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Beyond Retention

Rali™ | BevK &Co.

A big thank you to everyone that registered and was able to join our discussion about engagement and retention on November 13th. It was wonderful to see the diversity of people and organizations seeking to make an impact in this area. Rather than being a "one-off" discussion, we would love to create the opportunity for a series of conversations and build ourselves into a community of practice. If you share this interest, please let us know!

The setup for the conversation was as follows. A few short years after Covid, the unemployment rate is near a historical low, employees are choosing to stay put, companies are demanding that workers come back to the office, and one in six retirees are going back to work. The question is "how important is a focus on engagement and retention NOW?"

The group responded to the following poll questions with the corresponding results.

> **How is your leadership thinking about engagement and retention NOW?**
> - We can worry about this less now. **(12%)**
> - We can stay the course on what we have been doing – no huge change is needed. **(12%)**
> - We need to improve aspects of what we are doing with an emphasis on specific populations. **(62%)**
> - We are trending in the wrong direction and need to make more holistic or systemic changes. **(12%)**

These results indicate that most of your organizations are still focused on engagement and retention but are targeting their efforts in specific areas of need.

When you registered for the event, we asked you to share your top engagement and retention challenges and questions, and you did not disappoint. Below are the six major themes that emerged from your responses. During our session we polled the group to establish the priority order.

Leadership and Manager Engagement
- Getting senior leadership buy-in to support HR, engagement, and retention.
- Managers' involvement in maintaining employee engagement post-training.
- Struggles with helping supervisors understand and embrace their role in employee engagement.

Remote and Hybrid Workforce Challenges
- Retaining a fully remote, global workforce and keeping remote employees engaged.
- Balancing preferences for remote work, hybrid models, and the push for return-to-office (RTO).
- Managing engagement and retention under different working arrangements (WFH, hybrid, in-office).

Budget Constraints and Retention Tactics
- Finding effective engagement and retention practices on limited budgets, especially in the public sector.
- Strategies for increasing retention and motivation in cash-constrained environments.

Retention of Diverse Employee Groups

- Addressing the engagement and retention needs of different generations, especially younger employees and seasoned staff.
- Making experienced employees feel valued and fairly compensated when tasked with training new hires.
- Retaining entry-level positions and incentivizing low-performing employees.

Cultural and Ethical Factors

- Navigating cultural shifts and turnover, especially post-COVID.
- Building ethical and inclusive workplace cultures to support retention.

Measuring and Demonstrating ROI

- Identifying and tracking ROI metrics for engagement and retention initiatives.
- Understanding evidence-based strategies, including wellness programs, that positively impact retention.

As part of the discussion, Bev and Larry provided their perspective on insights and actions for the topics prioritized by the group. In addition, the group was invited to share its perspective on each topic. Given the time limitations, we had more in-depth conversations on the top 3 topics. The information that follows covers these topics as well as insights and ideas from Bev and Larry on the topics that were not covered in the group discussion.

1. Budget Constraints and Retention Tactics

Many organizations are dealing with budget pressure in both free cash and people resources. At the same time, organization expectations remain high in terms of productivity. The good news is engagement and retention tactics do not need to cost enormous amounts of money because the actions that matter largely involve leader, manager, team member, and peer behavior.

Bev and Larry Insights and Ideas

Recognition Rules. Engagement surveys continue to show that "being valued and appreciated" is among the top employee engagement factors. Personal, meaningful recognition is essentially a no cost, high impact strategy. The key to success is making sure the recognition provided is specific, timely, and that it articulates the impact of employee actions on key stakeholders.

Clarify WHY. For many employees, their engagement factor is impacted by how included they feel in the rationale and process of decision making. Especially the ones that impact them. Leaders and managers can simply recognize this need and be sure to share the "WHY" behind decisions and include the voice of the employee as step in the decision-making process.

Flexible Options. Many organizations are experiencing a tug-of-war between work from home and return to office. What's emerging is the move toward finding a middle ground. A whole new industry is being created where workspaces are being reimagined to support team connection and collaboration to support hybrid work. The larger point is the idea of developing flexible work arrangements whenever possible.

