

**MARKS & SPENCER Plc**

**Total Health Management System and  
Workforce Effectiveness**

**Tommy MacDonald Milner**

**Head of Occupational Health Services**

***Business & Mental Energy at Work***

***The Second Annual Global Symposium***

***25th October 2001***

# Marks & Spencer PLC



- ⇒ **320 Retail Stores, owned and managed - UK & Eire**
- ⇒ **55,000 permanent staff (up to 7,000 temporary seasonal)**
- ⇒ **83% female; 62% part-time; long service**
- ⇒ **Retailing = Sales, tilling, warehouse**
- ⇒ **Specialists = Food hygiene/technology, design**
- ⇒ **MSFS - Call centre Finance business (1,500)**



# History - Paternalist Culture



- ⇒ **Jewish émigré families founded and grew business 1894 - 1910**
- ⇒ **Primary Care provision pre NHS = GP, Nurse, Dental, Chiropody - in Stores**
- ⇒ **Post 1947 (NHS) gradually evolved into Occupational Health**
- ⇒ **Preventative Screening:**
  - ☑ **Cervical Cytology 1970 - 2000**
  - ☑ **Breast Screening 1978 and on-going**
  - ☑ **BMI Screening 1984 - 1998**

# Occupational Health



- ⇒ **Multi disciplinary, consultant lead service**
- ⇒ **59 OHA (44 FTE); 66 OHP (12 FTE); working in OH Teams, regionally**
- ⇒ **Proactive approach; Risk Assessment & Management, Health Surveillance**
- ⇒ **Treat & manage casualties, Rehabilitation.**
- ⇒ **Health Education - Workforce & Management**

# Mental Health



- ⇒ Understand work-related impact on mental well being (Policy)
- ⇒ Apply Policy when designing job roles
- ⇒ Use “Tools” to identify early signs (absence, performance, behaviour)
- ⇒ Good referral system to OH (confidential)
- ⇒ Train and develop OH teams - CPD
- ⇒ Comprehensive Rehabilitation programme
- ⇒ M&S Founder member “MindOut”

# Stress Management



## ⇒ Three “pronged” approach:

- ☑ Treat casualties/counseling
- ☑ Specific programmes (Stress Management Intervention (SMI))
- ☑ Understand causes and influence HR mgmt

## ⇒ Resource Systems since 1992 - PMI survey

## ⇒ “Managing Your Pressure” - 2 days – Management

## ⇒ “Pressure Management” - Half day - Staff

## ⇒ M&S Direct - specific intervention

# M&S Direct



- ⇒ **One third of all sickness absence is either directly attributable to stress or closely related to stress.**
- ⇒ **140.5 weeks lost in the Call Centre as a result of stress, anxiety, depression and other related conditions**
  - ☑ 6<sup>th</sup> November 1999 to 25<sup>th</sup> March 2000

**MARKS & SPENCER DIRECT**

---

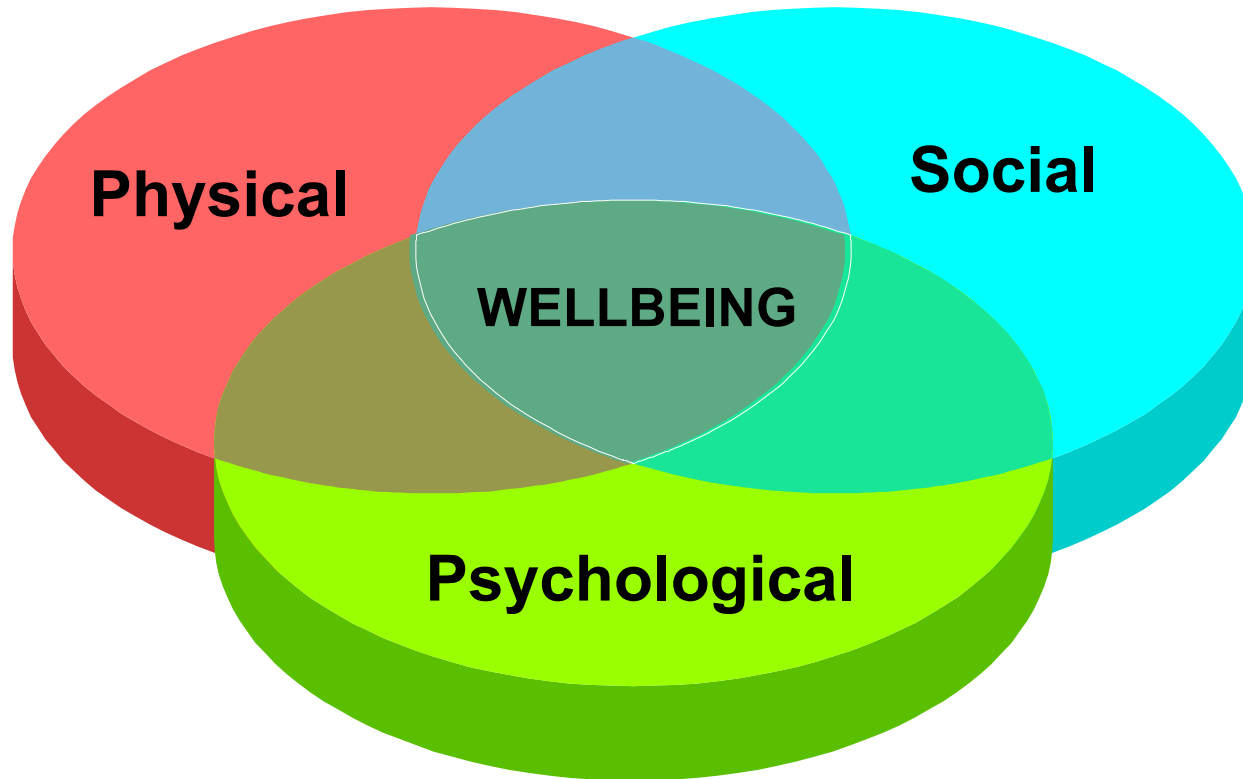
**Wellbeing & Motivation Survey**

**Lesley Cooper  
WorkingWell Limited**

# Employee Wellbeing Matters

---

What is Wellbeing?



**When all these aspects of health come together!**

# What can damage Wellbeing?



**From Home**

**From Work Demands**

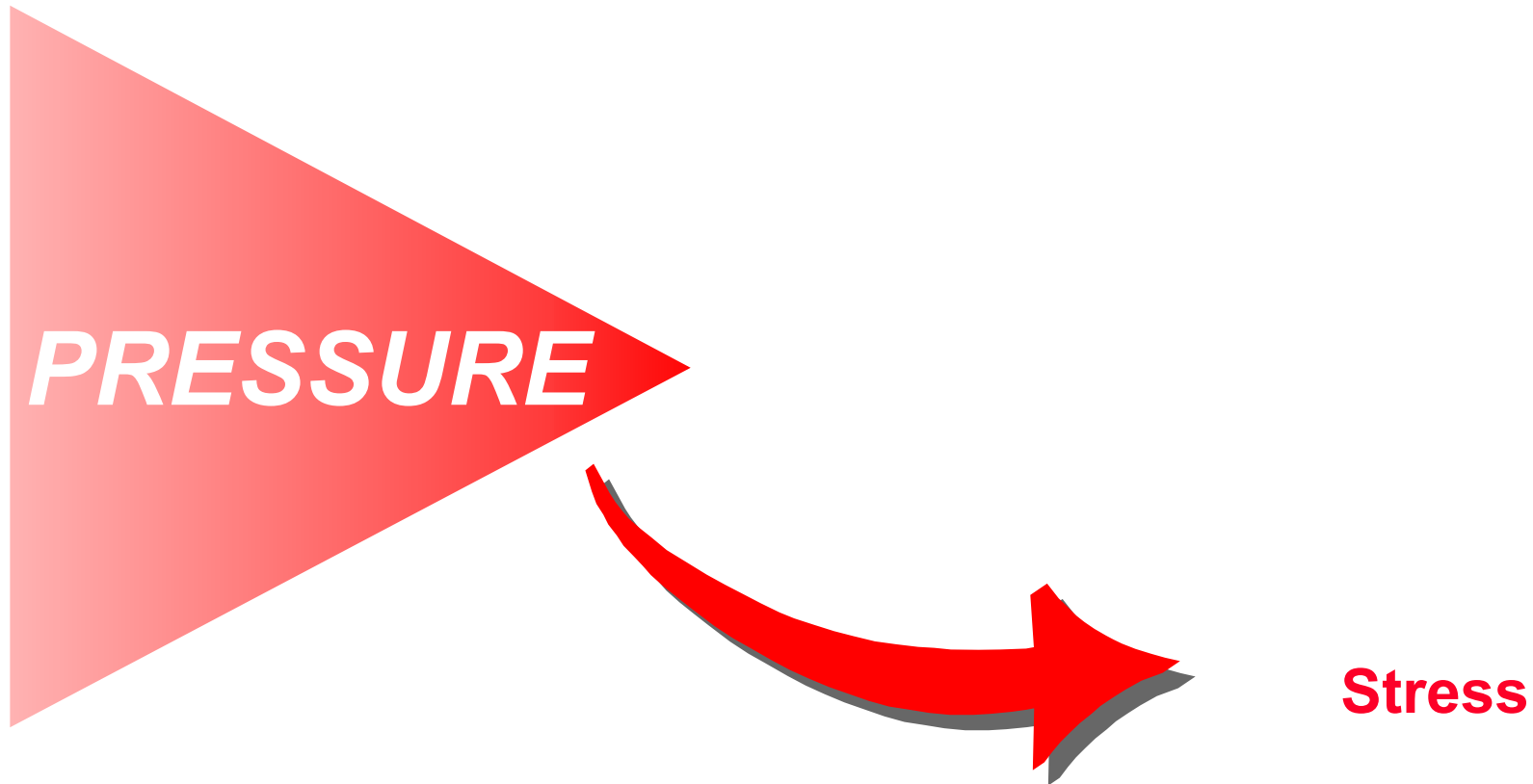
**From Balancing the two**

# Where do work pressures come from?



- ⇒ **Daily Hassles** - the little things that get in the way
- ⇒ **Workload** - too much or too little
- ⇒ **Difficult working relationships**
- ⇒ **Recognition** - not enough or the wrong sort
- ⇒ **Organisational climate** -the way it feels to work here
- ⇒ **Personal responsibility** - too much or too little
- ⇒ **Home/Work balance** - juggling sets of demands

