth:

### How to Meaningfully Engage Employees in Worksite Wellness

An Expert Interview with  
**LAURA PUTNAM**

#### ABOUT **LAURA PUTNAM, MA** CEO & FOUNDER, MOTION FUSION INC.



Laura Putnam is a speaker, trainer, consultant and activist on well-being and human performance with a dual focus on empowering individual behavioral changes and facilitating broader organizational shifts. Laura currently serves as the Chair of the American Heart Association's Greater Bay Area 2020 Task Force, and she is a frequent presenter and keynote speaker at national and international conferences and events on wellness. She is an expert in motivation, behavior change, human performance improvement and building healthier, happier and more innovative organizations and has worked with Fortune 500 companies, nonprofit organizations and academic institutions.

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#### ABOUT **RYAN PICARELLA, MS, SPHR**



As WELCOA's President, Ryan brings immense knowledge and insight from his career that spans over a decade in the health and wellness industry. He is a national speaker, healthcare consultant, and has designed and executed award winning wellness programs. Known for his innovative and pragmatic approach to worksite wellness, Ryan looks forward to furthering the WELCOA mission and vision and continuing to position the organization for success for the future.

Ryan Picarella can be reached at [rpicarella@welcoa.org](mailto:rpicarella@welcoa.org).

**L**earn what barriers might be holding you back from engaging employees in onsite wellness initiatives and why “going stealth” might be your next strategy for moving the needle on engagement.



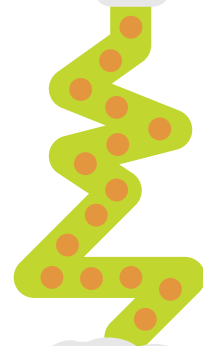
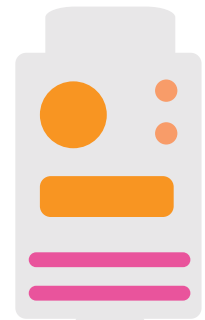
**Q1** Laura, Motion Infusion has been doing a lot of great work on engagement, and I’m curious about how you first connected with the concept of engagement?

**Laura Putnam:** Prior to my entrée into the field of workplace wellness, I worked in the field of education and educational reform. And, in this field, engagement is the name of the game. Everyday, as an urban public high school history teacher, my top priority was to find effective and meaningful ways to engage my students in their learning. Now, as a workplace wellness professional, I’m doing exactly the same thing: finding meaningful and effective ways to engage adults in their health and well-being. The audience has changed (adults instead of teenagers); the setting has changed (workplace instead of the classroom); the subject has changed (health and well-being instead of history)—but the underlying goal is exactly the same: tapping into what truly moves people.

**Q2** That’s a great way to look at it. I have not thought about the parallels between classroom engagement and employee engagement, but they are both similar captive audiences. Do you think that health promotion professionals all share the same definitions of engagement?

**LP:** No, I don’t think that we do—and just arriving upon a convergence on what this over-used and over-sold term actually means is an essential first step in addressing the issue. In general, I would say that we’ve made the mistake of equating participation with engagement—and the two are very different. Participation means to show up—and that’s it. It tells us nothing about the *intention* behind showing up. Are people showing up to “check the box” and get their incentive? Are people showing

“The audience has changed but the underlying goal is exactly the same: **tapping into what truly moves people.**”



up because they want to join their co-workers? Are people showing up because they fear repercussions if they don't? Are people showing up because the activity itself is meaningful? There are an infinite number of reasons why people might be there—and all of these reasons deeply impact whether or not people are going to actually engage and *continue* showing up.

**Q3** What are some definitions of engagement that are in the field today that you think capture true, “ongoing engagement”?

**LP:** I resonate with “ongoing engagement” as being the state in which an individual is *intrinsically* motivated (doing the activity because it is meaningful in and of itself), as opposed to being *extrinsically* motivated (participating in order to *get* something else—or *avoid* something). I actually think that we can get a better definition of what engagement means by looking outside the field of workplace wellness. If we look to the field of psychology, for example, Mihaly Csikszentmihalyi looks deeply at questions like, “What makes life worth living?” and speaks about engagement in terms of being in a state of “flow.” This is when we are truly in the moment. The experience is powerful and completely authentic. We lose track of time and space. We don't want the experience to end. That's what true engagement looks like.