Form Communities. Have you ever had a great conversation with someone in the same field as you? Did you want more of this type of interaction? One powerful engagement tool that is budget friendly is forming "Communities of Practice" (CoPs). With some simple facilitation, a web meeting tool and discussion forum you can get a community up running. The key is to help the community decide what topics are most important to them, and then help them bring the discussion to life. CoPs provide many benefits to the individuals involved and the organization, especially for those employees that have a keen interest in evolving the state of the art in their field.

Share Stories. The truth is that most of the engagement and retention work managers are doing is invisible to the organization. It happens, or doesn't happen, in the moments of interaction with employees every single day. Getting managers and employees to share their engagement stories makes the invisible visible, drives group learning, and motivates people not doing as much, to do more.

Focus on Career Development. The opportunity for career development is another key factor in employee's decision to engage and stay with an organization. Having managers build the skills and prioritize these conversations sends a strong message to employees that the organization is interested in their longer-term success. Bev's landmark book "Up Is not the only way" is an excellent resource for any organization. *https://bevkaye.com/bkbooks/upisnotheonlyway-abfsc-8fky5*

Get Specific. At the end of the day, there is no substitute for managers knowing the specific engagement and retention factors for each other employees. As we all know, finding out during an exit interview that something was missing that would have retained a valuable person is sobering. Making "Stay Interviews" and implementing the ideas surfaced as a consistent management practice can transform manager – employee relationships in significant ways.

Wisdom from the Community
Ideas from the group chat and discussion.

- Connect employees to the purpose of the company. Having managers help employees connect the dots on the bigger purpose drives higher levels of meaning and creativity.

- Use the term "Engagement Interview" as way to express the intent for these types of conversations.

- Use a recognition platform to connect great work to tangible rewards.

- Introduce peer coaching. You can also combine peer coaching with community building to amplify the benefit.

- Use community service to bring people together and experience contribution to a cause bigger than themselves.

2. Leadership and Manager Engagement

Leadership sponsorship and manager engagement in the day-to-day activities that drive employee engagement and retention are key to your success.

Bev and Larry Insights and Ideas

Senior Leader DIY. One of the best ways to get leadership buy-in and sponsorship is to have senior leaders hold stay conversations with their direct reports. When these leaders experience the process themselves and perceive positive benefits, they become more aware of retention as a topic in general and are more likely to actively sponsor this and other practices across the company. It is very important that you equip senior leaders with the knowledge and tools required to have open and honest conversations with their direct reports.

Engage and Retain CoP. At the manager and supervisor level, bringing people together to talk about what they are doing, what's working, and what to avoid, is a powerful way to drive up the manager engagement factor, and develop their skills at the same time. As we discussed earlier, it's like creating a Community of Practice for managers and supervisors on the topic of engagement and retention. The more these practices are being role modeled and expected across your management structure, the more it gets embedded in the fabric of your culture.

Benchmarked Goals. For some leaders, a more structured, measurement approach is needed, and this is where benchmarking comes in. By benchmarking your engagement and retention levels against your industry norms you can see how you stack up and determine a strategy with success measures specific to your company. Having an improvement target is an important motivator for many leaders. We will discuss "ROI" or "Impact" more fully in the next section; however, it is safe to say that many leaders require some sense of impact for the money, resources, or time spent on engagement and retention activities.

Embed in Talent Management. Including engagement and retention discussions in your leadership and management talent review process elevates awareness and drives action. Having leaders think through and share their retention risks, engagement issues, and potential actions goes a long way in creating sponsorship and accountability. Combining this data with "9-Box" and succession plan data gives you a power way of taking informed action.

Clarify Ownership. Always remember that employee engagement and retention are the primary responsibilities of line management and employees, not HR or Learning. The more you can provide structure, equip, coach, and hold others accountable, the more you will embed mindsets and behaviors into your culture.

Wisdom from the Community
Ideas from the group chat and discussion.

- **Hire or appoint a senior leader** into a "culture development" role such as Chief Employee Well Being Officer, Chief Culture Officer, Chief Employee Experience Officer, or similar.

- **In employee one-on-one conversations, use a quick "temperature check"** using a tool like this one. No matter where the employee places themselves, focus on why they feel the way they do without judgment, and work together on areas of potential change.

3. Measuring and Demonstrating ROI

Having both quantitative and qualitative ways of demonstrating a return on your effort is clearly very important. Let's discuss a few approaches you could consider.

