



RETENTION

9 step plan to keep
your people happy,
motivated and
engaged

OVERVIEW

Retaining people in the workforce is key to long term performance, efficiency and profitability. In the current economic and demographic environment the demand for people is at an all-time high, with major gaps between available talent and demand in most key industries.

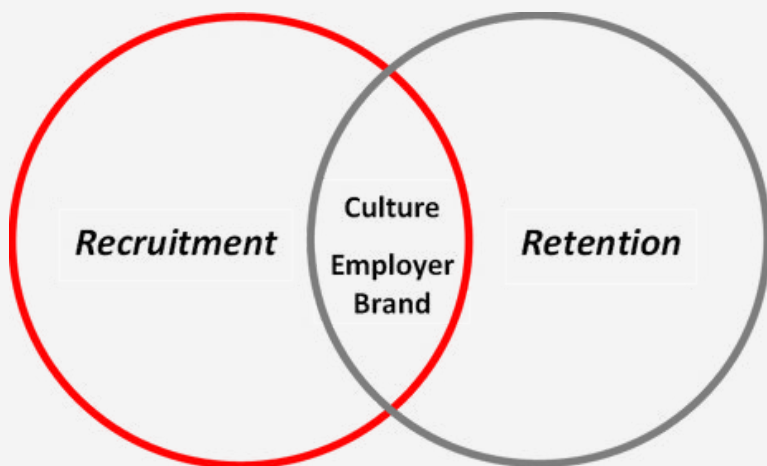
This means that anyone any good at their job is being besieged with offers and opportunities to leave their current role and go elsewhere. These offers often include pay increases and various benefits.

Of course you can accept this, and just agree to keep a constant hiring process in place, but this is costly, time consuming, destroys internal efficiency and grossly undermines internal culture and morale. The alternative is to retain the people you have. You'll never be 100% successful, and in fact you probably wouldn't want to be, as a degree of turnover is good; fresh blood brings new ideas. Too much, however, is always going to be bad.

Your people are in demand. Some turnover is positive as new people bring fresh ideas, but losing people you really want to keep should be avoided if you can.

HOLD ON TO YOUR WORKFORCE BY FOCUSING ON POSITIVE RETENTION, CREATING AND IMPLEMENTING EFFECTIVE, LONG TERM STRATEGIES THAT SUPPORT DEVELOPMENT AND GROWTH.

Recruitment and retention overlap, contributing to a great company culture



RETENTION PROJECT COMPONENTS

There are nine elements that contribute to creating a strong, well-managed culture which in turn supports retention of a positive and dedicated workforce.



01 CULTURE

Assessing the culture of an organisation, both top down and ground up. Finding alignment and developing a consistent culture plan that emphasises strengths and develops the culture against the company values.

- Culture audit & report
- Culture development programme
- Communication strategies
- Reward and recognition review

02 MANAGEMENT SKILLS

Creating consistent, aligned, high-touch management, using a set of common practices focussed on engaging staff and providing high quality management where people feel safe.

- Board assessment
- Exec coaching / mentoring
- Management assessment
- Management training

03 MOTIVATION & ENGAGEMENT

Identifying what motivates staff, as a group and as individuals, and ensuring that management maximises engagement.

- Motivation assessment
- Utrecht Engagement Scale
- Management for Motivation training
- Engagement strategy

04 TRAINING & DEVELOPMENT

According to a Digit survey, 40% of staff feel that they do not have the training to do their role properly, 25% feel incapable of performing their role, over half had had no training in the last year, and over 30% would not apply for a role that does not offer established training and development.

- Skills and culture matrix and analysis
- Training plans
- Coaching
- PDP development and implementation

05 **EVP / EMPLOYER BRANDING**

Looking at how your company is viewed by employees and prospective employees, determining how to better represent or reposition your company's true values

- Internal analysis
- Brand assessment
- Website review
- Social media review
- Brand positioning

06 **ENVIRONMENTAL AND SOCIAL GOVERNANCE (ESG)**

ESG comprises a variety of issues related to how an organisation is presented and seen, and has an enormous value for both recruitment and retention. It also strongly influences culture and brand. Elements include diversity, environmental credentials, sustainability, human rights, investment strategies, community relations.

- Diversity advice
- Sustainability and environmental review
- Employee rights review
- HR policy review
- Support with certification, for example B-Corp

07 **WELLBEING**

Ensuring the health and welfare of employees, including physical, mental and social health.

- Wellbeing review
- Mental Health first Aid
- Mental Health support

08 **THE BASICS**

Elements that are taken for granted, but are demotivators in their absence and therefore essential to retention.

- Working conditions
- Policies
- Salary
- Flexible working
- Benefits

09 **DATA**

Tracking, measuring and analysing data ensures continuous improvement.

- Reasons for leaving
- Happiness survey
- Ongoing culture healthchecks
- Internal reference groups

METHODOLOGY



Each element is broken down into specific deliverables, which join together as a flow of projects carried out in concert with your primary stakeholders.

The early stages are heavily focussed on data gathering, analysis and reports, which inform next steps and priorities,



Is it articulated, understood and aligned/embodied?