**Q4** So, if you had to just distill all of that into one working definition for engagement, what would that one succinct definition be?

**LP:** I would define engagement as feeling energized and finding meaning—in the moment and *over time*. If we're engaged, it's something that we *want to do*. The opposite of engagement is compliance—something that we do because we *have to*. Any kind of “have to” behavior is nearly impossible to sustain.

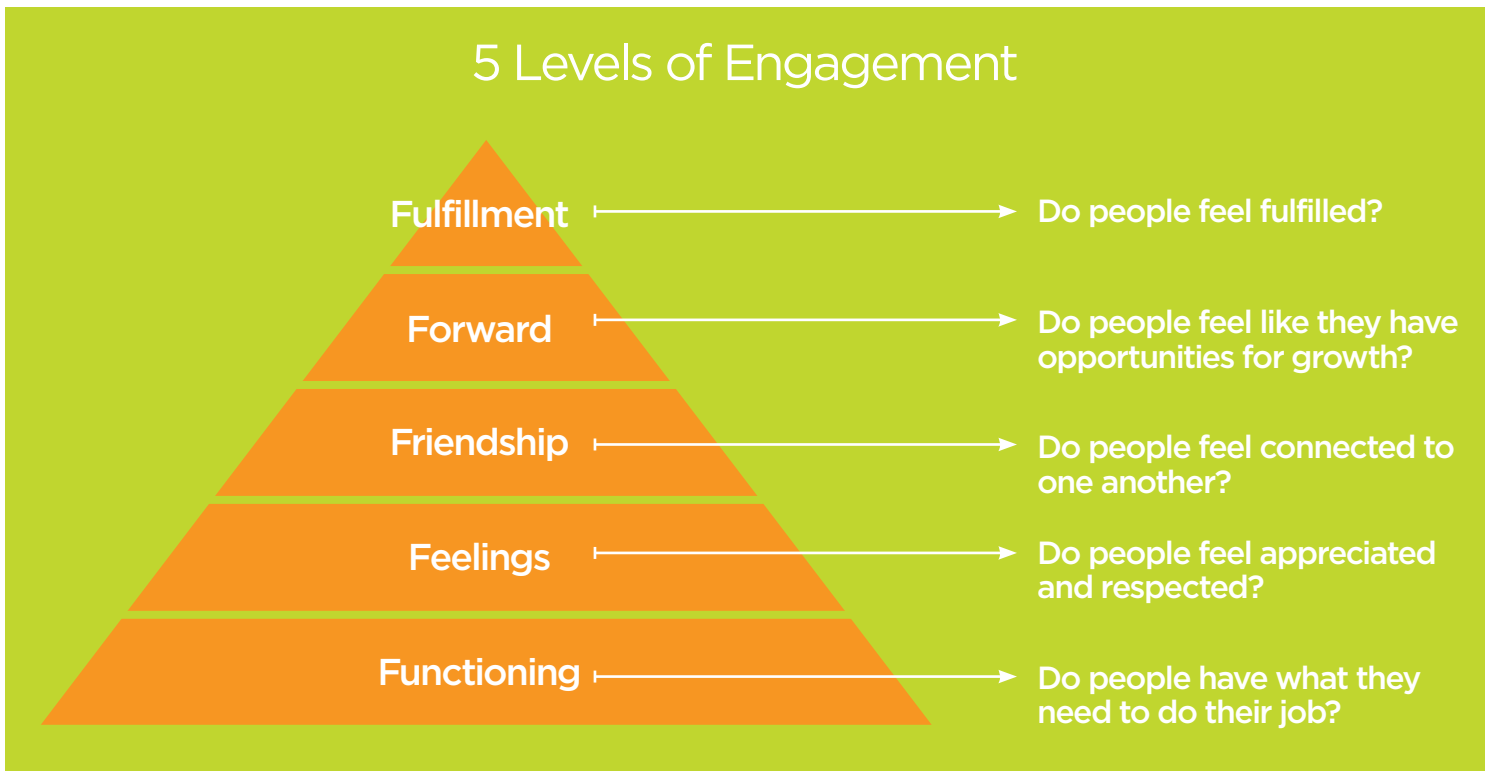
“The opposite of engagement is compliance—something that we do because we have to. Any kind of “have to” behavior is nearly impossible to sustain.”