Bev and Larry Insights and Ideas

Alignment Over Perfection. One important lesson is to land on an approach and data set through discussion with the leaders who are holding you accountable for results. Nothing is worse than collecting and sharing data that no one thinks is relevant or believable.

Use ROE Instead of ROI. Most organizations find using a strict "ROI" approach to be problematic. The work required to gather the investment side information and do factor analysis on the return side can cost more than the actual solution. An alternative is to use the idea of Return on Expectation (ROE). In this approach, you write out your hypothesis of what actions will be taken, what changes will be seen in the workplace, and what the impact of those changes will be. You can define impact items that align with the framework your company uses to reports its progress and results. Then, take your hypothesis and pressure test it with leaders you need to "buy-in" to the hypothesis until you are aligned.

Quantify Turnover. A tried-and-true approach is to track and quantify voluntary turnover rates. As we all know, attrition is expensive. Making a cost estimation visible as a companion to the attrition numbers can be compelling. You can monitor and report overall turnover, voluntary vs. involuntary separations, and turnover within key talent groups. Reduced turnover following engagement initiatives is a direct indicator of the impact of these programs. Gallup estimated that turnover costs uo to 200% of an employee's annual salary.

Talk Risk to Plans. Mike Tyson famously said, "everyone has a plan until they get punched in the face." All leaders have goals and plans they are motivated to meet or exceed. Losing key employees is just like a punch in the

face that takes you off plan. A simple way to raise the awareness of impact is to use the concept of "risk to goals." Have leaders assess what would happen to their goal achievement in the face of low engagement and un-planned attrition. For some it can be a wake-up call.

Close the Loop. It sounds obvious, however it is critical that you have some way of closing the loop by tracking and reporting what actually happened with the programs and initiatives you implemented. Many organizations get caught in the trap of incomplete or too many implementations without the data about what worked and didn't. Build your credibility and provide a baseline for continuous improvement by closing the loop.

> **Wisdom from the Community**
> *Ideas from the group chat and discussion.*
> - **Hold a "development day"** where everyone walks out with a development plan and a way to track progress and impact.
> - **Trend your engagement data** over time regarding percentage of participation, engagement scores and leader index scores.
> - **Use newsletters** that showcase collaboratively achieved results.

Wait... There's More!

The following items were not covered in our session due to time limitations. Even so, we hope you find the following information useful.

4. Remote and Hybrid Workforce Challenges

According to Bev, return to the office brings 3 types of returnees:

1. "Returning with burning" - meaning they're excited about coming back but managers need to ask what they are burning to do.
2. "Returning with churning" - meaning they're not so sure they want to be back and are walking the line between the pros and the cons. They're waiting for managers to convince them that life will be different.
3. "Returning with yearning" - the important thing here is what are they yearning for.

Providing this simple framework as a conversation guide for managers can surface important and actionable insights regarding employee mindset.

Remote and Hybrid Workforce Ideas:

- Understand Employee Preferences
- Offer Flexibility and Compromise Where Possible
- Leverage Hybrid Models as a Middle Ground
- Focus on Outcomes, Not Presence
- Ensure Equity in Opportunities
- Support Well-being
- Evaluate and Adjust Regularly

5. Retention of Diverse Employee Groups

It can be very helpful to understand the engagement and retention needs across generations.
These needs are due to differences in values, career stages, and work expectations:

- **Gen Z (born ~1997-2012):** Technology and innovation, social responsibility, stability with Flexibility, and feedback and Recognition.
- **Millennials (born ~1981-1996):** Purpose and Impact, continuous Learning, collaboration, and work-life integration.
- **Gen X (born ~1965-1980):** Work-life balance, independence and flexibility, professional development, and pragmatism.
- **Baby Boomers (born ~1946-1964):** Loyalty and stability, recognition for hard work, career advancement, and teamwork.

Leaders of highly diverse teams must focus on developing both **healthy AND high performing teams** that recognize and leverage each persons' unique talents, work circumstance, and contributions to the team.

6. Cultural and Ethical Factors

Research by Vincent Brown and Janet Reid, Ph.D. uncovered the characteristics of "intrinsically inclusive" individuals and the behaviors they practice. Anyone can use these behaviors to create a culture of inclusion in their organization.