**“Wellbeing is damaged when pressures combine and become greater than our ability to deal with them”**



**All sources of pressure combine to create stress**

# What can increase Wellbeing?

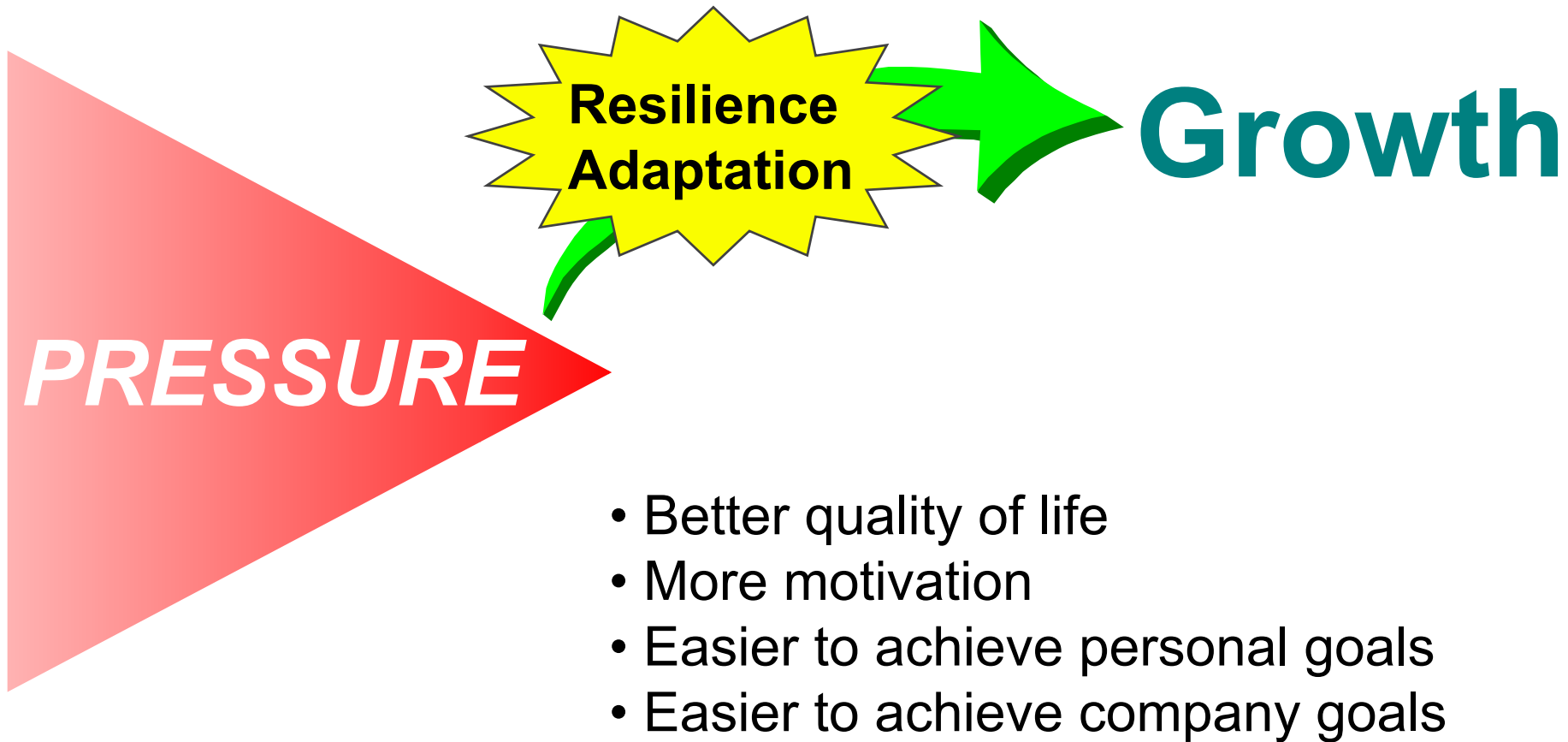


**From Home**

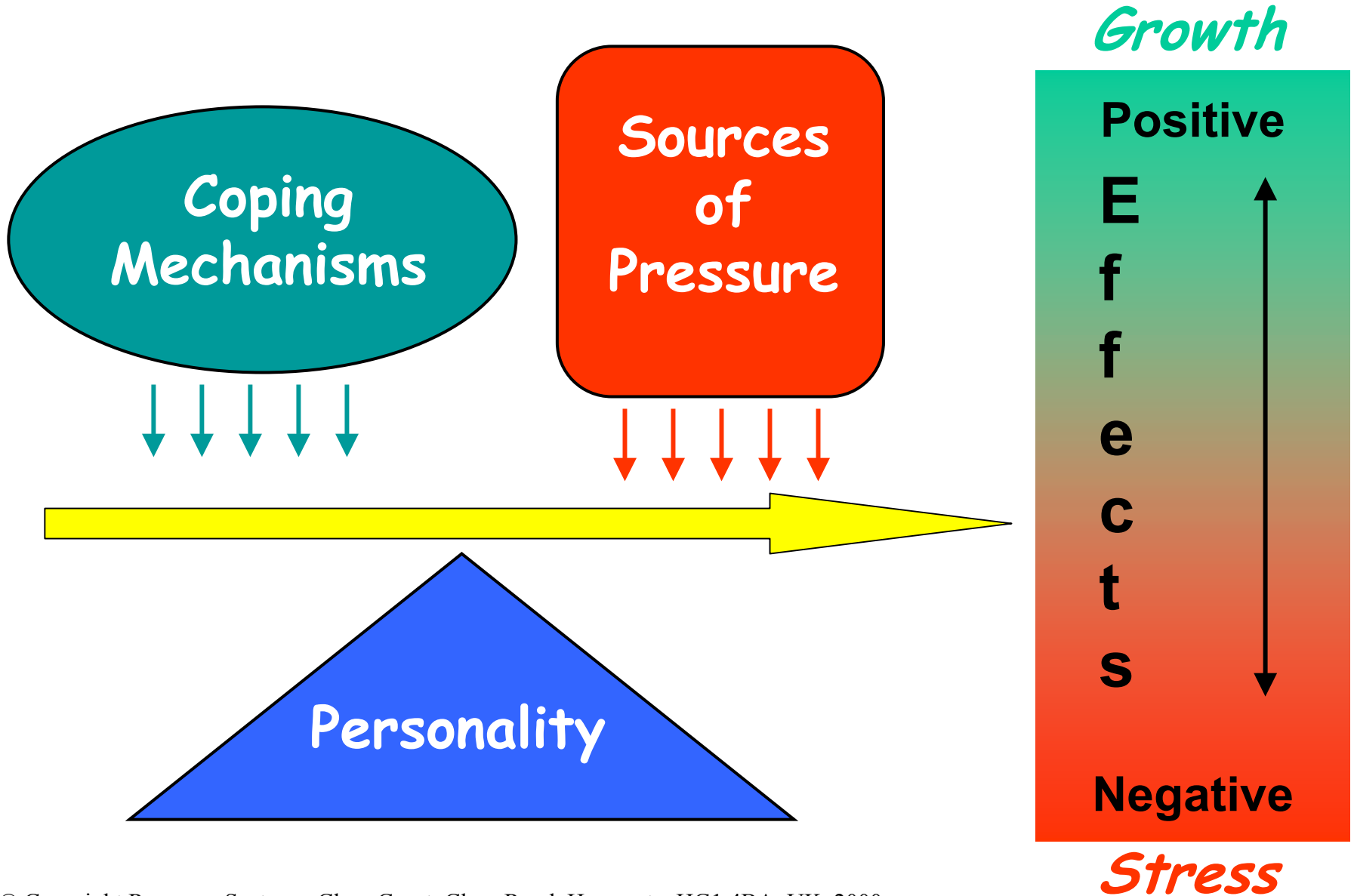
**From Work demands**

**From Balancing the two**

**“Growth occurs when we are able to adapt to or overcome the challenges we face in our life.”**



# The Dynamics of the Stress Process

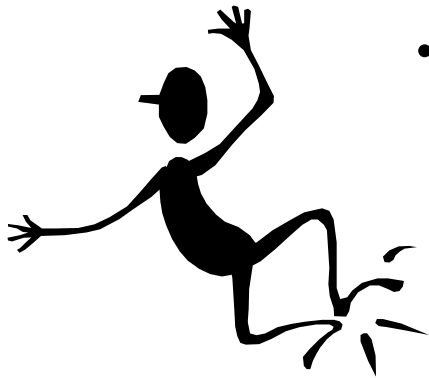


# Why M&S commissioned the survey

---

- ⇒ M&S employees face pressures at work
- ⇒ These pressures comes from a variety of sources
- ⇒ They affect people in different ways

One persons challenge..  
...is another one's stress!



## The WMI Survey - Getting some real information

---

Collect the evidence  
so that M&S Direct can make  
decisions based on fact...