**Q5** What are your thoughts on how to measure that so that we can create a benchmark and begin moving the needle on engagement?

**LP:** To move the needle on engagement, we have to do a better job of creating “want to” conditions, instead of “have to” conditions—and this really comes down to looking at the workplace itself. To measure the extent to which a workplace has “want to” conditions in place, I like to leverage Maslow’s Hierarchy of Needs to examine five factors: Functioning, Feelings, Friendship, Forward and Fulfillment.

- 1. Functioning Factor:** At a base level, do employees have what they need to do their job? Do they have the resources and tools they need to function? If the “Functioning Factor” is not met, it’s unlikely that will want to engage with any workplace wellness offerings.
- 2. Feelings Factor:** Next, how is the organization doing in regards to the “Feelings Factor?” Do people feel appreciated and respected—by their co-workers, by their manager, by the senior leaders? Or, is it a workplace that fosters a whole lot of hurt feelings? Is there a feeling of trust in the workplace? Or, is this a workplace that tolerates toxic behaviors? If employees don’t feel trust in the workplace in general, it’s unlikely that they’re going to trust any workplace wellness initiative.

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- 3. Friendship Factor:** The next level is what I call the “Friendship Factor.” Do people feel connected with one another in the workplace? Do they have fun together? Are employees encouraged to form meaningful friendships at work? According to Gallup, people who have a best friend at work are seven times more likely to be engaged. And, again, the more the “Friendship Factor” is met, the more likely it is that people are going to want to join others in engaging with workplace wellness.
- 4. Forward Factor:** The next level up is what I call the “Forward Factor.” Do people feel that they’re moving forward in their career and have opportunities for growth? Do people have opportunities to build on their strengths? The more people feel like they’re moving forward, the more likely they are to engage with both their work and with any wellness offerings.
- 5. Fulfillment Factor:** And, then finally, at the very top of this is what I call the “Fulfillment Factor.” Do people feel a deep sense of purpose in their work? If you were to ask people, would they tell you that their work feels like a job, a career—or does it feel like a calling? This is a question that Chip Conley asked his employees—and Tony Hsieh, CEO of Zappos, has followed suit.

All five of these factors largely determine whether or not the overarching culture is a “want to” culture—or a “have to” culture. The more it feels like the latter, the *less* likely people are going to authentically engage with any workplace wellness initiative. Conversely, the more it feels like the former, the more likely people are going to engage with workplace wellness.

**Q6** Over the last couple of years, increasing engagement in wellness programming has become a core focus for health promotion practitioners. Why do you think that engagement has become such an important metric and concept in health promotion?

**LP:** Engagement has become the focus because, by and large, we’re simply not doing a good job of it. The typical pattern we see in most workplace wellness initiatives is what I call the “dropping off” phenomenon: decreasing rates of participation so that by the time we get to the actual programs, less than 20 percent of eligible employees are even showing up. This really speaks to what we talked about earlier: participation versus engagement. It’s not uncommon for organizations to get relatively high levels of participation in say, HRAs, especially if there are incentives attached. But, then, very few go on to join in with the ensuing programs. So, this then begs the question, “Why not? And, how can we do a better job—not just with initial engagement, but with *ongoing engagement*?”