Includes values, company statement, communication, employee feedback, recognition/reward, exit interview data, Glassdoor

Comprises Analysis, Definition, Communications Plan and Roadmap

Culture Analysis

Gather data on culture, review what is already in place and work to define culture goals and definitions.

- An employee survey including detailed questions on culture, values, motivations etc. The Quarsh Employee Engagement survey is a good example
- Identification and interviewing of people who are felt to be 'ideal' staff culturally to gather specific ideas and information on current and target culture
- Meetings with HR and executive stakeholders to look at and define ideal culture, targets
- Collation of gathered opinions and data to identify current cultural position, target culture and Gap analysis

Outputs

- Culture audit and report
- Target culture definition
- Gap analysis

Culture Definition

Taking the information from the previous phase, does the culture meet the desires and needs of the organisation? If so reinforce it; if not, seek to change. Put together a culture team involving people within the business who represent the target culture, guided and supported by specialists. Their goal should be to:

- Develop and define company goals, or to approve those already in place
- Approve or develop values statements
- Create an appropriate and effective organisational mission statement
- Appoint people as culture champions for the organisation. These may or may not be members of the team

All messaging, whether values, goals or mission statement, must be clear, easy to understand and relate to and provide meaning and purpose.

Culture Communications Plan

Develop a communication programme, not only for the short term, but for the long term development and reinforcement of the culture.

- Using the culture champions as examples and thought leaders
- Define language and approach, including making all communication positive
- Develop a communications programme including leadership briefings, two way channels, open house meetings, newsletters, website, social media etc
- Develop a launch strategy and deliver the new approach in such a way to gain positive support and feedback from the staff
- Train all managers and content producers in positive communication and developing the culture
- Undertake an audit and editing sweep to ensure all media, including both internal and external, reflects the new culture values and language
- Develop a culture video celebrating what is great about the organisation for use online in careers pages and in orientation

Outputs

- Culture team development
- Organisational values and goals
- Mission statement
- Culture champions programme

Outputs

- Communications format
- Culture launch
- Reviewed documentation, website, social media
- Communications training
- Culture collateral: blogs, videos etc

Culture Roadmap

Creation and maintenance of a successful culture requires regular and ongoing activities and policies that support and reinforce the cultural ideal. This is best achieved through the creation and implementation of a culture roadmap or plan incorporating appropriate policies and events. These can include:

- Awards and recognition for the right behaviours
- Supporting employee wellness – company supported sport/yoga/meditation, offering mental health counselling, review workspaces
- Team-building activities
- Promoting autonomy and flexibility
- Offering volunteering time
- Offering perks
- Promoting diversity
- Activities – duvet days, happy hour Fridays, picnics, quizzes, competitions, innovation Mondays, dress up/dress down days, theme days
- Training and development support

Outputs

- Detailed culture plan
- Calendar of activities
- Policies and procedures
- Activities
- Recognition strategy



Management Skills

Are managers delivering effectively whilst enabling and reinforcing the company culture?

Comprises: Employee survey, PDPs, board/management assessment, management skills matrix

The effectiveness, consistency and approach of management is absolutely vital to the success of an organisation, most particularly from a cultural perspective. Management is where leadership meets the staff, and so where the cultural influence is most clearly felt.

One of the most effective ways to **ensure positive and consistent culture** is to ensure all management are familiar with and typically use the same approaches, processes and styles.

This is most effectively done by **training all managers in the same approaches and tools**. This also brings all management up to the same high standard. This should be supplemented by **individualised mentoring** to identify specific weaknesses and areas for improvement. By commencing mentoring prior to the training programme implementation, the **training can also be focussed and emphasised towards individual issues** to optimise results.

QUARSH RETENTION PROGRAMME

- Preliminary assessment mentor sessions with all managers
- Standard management training for all managers covering topics such as:
 - Management styles
 - Delegation
 - Effective communication
 - Situational leadership
 - Motivating and optimising
 - Performance management
 - Providing feedback
 - Coaching and development
 - Conflict resolution
- Ongoing individual mentoring

Outputs

- Management review
- Management and leadership training
- Internal coaching programme
- Management mentoring programme

Motivation & Engagement

Are people motivated and engaged? What will make them more so?

Business strategy alignment with individual goals, employee survey, motivation assessment, Utrecht Engagement Scale, exit interview data, Glassdoor

People perform at their best if they are motivated, engaged and supportive of the company. It is therefore vital to assess the existing level of motivation and engagement in the organisation, identify issues and gaps and look to increase in improve these factors.

- Review the current state of motivation and engagement
- Review any processes and programmes designed to improve the same and assess their effectiveness
- Identify key motivators within the workforce
- Identify demotivating factors and behaviours
- Develop targeted programmes to maintain and improve motivation
- Train managers and other key staff in motivational techniques
- Develop an effective engagement strategy

Outputs

- Motivation and engagement survey
- Motivation matrix
- Managing for motivation training
- Engagement strategy
- Reward and recognition programme

QUARSH RETENTION PROGRAMME

Training & Development

Are people trained and equipped to do their jobs effectively? What more do they want or need now and for the future?