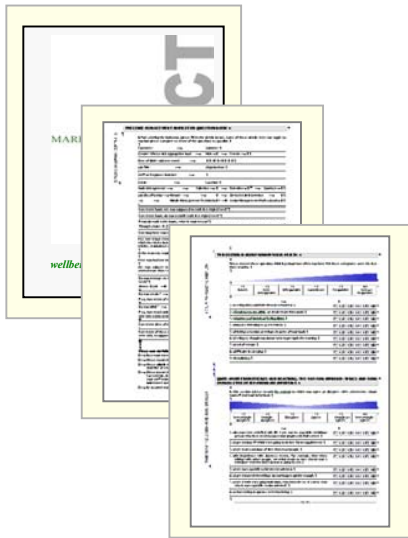
...not on anecdote

and find the root cause of the  
pressures

# The Wellbeing & Motivation Indicator

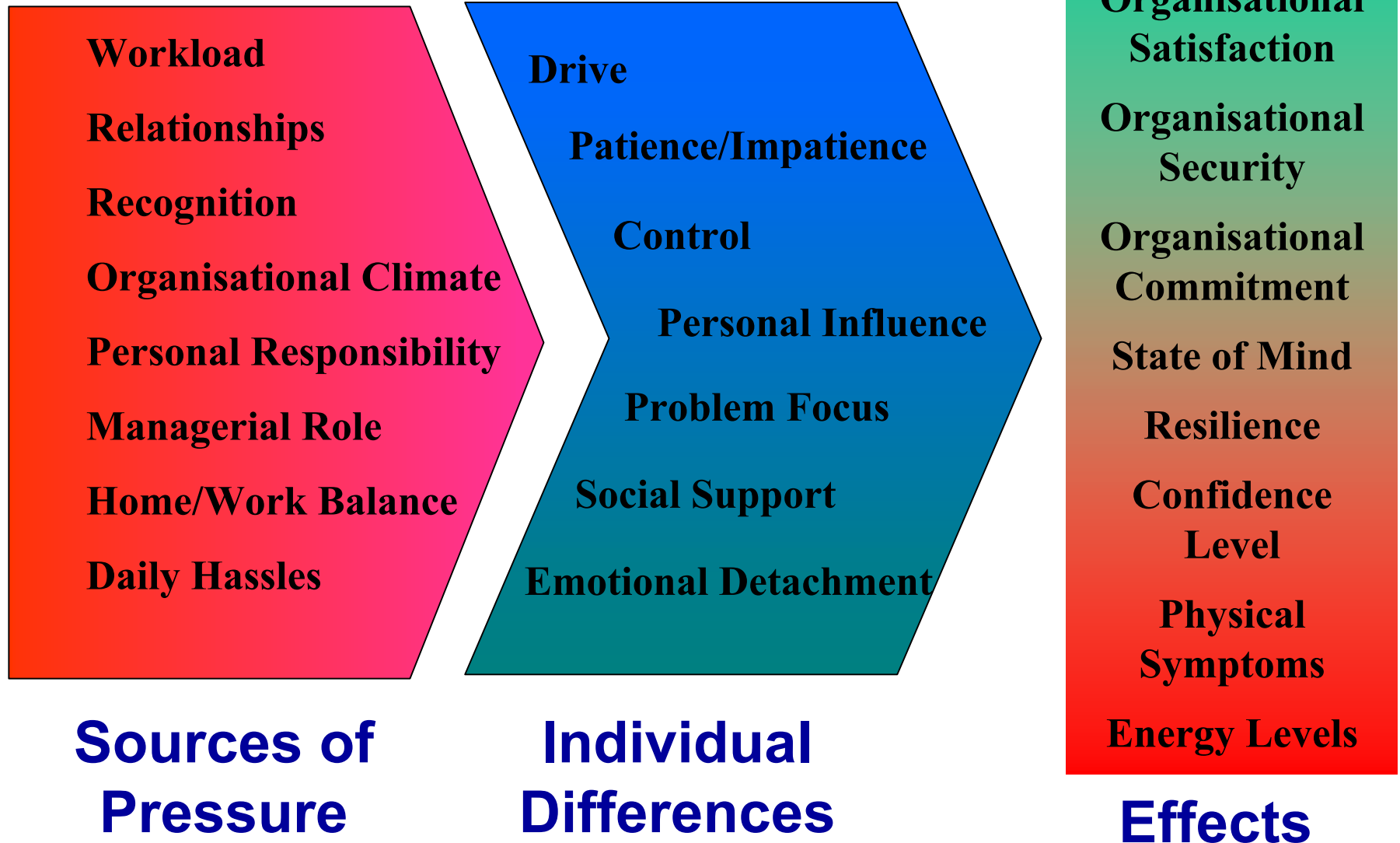
## ➔ Main Points

- ✓ the world's first questionnaire to measure all aspects of wellbeing at work
- ✓ extensively benchmarked - used by over 30,000 people
- ✓ valid - measures what it's meant to measure
- ✓ delivers usable management information



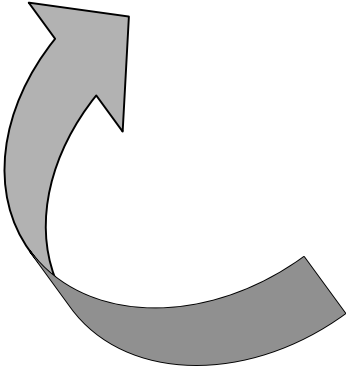
**The Gold Standard in Wellbeing Measurement**

# WMI Measurement Domains



# What did individuals gain from this process?

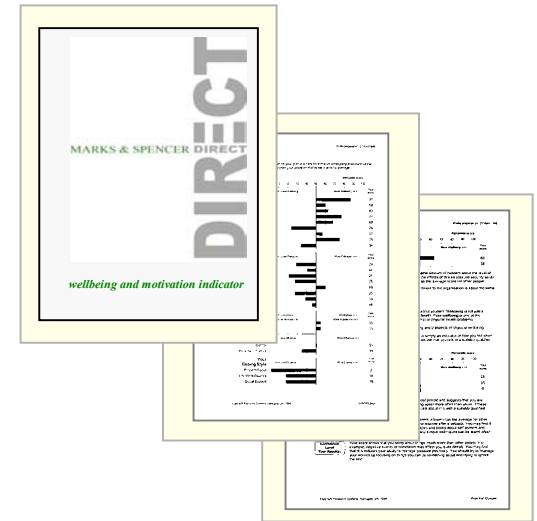
**Personal  
Individual  
Feedback**



# The Personal Profile

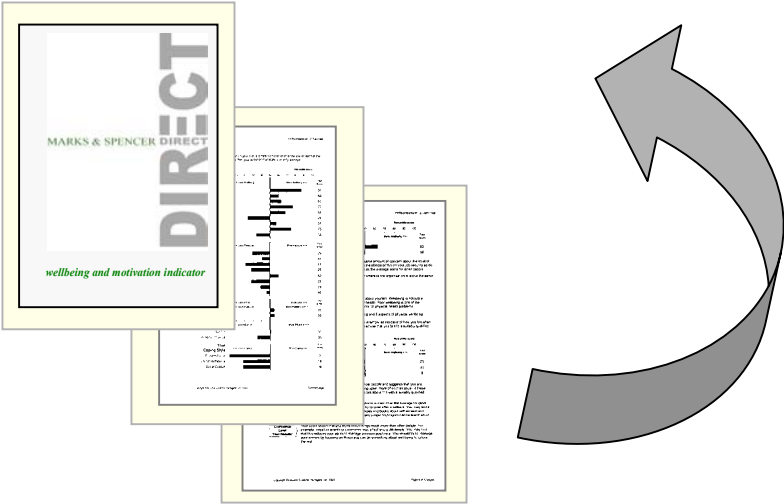
## ➔ Main Points

- ✓ 12-page computer generated report
- ✓ gives an accurate picture of your current state of wellbeing
- ✓ helps you understand the way you manage the pressures you face
- ✓ gives practical suggestions for improving your wellbeing
- ✓ allows you to see how you compare with other people



# What did M&S Direct gain from this process?

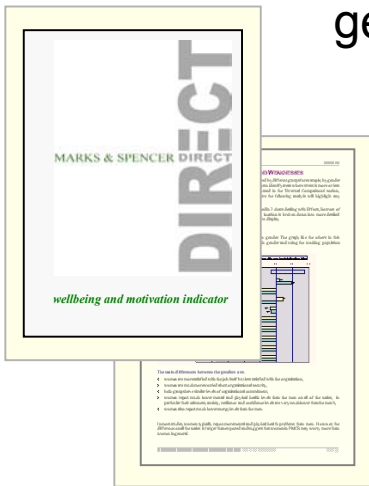
**Organisational and  
Work Group  
Feedback**



# M&S Direct Profile

## ➔ Main Points

- ✓ individual's results are grouped together for analysis
- ✓ helps to identify and prioritise the key issues
- ✓ provides internal comparisons:
  - differences by department, location, grade, job type, gender, length of service, age, and so on



- ✓ Enables identification of “small steps”
- ✓ Can be used on an ongoing basis to measure the effectiveness of changes



**MARKS & SPENCER DIRECT**

**Wellbeing & Motivation Survey**

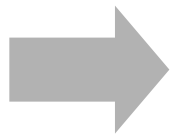
***The Survey Process***

# The Survey Process

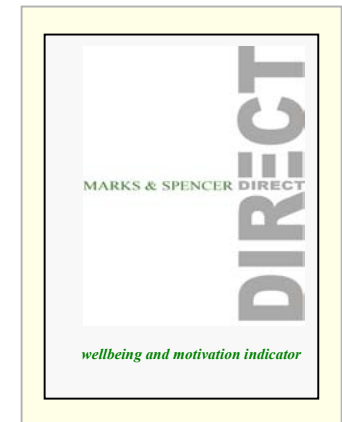
## Management and Team Briefings



- What is the survey about?
- What will you need to do?
- How will you benefit?
- Ask questions



## Distribute Questionnaires

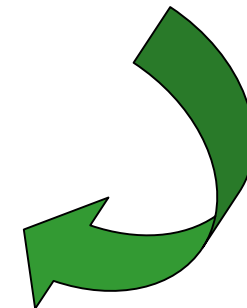
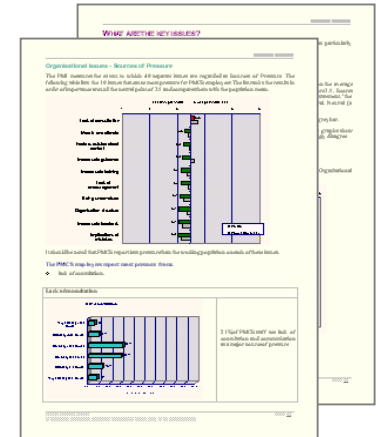


# The Survey Process

## Data Collection and Analysis



Questionnaires  
returned to  
Resource Systems



## Key Issues Analysis

What do the group results mean?

# The Survey Process

---

## Discussion Groups



Confidential discussion groups  
to help us understand more  
about what the group data is  
telling us

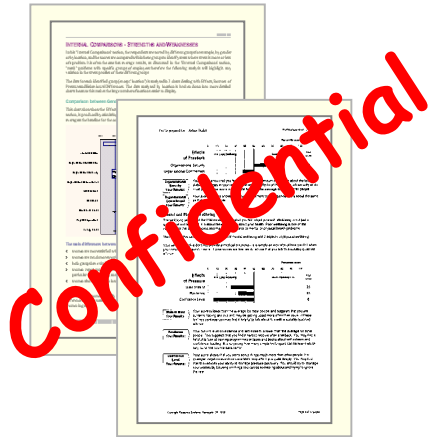
We ask for volunteers!



Tick the box on the Questionnaire!

# The Survey Process

## Produce Personal Profiles:



Personal Wellbeing Profile sent to individuals after the Discussion Groups have been conducted.

Help made available to make sure people get the most from it

# The Survey Process

---

## Feedback Group Findings:



Overall Group results fed back to the Senior Management Group:

- *Map Corporate Issues*

Individual Teams able to see their results and work with the information:

- *Identify local Small Step Solutions*

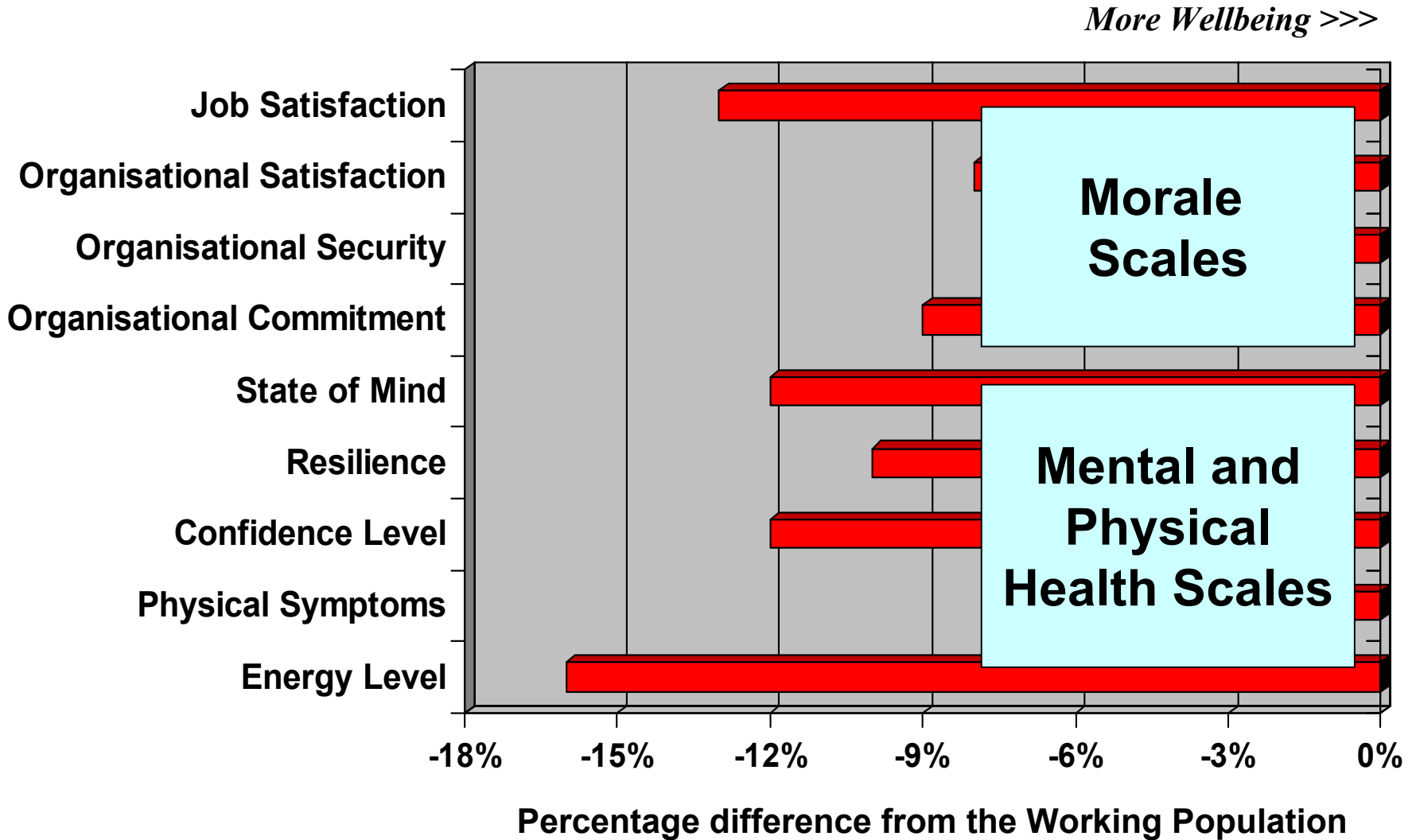


**MARKS & SPENCER DIRECT**

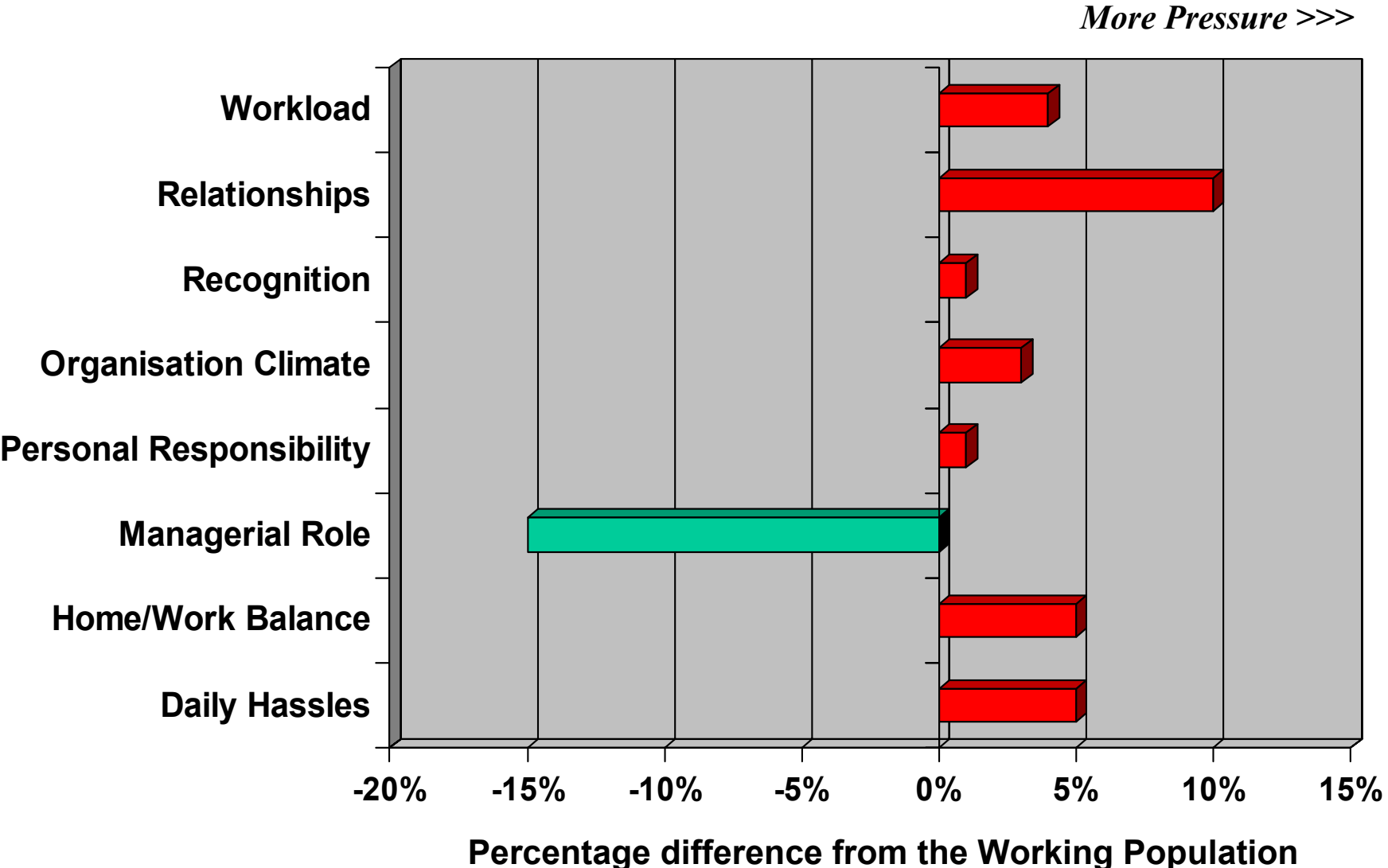
**Wellbeing and Motivation Survey**

***October 2000***

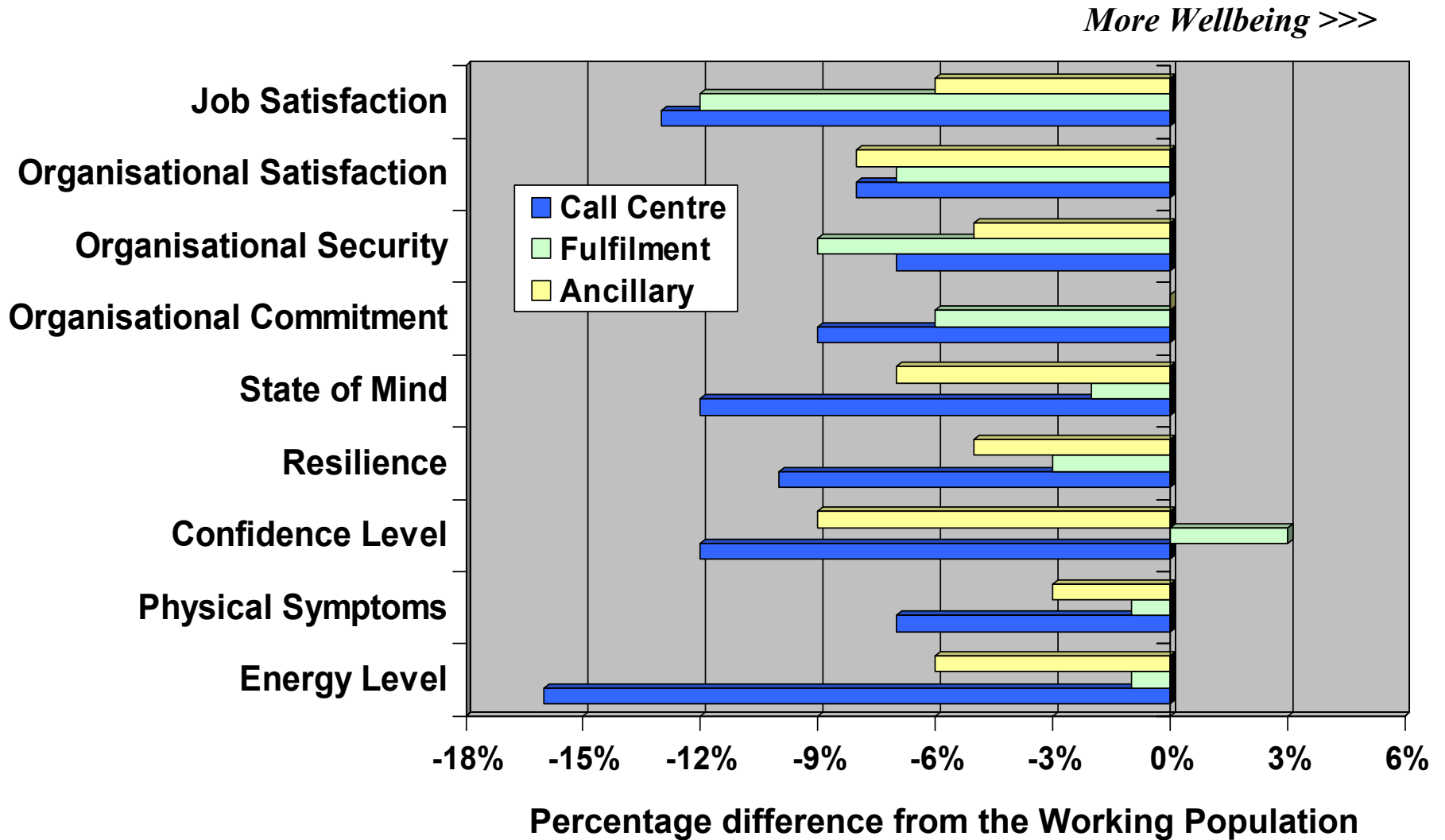