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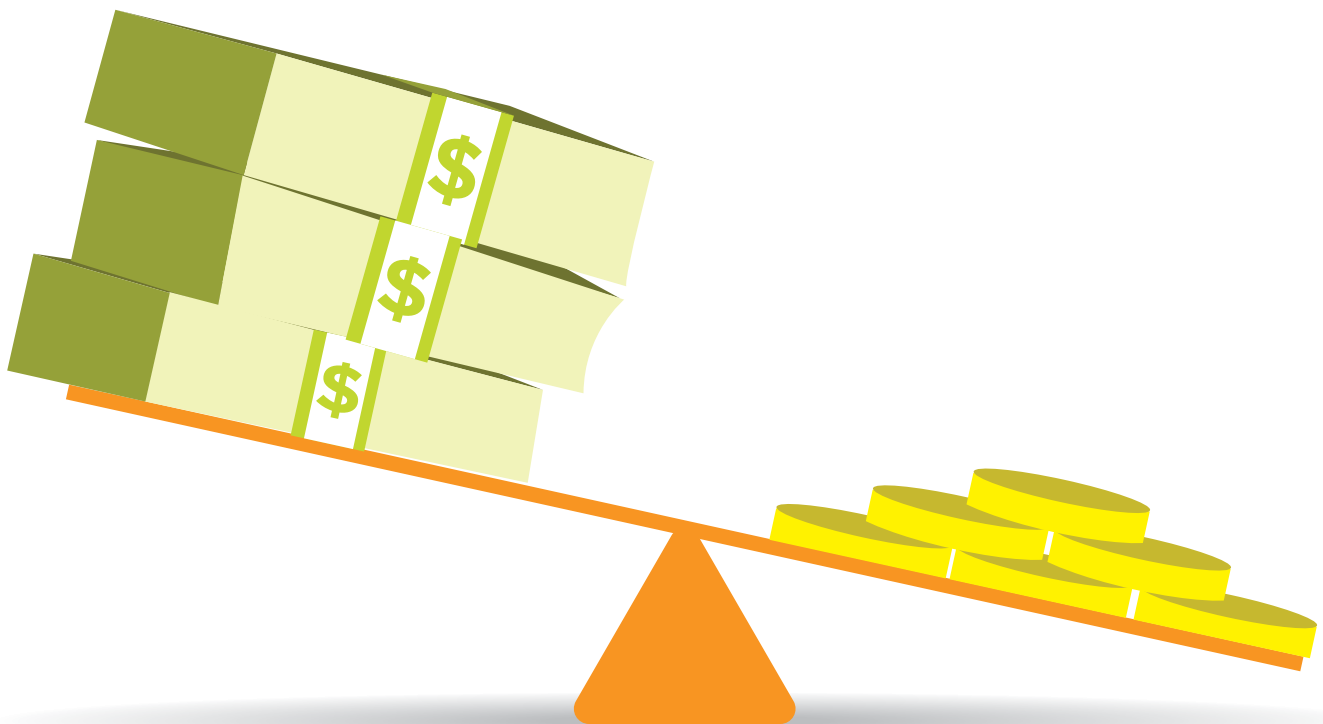
## Q7 Why do you think the workplace is such an ideal setting for the type of work you are doing in well-being and human performance?

**LP:** The workplace is really what we might call school for adults. Just like kids are in school, the vast majority of adults are spending the bulk of their waking hours in the workplace. We have a captive audience, as you mentioned earlier, and that alone makes it a really smart point of entry for impacting health and wellness.

But, now, we're widening the lens to shift our conversation from wellness to well-being and even human performance. This is where I think our work gets really interesting—and also where we're likely to get a lot more traction—especially in the workplace. Why? Because a lot of the key elements of well-being—say, career well-being, social well-being, financial well-being, community well-being and creative well-being—are things that most organizations are already investing in—*heavily*.

Let's look at a parallel industry—one that we should be doing a much better job of partnering with: learning and development. This is an industry that already is focused on human performance and has extensive programming related to things like career development, team-building, professional development, leadership development and innovation training. All of these pertain to well-being, especially career, social, financial, and creative well-being. So, what's the difference in terms of resources going toward each? Workplace wellness is a \$6 billion industry. Learning and development, on the other hand, is a \$164 billion industry. That is a gigantic difference—and represents a huge, largely untapped opportunity for us.