Employee feedback, career paths/ladders, PDPs, training plans, skills matrixes

One of the most sought-after values for employees is career development, so having, maintaining and managing an effective and responsive PDP programme for staff, combined with relevant and compelling training opportunities is critical. There should be clear visibility for all staff as to how their careers can develop and what they need to do to achieve it, including:

- Establish development paths for all careers
- Effective PDP programme focussed on development, not review: "Forward focus"
- Ongoing PDP review process for management and staff
- Long, medium and short term development targets
- Training and development programmes for established career routes and alternate training sources for other paths

Outputs

- Training & Development review
- Career paths/ladders
- PDP review calendar/process
- Development target format
- Training plans
- Coaching and mentoring programmes

EVP / Employer Brand

Is this somewhere people want to work?

Employee feedback, website, careers page, social media, Glassdoor, recruitment advertising, internal communications

Key to developing and maintaining a culture are the people who are hired; not only what they are like when they join, but also the image they see of the organisation from the outside, what they find when they start and how they are onboarded. This includes:

- Employee Value Proposition (EVP)
- Employer Brand
- Hiring for culture
- Onboarding
- Culture initiation

Outputs

- EVP review
- Employer Brand assessment
- Brand positioning
- Website/Social media review
- Online/Social media plan
- Onboarding programme

QUARSH RETENTION PROGRAMME



ESG

Is there a clear Environmental, Social and Governance position aligned to your culture, and is it effectively realised?

ESG policies, diversity policy, environmental policy, employee rights, HR policy and handbook

Environmental, Social and Governance issues are increasingly seen as highly important to employees and prospective employees.

Having a clear ESG position and policies is seen as highly attractive and aligned to many people's personal values. A review of your ESG position, establishment of one aligned to your wider values and promotion of the same, potentially including appropriate recognition and certification is the heart of such a programme.

Outputs

- ESG review
- ESG policy development
- ESG champions
- ESG calendar and activities
- Positioning for certification, e.g. B-Corp



Wellbeing

Are people okay, and do they feel that they are or will be supported if they're not?

Employee survey, sickness and mental health policies, related communications, sickness data

Often the first element to be considered when a business seeks to improve its retention, in reality Wellbeing is just one part of a broad retention strategy. Nevertheless, it is crucial to get right, and highly visible if it is lacking.

- Wellbeing policies and awareness
- Mental Health
- Internal Communications
- Signposting
- Encouraging cross-function collaboration and interaction

Outputs

- Wellbeing Champions and Ambassadors
- Mental Health First Aid training
- Mental Health Support
- Wellness programmes
- Group activities supporting good physical and mental health

QUARSH RETENTION PROGRAMME

The Basics

Are the basic employment elements at an adequate standard?

Employee surveys, working conditions, policies, salaries, flexible working, benefits, office location and conditions

The basic elements of working in a company that many people take for granted are not necessarily highly motivating, but are demotivating if they are not at least competitive or are neglected.

- Working conditions
- HR policies
- H&S policies
- Employment rights/contracts
- Working hours
- Time off/vacations
- Salaries and benefits
- Flexible working
- Office location and layout
- Travel

Outputs

- Employee survey
- Policies review
- Working conditions review
- Salary review
- Benefits review
- Flexible working review
- Workplace review
- Travel/commuting survey

Data

What do you need to track and what does it show?

Retention figures, resigned vs fired, how long in post, exit interviews, reviews, demographics, trend analysis

Any programme needs to be measured to ascertain success. It is vital that a process of measurement and continual evaluation is put in place to track deliverables and targets.

- Definition of targets and goals for managers and departments
- Measurement of success
- Development of KPIs
- Rewards/celebration of success
- Measurement of employee engagement and satisfaction
- Review process
- Continual development and improvement

Outputs

- Targets for managers/departments
- KPIs
- Employee engagement/satisfaction surveys
- Culture review process and calendar
- Onboarding 3 and 6 month feedback
- Weekly 'pulse' feedback

Summary

This programme has been developed to give you a competitive edge. Taking all best practice and current thinking into consideration, our experienced team of specialists in HR, recruitment and training have developed a programme that you can execute with your leadership team and internal stakeholders to create a **systemically nourishing environment** which nourishes and supports the people you want to keep.

You will also **reduce the likelihood of people leaving at this critical time.** Cost savings are significant and not simply about recruitment costs. Factors include reducing disruption, management overhead, onboarding time, opportunity cost of an empty seat and core recruitment costs associated with agency fees.

Need help?

Our team at Quarsh would love to get involved! We can help with any aspect of this programme, from defining your initial survey to rolling out systemic changes.

Contact Lucy James, Managing Director, for a confidential chat, or visit our website for more information.



About the author

Lucy James is Managing Director of Quarsh Ltd, the **Complete Recruitment Department for SMEs.** Our mission is to help SMEs recruit better, giving a highly effective, cost-efficient alternative to DIY and agencies.

We would love to help you to gain an unfair advantage.

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For more information, visit www.quarsh.com