# Effects of Stress



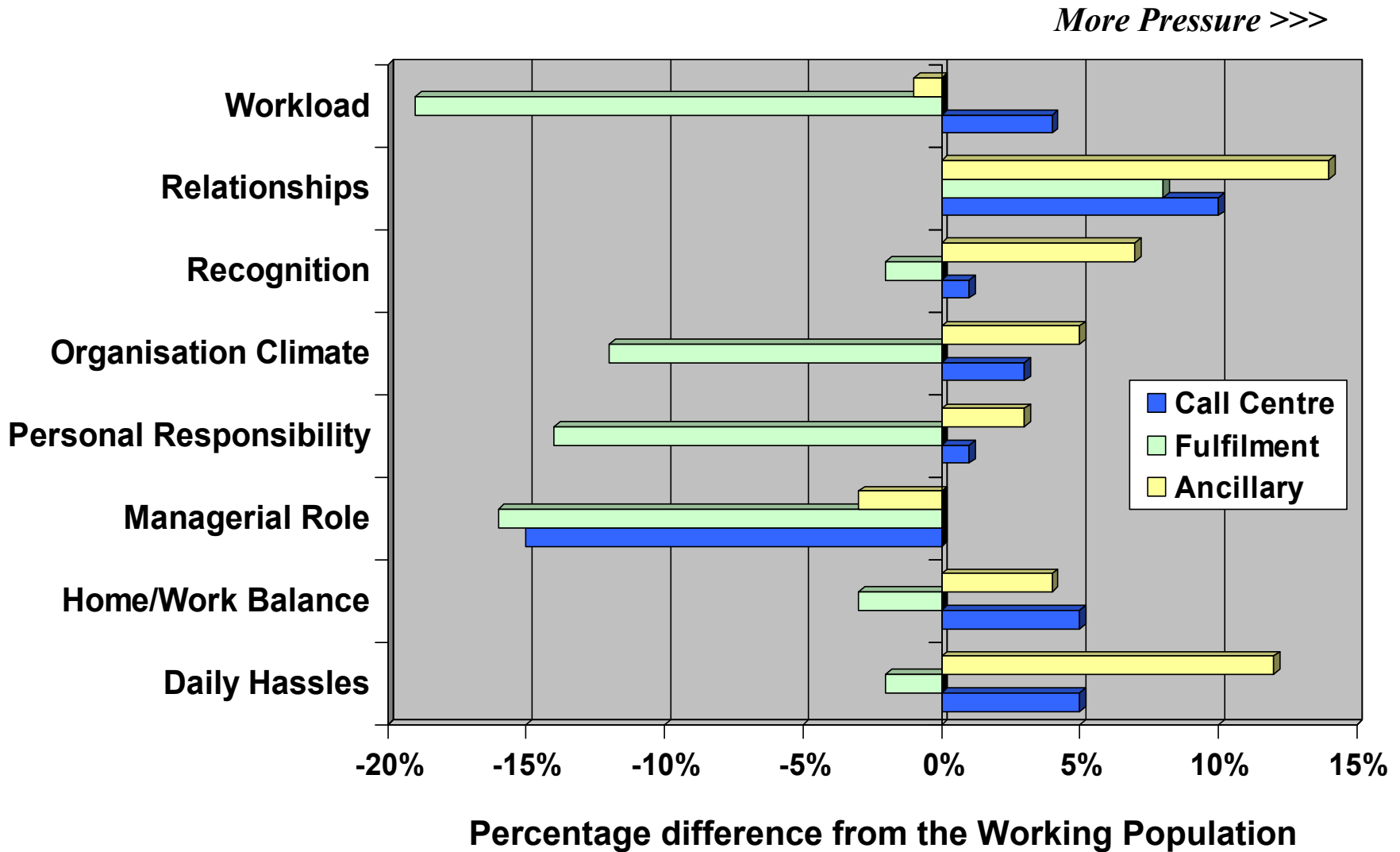
# Sources of Pressure



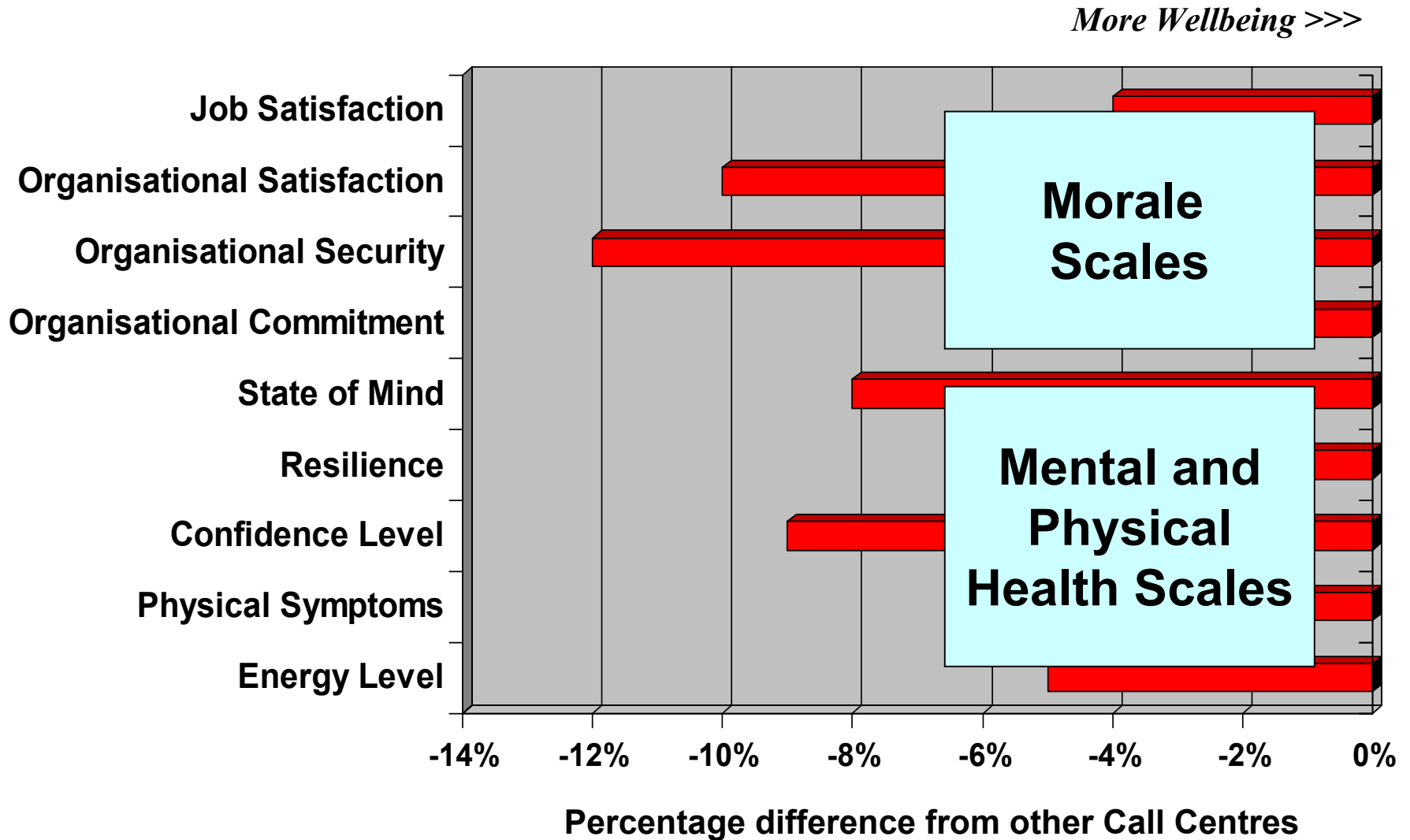
# Comparison by Location - Effects



# Comparison by Location - Sources

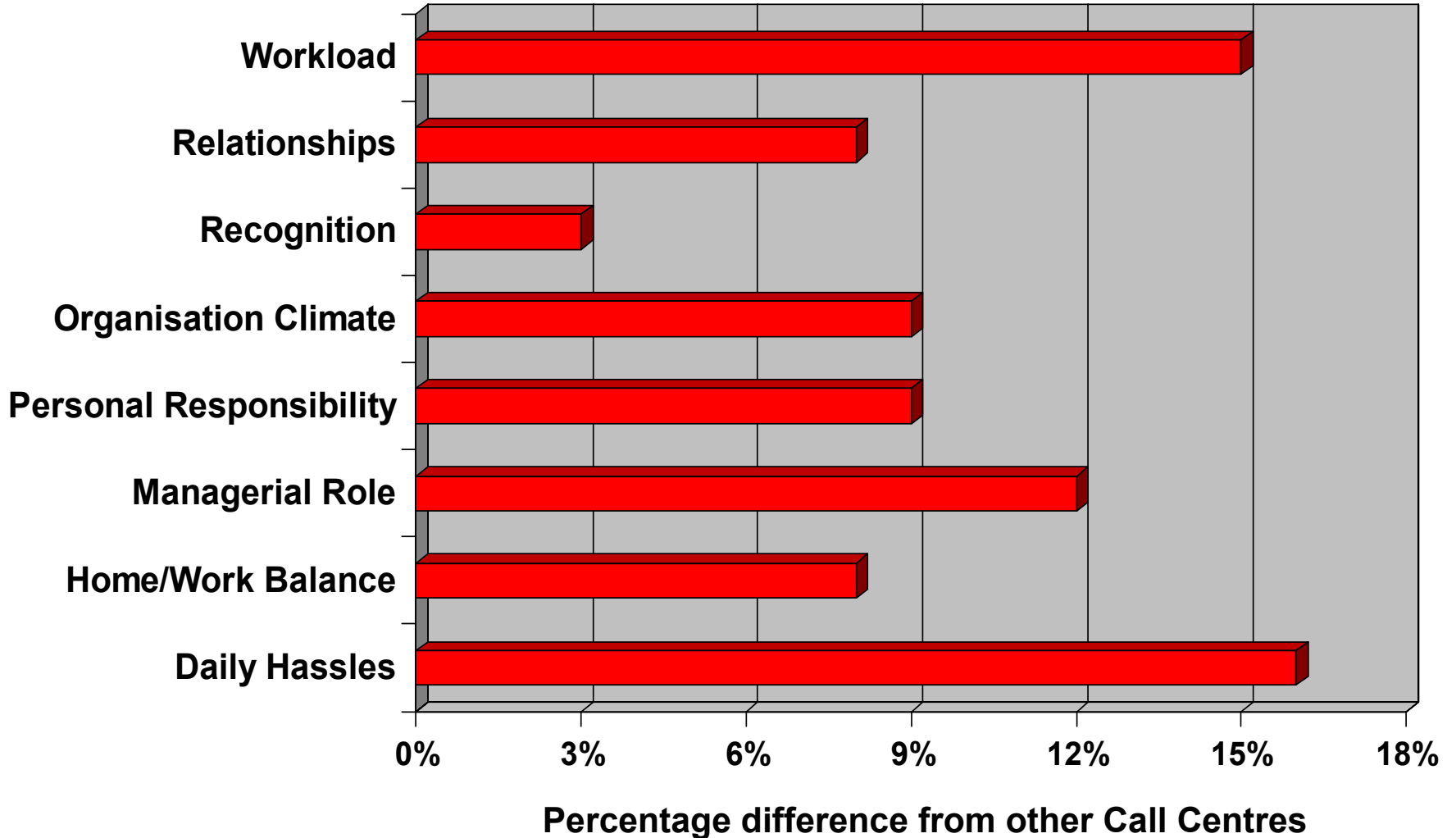