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**Q8** Let's shift gears for a second and talk about some of the barriers to engagement. I'm sure in the classroom, you had your own set of barriers to getting the students fully engaged with what you were teaching. What are some of the bigger barriers that you've noticed when trying to get employees engaged in health promotion programs?

**LP: Barrier #1:** I think the number one barrier is the perception that wellness or well-being is primarily about personal choice. In my view, we've really gotten off track by placing so much pressure on the individual to change behaviors and form new habits. We have not looked enough at the role of culture and environment. I would argue that we are less creatures of habit—and more *creatures of culture*. So, if we want people to be more likely to engage with their well-being, we have to do a better job of addressing the culture first to better foster “want to” conditions.

One of the best examples of this is stress. According to the National Business Group on Health and Towers Watson's 2013/2014 Staying@Work Survey Report, stress is the number one workforce risk issue identified by employers. 78 percent of the respondents reported stress as a top issue of concern—and yet, only 15 percent of employers are actively addressing the issue in their workplace. Even if they are, most employers are, unfortunately, pointing their fingers at the individuals. “You need to do a better job of managing your stress.” Meanwhile, too many of these employers are ignoring the rampant levels of stress that are endemic within the workplace itself—which, for many, is the root cause of their stress.

**Barrier #2:** A second barrier I see is that too many employers are looking for easy solutions and are focused on programs, rather than creating a whole new way of being at work. A program is relatively easy to do; changing the way of being at work is really hard to do.

So, this is where I'm focusing my energy right now: changing the conversation from starting yet another program to *starting a movement*. This is what companies like Patagonia have done so well. Yvon Chouinard, founder, started a movement at Patagonia with messages like “Let my people go surfing” and “The work can wait, but the weather can't” (so go out and surf while the waves are good or ski while the powder is fresh). The net result is that well-being at Patagonia is a *way of being*—not just another program.

### LAURA'S 3 TOP BARRIERS TO ENGAGEMENT:

1. Seeing wellness as a matter of individual choice.
2. Focusing on programs instead of way of being.
3. Failing to connect with other things besides physical health.





**Barrier #3:** The third barrier, and perhaps the biggest, is that we need to do a better job of connecting with what really matters to people, not what we *think* is important. For too long, we've been trying to sell "health" and the reality is that health is simply not an immediate or pressing priority for most. Things like career advancement, taking care of family members, or achieving financial stability are more immediately important to people. Bringing us back to our earlier discussion, this speaks to the vital importance of moving beyond wellness to well-being and human performance.

**Q9** You with Motion Infusion have done some great work to help companies start movements for well-being. Are there any examples that you want to give of some of the outcomes that you experienced?

**LP:** I've worked with a lot of different companies and organizations—from large, multinational Fortune 100 companies to government entities to healthcare organizations to schools and academic institutes to nonprofits. In all of this work, my biggest discovery has been the power of "going stealth"—as in, sneak well-being into *non-wellness* initiatives and *not* call it wellness or even well-being. This kind of approach really opens doors, especially in terms of engagement—both bottom up and top down.

One organization that I've worked with is Schindler Elevator Corporation. This is a great example of "going stealth" *and* starting a movement. I was originally brought in by the learning and development/organizational development team—*not* by the wellness team. The learning and development team asked me to help them to design and deliver a two-day "Leadership Odyssey" training program for the company's identified high-potential leaders. The focus of the training was on leadership and "building winning teams." While the explicit focus was not on well-being, we incorporated well-being *into* the programming, especially in our conversations about shifting the culture to support sustainable growth, as opposed to continued firefighting. As a result of this two-day training, these managers now understand the link between effective leadership and personal well-being. Moreover, they are integrating well-being into daily work routines in order to build winning teams. The message of this training has gone viral, leading to additional programs, such as "Safety Odyssey"—a training for top safety managers on the connection between safety and well-being, along with an upcoming "HR Odyssey"—a training for the company's HR team on the connection between HR and well-being. In March, the L&D team will be launching part two of "Leadership Odyssey" to focus more on building this movement. In all of these cases, well-being is connected to human performance improvement not wellness. We need to do a lot more of this kind of "well-being infusion" to really integrate well-being into every aspect of doing business.