# Call Centre - Effects of Stress

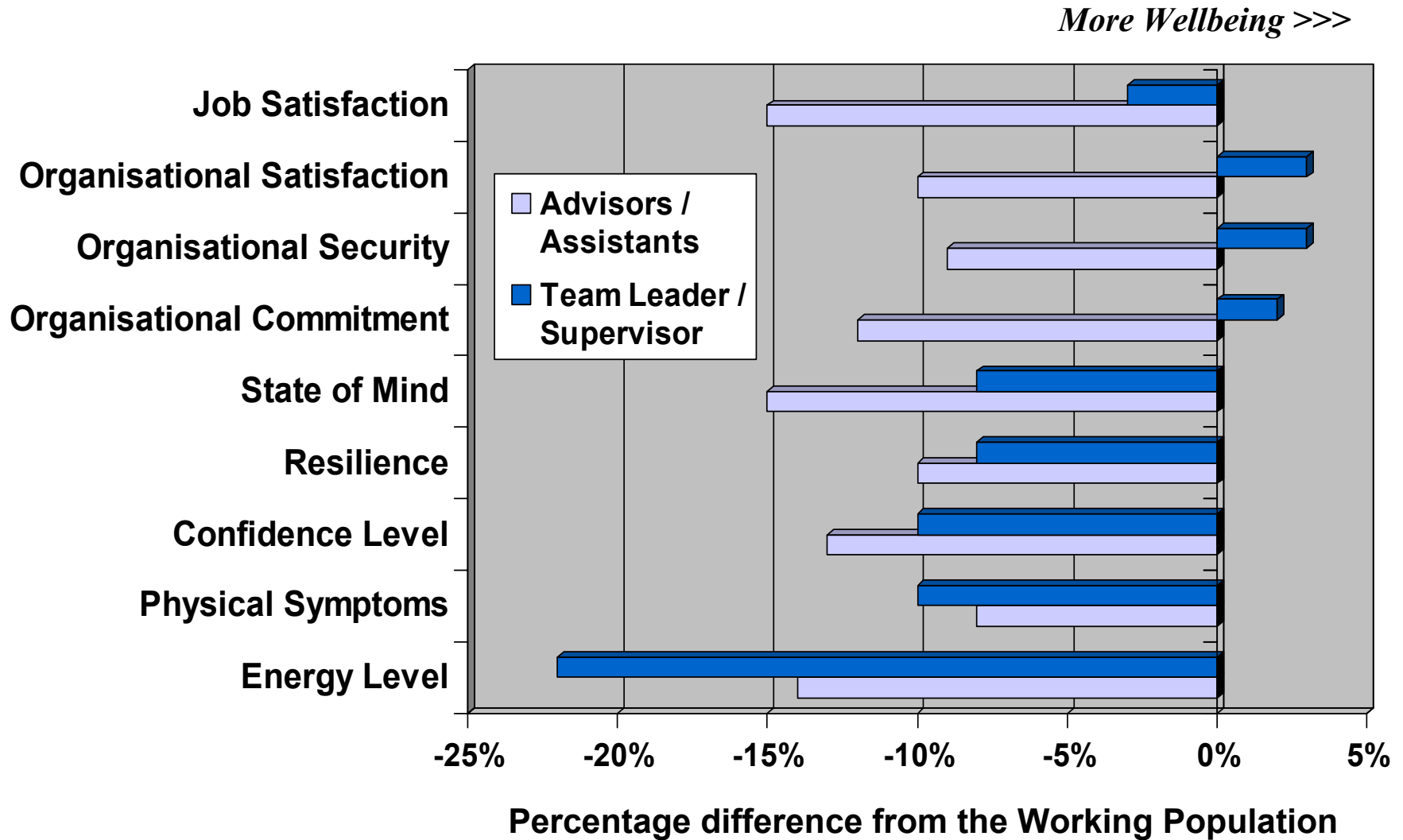


# Call Centre - Sources of Pressure

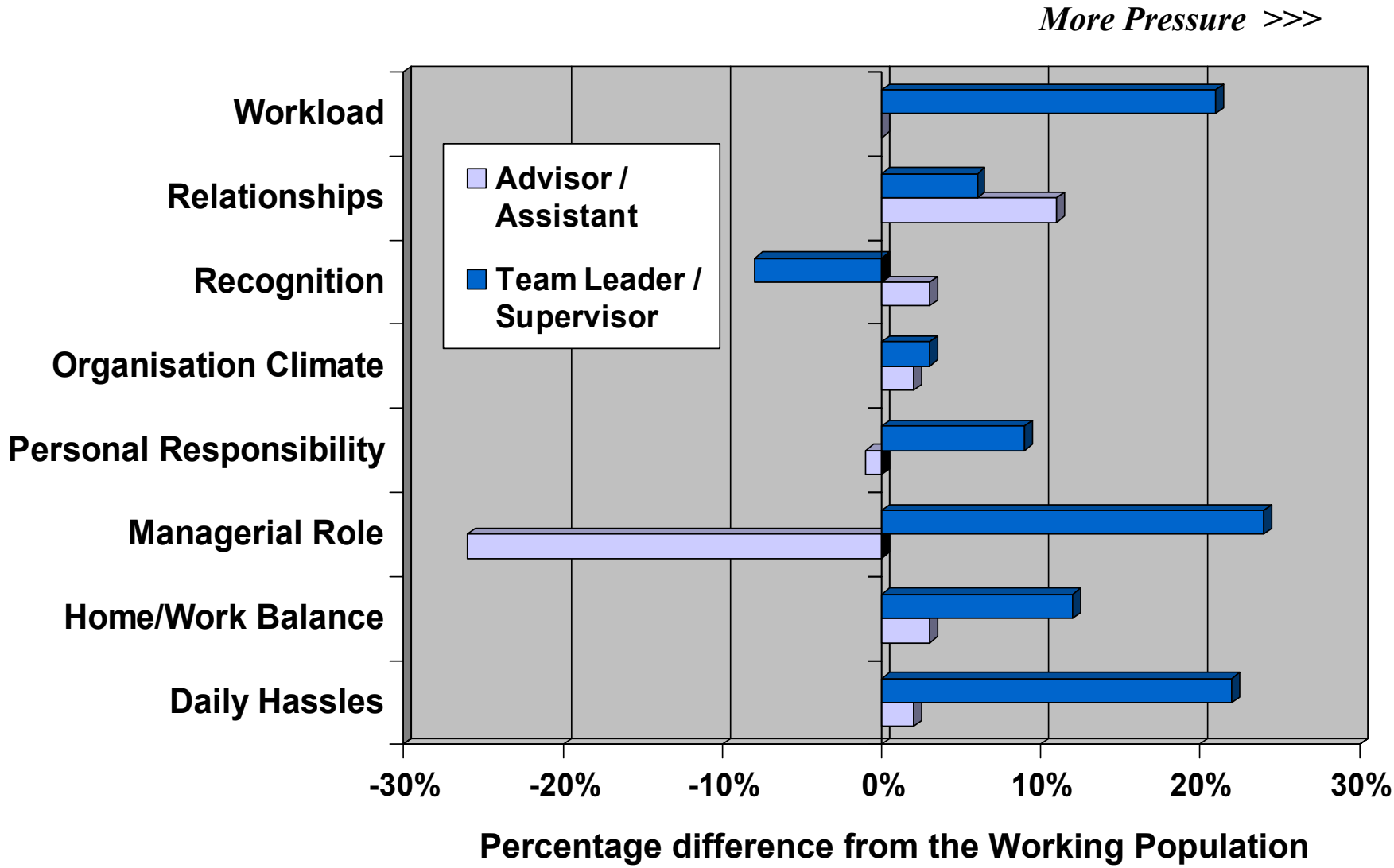
*More Pressure >>>*



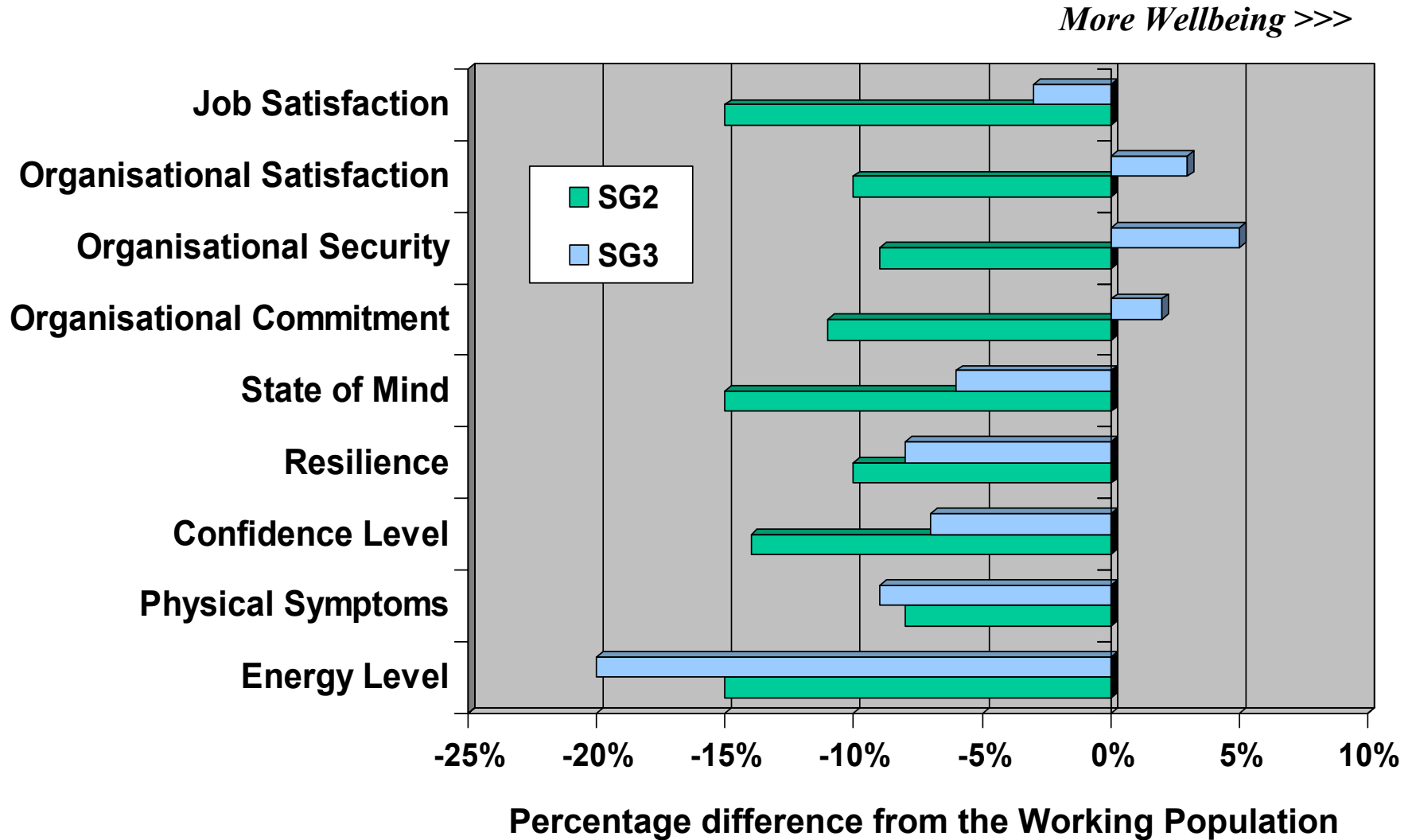
# Call Centre - Comparison by Job Type - Effects



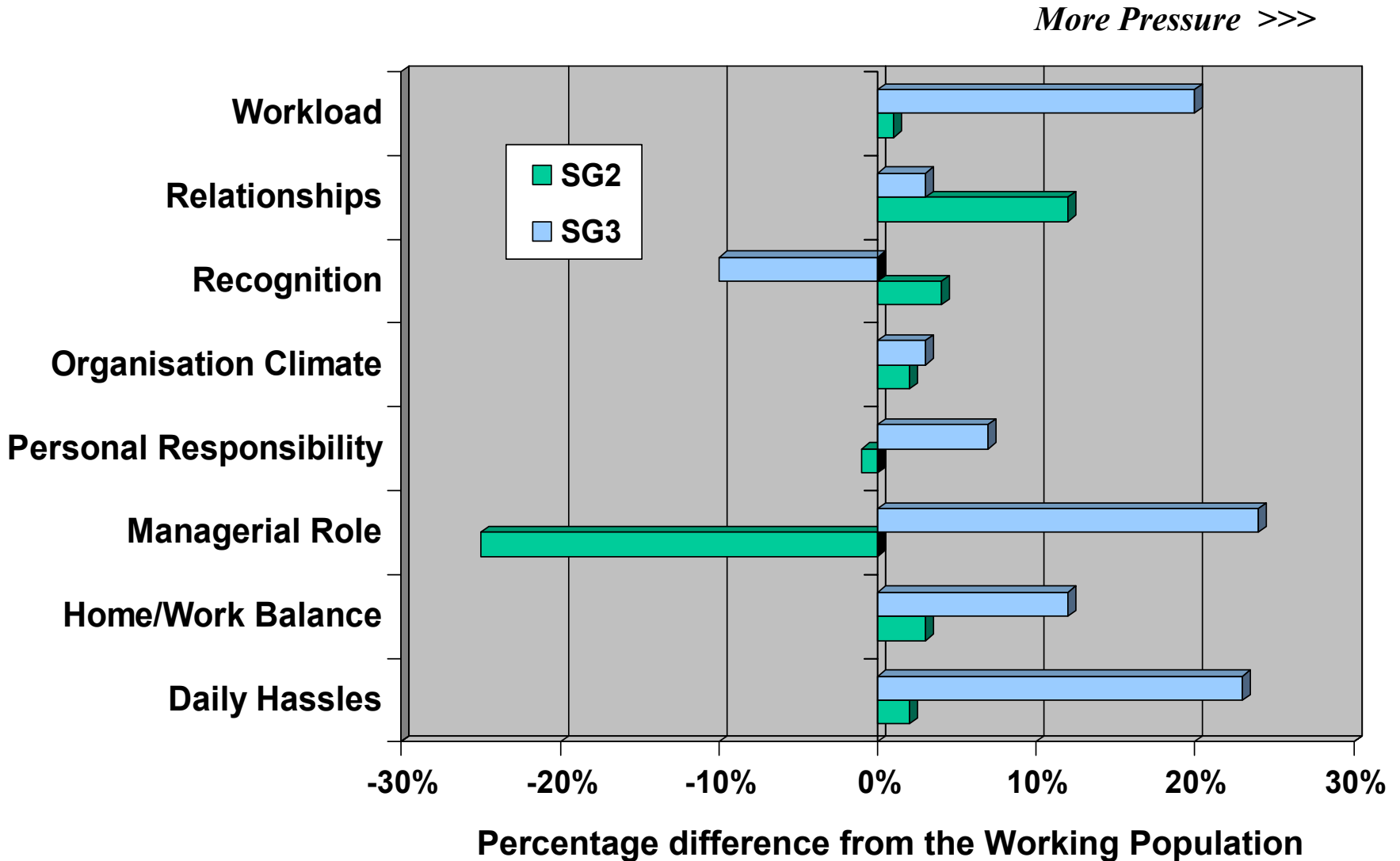
# Call Centre - Comparison by Job Type – Sources of Pressure



# Call Centre - Comparison by Level - Effects



# Call Centre - Comparison by Level - Pressure



**MARKS & SPENCER plc**

**The Way Forward**

**Tommy MacDonald Milner**

**Head of Occupational Health Services**

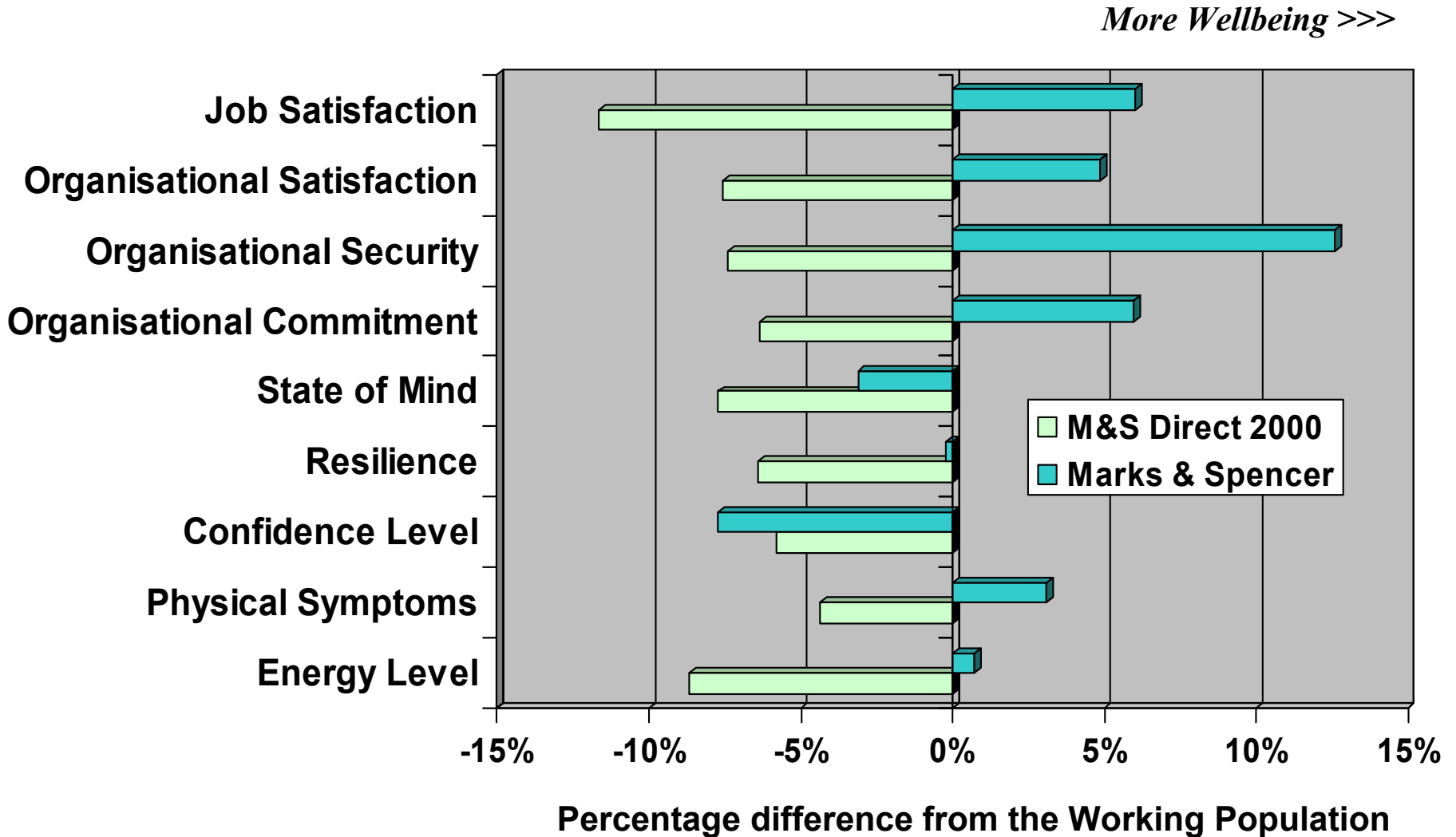
# M&S Current Pressures - Commercial



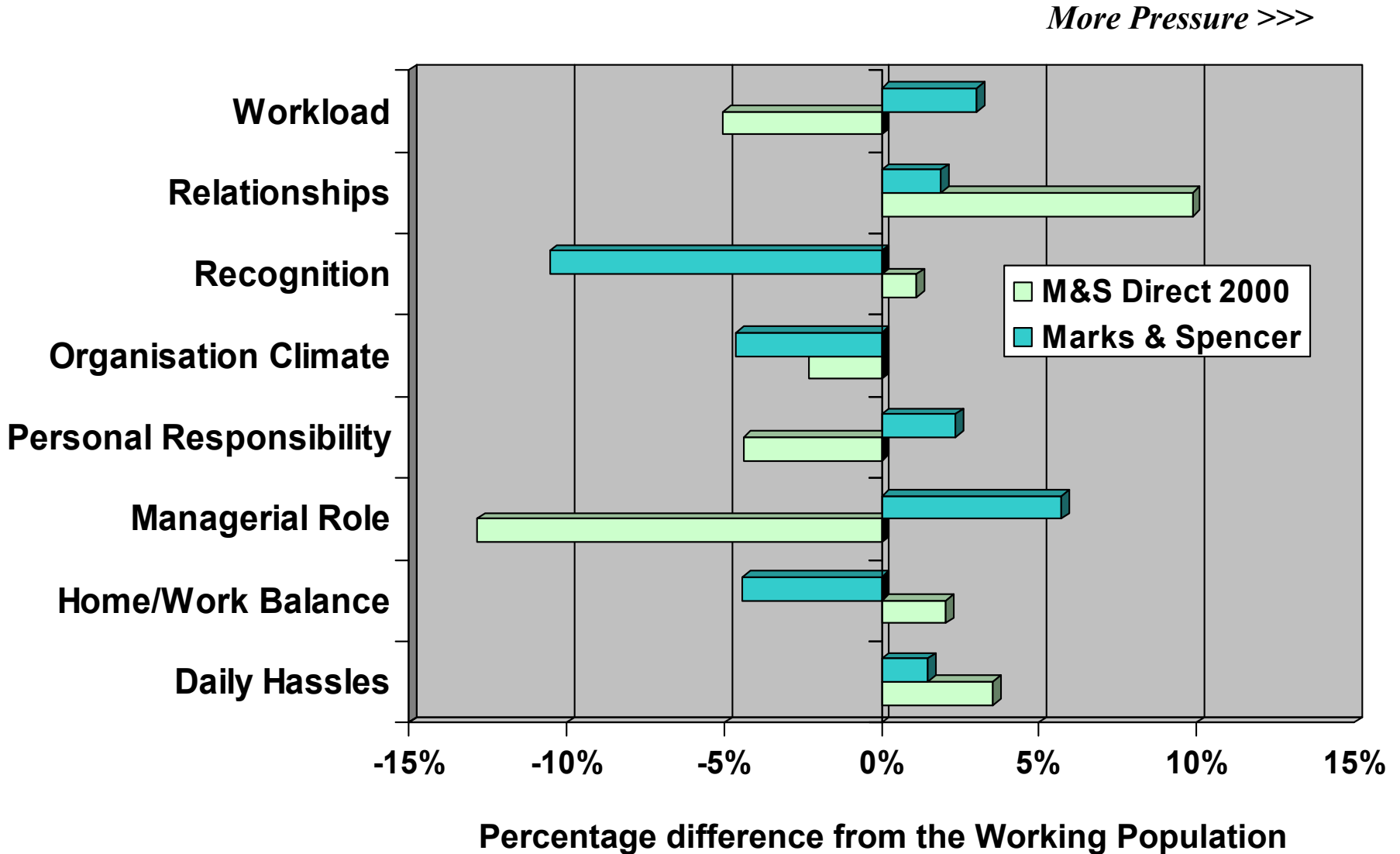
- ⇒ M&S “beleaguered” - media attention
- ⇒ Recovery & Renewal - Time lag
- ⇒ 1998 onwards; significant organisational change
- ⇒ Increased Pressure & Turnover = Casualties
- ⇒ PMI Survey Comparison; 1998/ Direct
- ⇒ Increased OH focus on Mental Health issues