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**Q10** I think it is going to interest a lot of people what you said about going stealth and incorporating wellness into other types of programs targeted at employees. What are the other words or other angles that, in your experience, have worked to promote wellness? If we don't say the word wellness, what words do we use? And what advice would you give our members on that front?

**LP:** One good one is “energy”—in lieu of wellness or well-being. People like Tony Schwartz, CEO and founder of The Energy Project, along with Jim Loehr, co-founder of the Human Performance Institute, have done a really good job of recasting wellness as energy—and channeling all of their programs through non-wellness portals, such as training and development. They both ask the question, “What’s your purpose in life and do you have the energy to meet that purpose?” They also use clever language like “Manage your energy, not your time.”

Another good one is “sustainable engagement”—a term coined in a Towers Watson 2012 Global Workforce Study. This report, in my view, is a must read for any workplace wellness professional that wants to get up to speed on how to better speak language that resonates for decision makers. In this report, the authors uncover critical gaps in traditional employee engagement (which is a top priority for most business leaders). The first gap this report identifies is enablement: “enabling workers with internal support, resources and tools.” The second gap they identify is energy: “creating an environment that’s energizing to work in because it promotes physical, emotional and social well-being.” Wow! It’s all right there for us. This report singlehandedly gives us a lot more leverage in building the case for well-being and showing how it connects to initiatives *beyond* wellness.

Another key phrase that I’m finding resonates well with a growing group of mission-driven leaders is “starting and building a movement.” Leaders like fashion designer and CEO Eileen Fisher has long spoken of “business as a movement.” We’re hearing a lot about companies like Zappos, Patagonia, Costco, Timberland, Whole Foods, Southwest and Starbucks—so-called “firms of endearment”—that are taking a more humane and “make the world a better place” approach to business, and in doing so, are outperforming their competitors. This wave of conscious capitalism is a golden opportunity for us—truly. It finally gives us the long-awaited opportunity to move beyond the ROI conversation to really focus on the *value* of workplace wellness—and the critical role that it plays in improving lives and making the world a better place.

“This wave of conscious capitalism... finally gives us the long-awaited opportunity to **move beyond the ROI conversation to really focus on the value of workplace wellness.**”



I recently advised the wellness team at Chesapeake Energy, based in Oklahoma City, helping them to launch a “refresh” of their workplace wellness platform. Rebranding it as “Join the Movement,” Amanda Parsons, Employee Health Analyst, and Toni Parks-Payne, Fitness Center Director, are leading the way, moving away from the classic wellness model to a *movement*-based model that (1) places a higher emphasis on intrinsic motivation, (2) encourages a more interdisciplinary and collaborative approach, (3) expands the conversation from physical risk factors to holistic and multidimensional well-being, and (4) focuses more on building a flourishing culture and environment that fosters autonomy, high performance and sustainable engagement. When Amanda recently presented this new platform to the executive team, the CEO, Doug Lawler, enthusiastically responded with “This is a movement! This is not just a program! This is something that’s going to build leadership capacity!”

**Q11** What are some recommendations that you have for health promotion practitioners to get people more engaged, to move beyond the phase where they are just checking a box?

**LP:** Lasting engagement really starts and continues with intrinsic motivation. So, the question is how we help to unleash that intrinsic motivation? Well, for starters, we need to fully come to terms with and accept the fact that we can never “get” anyone to be motivated and to engage with anything—their work, their family, their health. We all have to motivate *ourselves* and engage on our own terms. It’s called free will—and this is the essence of being human. So, in addition to creating these “want to” conditions that we spoke of earlier, there are really five key components we should always keep in mind when designing and delivering any kind of workplace wellness or well-being program.