# PMI Survey Comparison 1998/ Direct – Effects of Stress



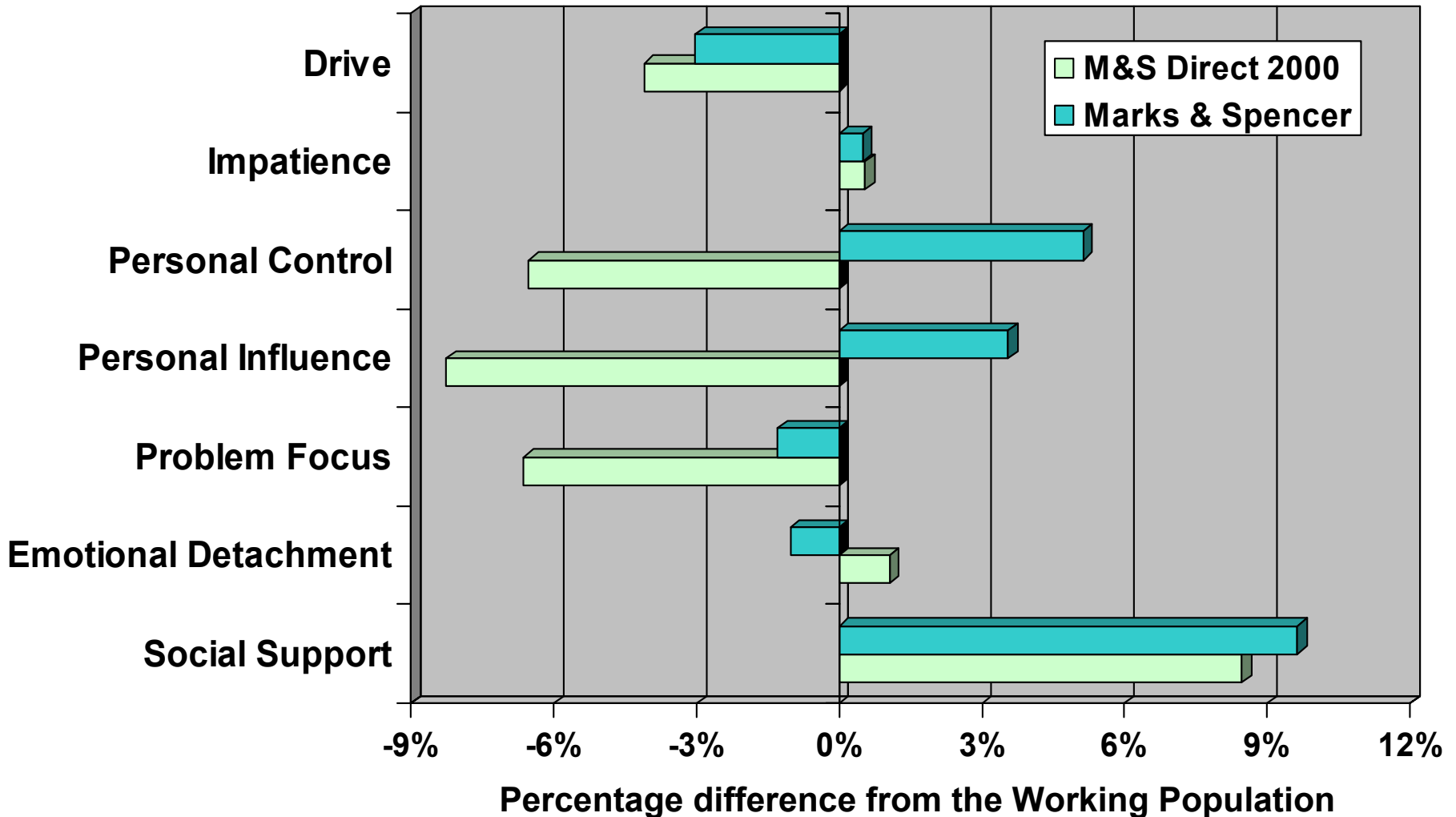
# PMI Survey Comparison 1998/ Direct – Sources of Pressure



# PMI Survey Comparison 1998/ Direct –Individual Differences

*More Drive / Impatience >>>*

*More Influence / Coping >>>*



# Mental Health Strategy



- ⇒ **OH Service - Treat casualties**
- ⇒ **Targeted SMI Programmes - Section Managers (2,500)**
- ⇒ **Analyse causes of Stress from PMI**
- ⇒ **Influence HR/ Organisational change**
- ⇒ **Audit Occupational casualties (OHTRA)**
- ⇒ **Develop “short” survey (Risk Appraisal)**
- ⇒ **Need to understand and manage the causes of Stress, not just treat the symptoms**

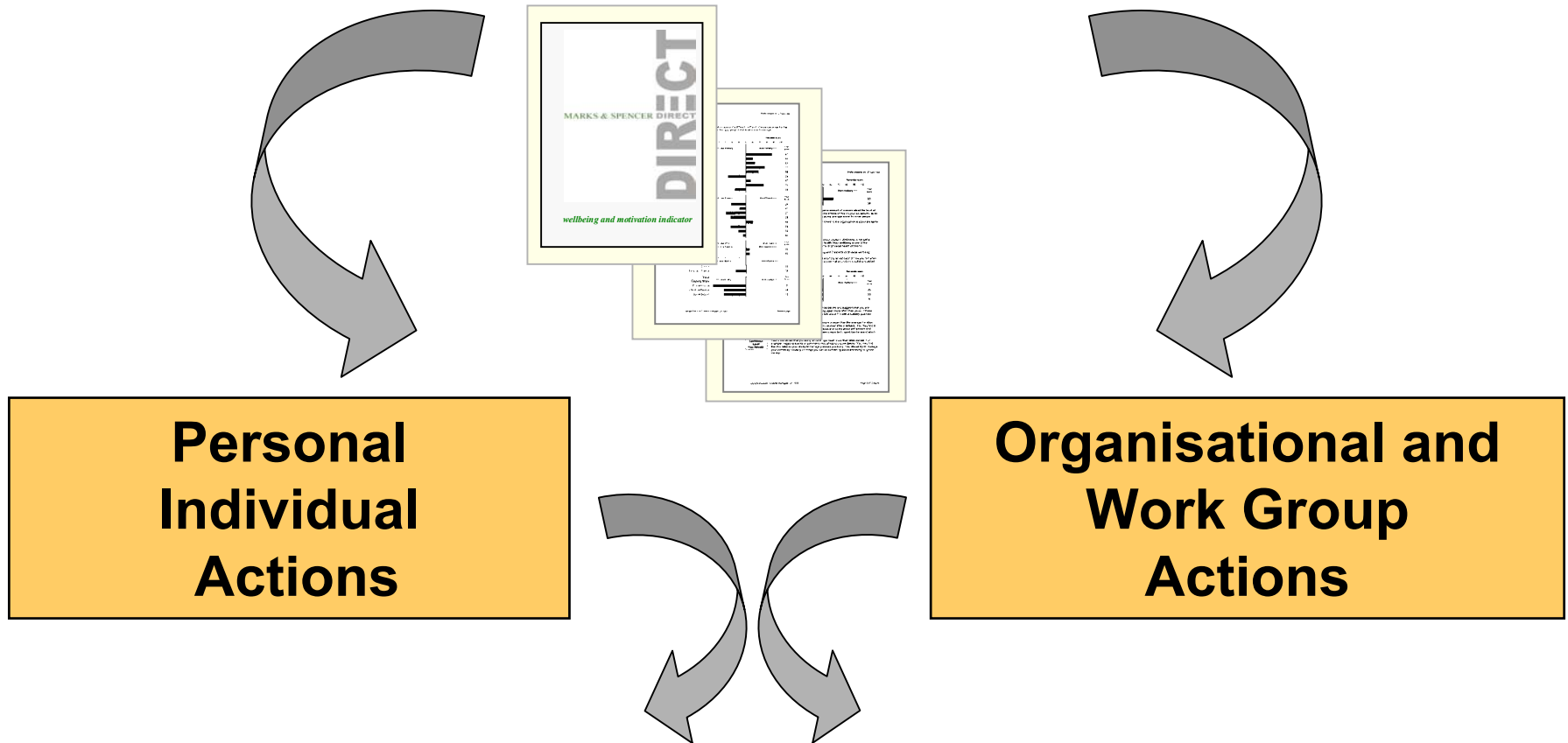
# “Motivation & Wellbeing”



- ⇒ Targeted SMI - Section Managers
- ⇒ Delivered by OH Advisors - Modular Course
- ⇒ PMI provides individual insight/ action
- ⇒ PMI analysis to influence HR Management/  
Organisational change
- ⇒ Roll-out to other categories; Customer Service; Call Centres

# Combining individual and organisational actions

**Different reports drive different actions**



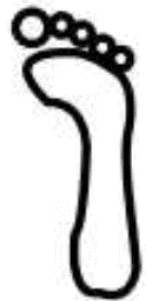
**Combined actions result in more benefit**

# Summary & Conclusions



- ⇒ **OH Mental Health interventions to improve productivity and commercial performance**
- ⇒ **Solid and well provided OH platform**
- ⇒ **Targeted SMI to build “resilience” and to influence HR/ Organisational change**
- ⇒ **On-going audit and review**
- ⇒ **Health Promotion to improve Work/Life balance**

Find the smallest  
steps that make  
the biggest  
difference



MARKS &  
SPENCER