1. **Competency:** All of us have a deep need for competency. And, this really starts with building on strengths. What are people doing *right*, right now, especially in the area of well-being? And how can they do more of what they’re already doing right?
2. **Autonomy:** Another key is autonomy. We all have a deep need for autonomy; we all want to do things on our own terms. In fact, according to an Australian hospice nurse Bronnie Ware who worked with dying patients for years, the number one top regret she heard was “I wish I’d had the courage to live a life true to myself, not the life others expected of me.” So, this is something we should be thinking about in every wellness or well-being program we create.
3. **Relatedness:** We all have a deep need for being in connection with one another. This is something that a lot of these social media and engagement platforms are leveraging. This means, for example, rather than just setting goals in isolation, or even setting goals with just a health coach, create a social



platform for employees, managers and senior leaders to set personal goals and then share these out with one another. Then, provide a mechanism for people to give one another feedback and support.

- 4. **Purpose:** The next piece in the intrinsic motivation matrix is purpose. This is closely linked with autonomy, as it starts with empowering people to identify what matters most to them—not us. As we discussed earlier, health just doesn't really matter that much to a lot of people because it feels too far off in the future. So, we have to help people to tap more into what is meaningful right here, right now.
- 5. **Play:** And, then finally, the last key is play. We all are hard-wired to play. Stuart Brown, professor at University of California at Berkeley, has done a lot of research into this. All of us, his research shows—kids, adults, animals, are literally hard-wired to play. If it's not fun, people simply aren't going to do it.

**Q12** Are there any final thoughts or words of wisdom that you'd like to share with WELCOA Members?

**LP:** A final thought is that we need to recast workplace wellness as a movement. My upcoming book *Workplace Wellness That Works* is entirely organized around this concept: (1) start a movement, (2) build the movement and (3) make it last by giving people the tools to *engage* with the movement. This really starts with us—and redefining ourselves as “agents of change.” How can each of us be as influential as someone like Oprah Winfrey? What are some of her best practices? This, I believe, starts with being bold, painting a vision that's worth working toward, focusing more on getting emotional buy-in, and then coming up with the small steps to make it happen. 

“A final thought is that we need to **recast workplace wellness as a movement.**”

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***Demystifying Engagement,***  
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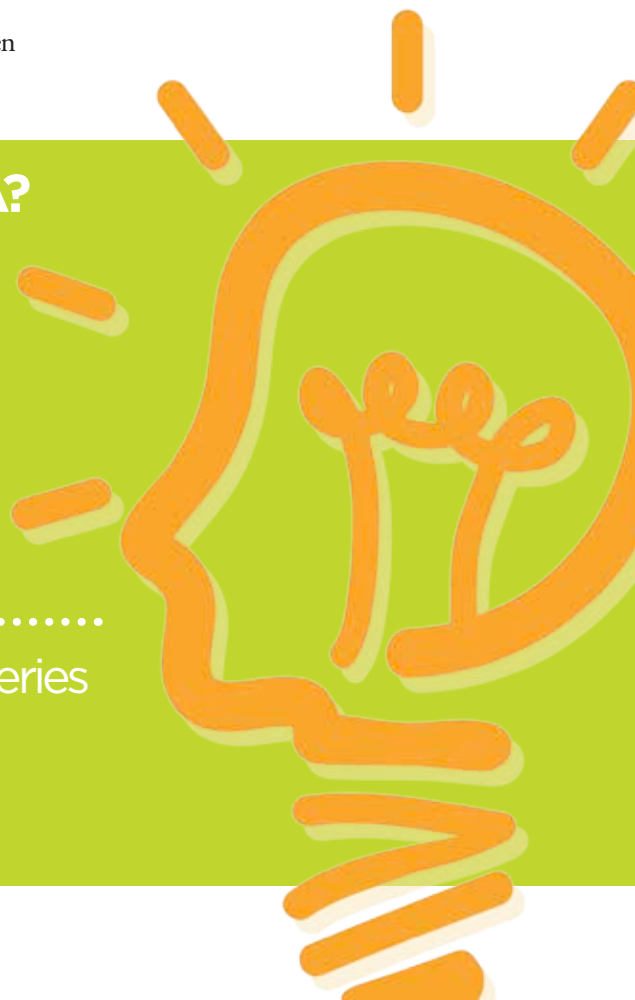
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