The four behaviors are:

1. Create Connected Understanding. Connected understanding is the ability to understand how people think, process information, and draw conclusions. Observing how we naturally process information, communicate, and make decisions will enable us to connect with others more easily.

2. Demonstrate Respectful Empathy. Empathy, not sympathy, is about putting yourself in someone else's situation in a way that enables you to honor their struggles and successes without judgement. This results in a higher level of respect for the individual as a person. When we take the time to learn and respect a colleague's back story, we build empathy and foster shared respect.

3. Build Shared Trust. Shared Trust creates an environment of honest and open conversations without fear of retribution. To build Shared Trust we must first understand what builds and breaks trust between people..

4. Foster Significant Emotional Relationships. Building Significant Emotional Relationships with someone different than ourselves is an effective practice to upend our patterned thinking. When we seek input and advice from a diverse group of individuals, we gain valuable perspectives and insights.

Here are a few more ideas to consider:

- Developing **Cultural Competence** both internally and with customer/patient facing interactions has enormous benefits to your organization.
- Using **Personality Profiling** will help leaders and employees recognize, flex, and include multiple styles of communication and problem solving.

Developing Talent Focused Leaders - Bev Kaye

Bev shared her thoughts and best practices on the four "clusters" of practices that Talent Focused Leaders do to engage and retain their people. To make these clusters easy to engage with, Bev broke them down into the 26 practices that align with the letters if of the alphabet. Think of them as the A to Z of engagement and retention. As you review the clusters and practices, consider a few questions:

- Which areas and practices are demonstrated the most in your own team and the larger organization.
- Which areas and practices are demonstrated the least in your own team and the larger organization.
- Which areas and practices most desired in your own team and the larger organization.

Bev Kaye and Rali Partnership

In her work with hundreds of organizations, Bev found that managers were looking for practical knowledge and tools they could use every day. Organizations were looking for a way to scale the Love 'Em or Lose 'Em content in a way that went beyond a workshop to drive behavior change creating a more sticky and sustainable solution. Through our partnership, team Bev Kaye and team Rali have co-developed a journey on the Rali Platform that brings the Love 'Em or Lose 'Em content to life in an interactive, engaging, and impactful cohort-based experience.

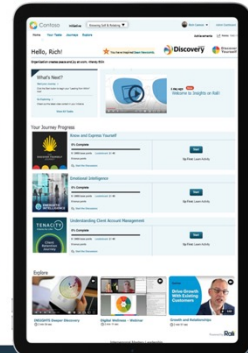## Rali is a Change Experience Platform (CxP')

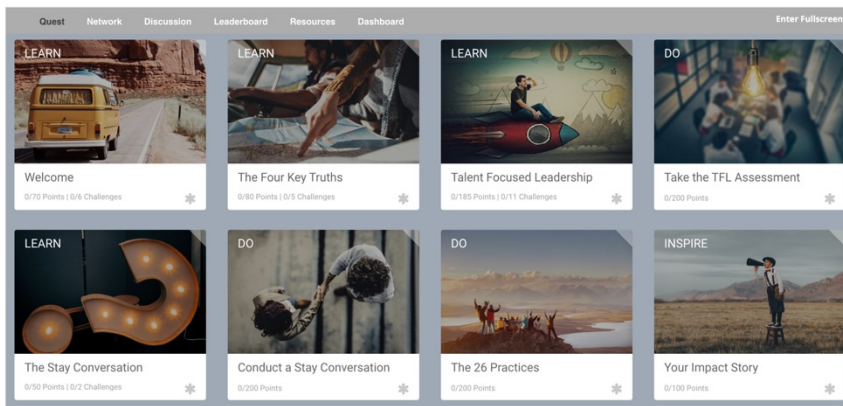that drives measurable, scalable, and lasting behavior change that shapes your culture and positively impacts your employee experience. Rali ensures successful outcomes by uniting technology, behavioral science, and change management best practices into a single unified experience. Driving true behavior adoption requires a team-based approach that powers short cycles of learning, practice, and sharing over time. To activate this process, content from leading experts in business-critical areas has been built into Rali's Learn | Do | Inspire journey framework. Each journey incorporates interactive discussions, coaching, accountability mechanisms, tracking, and AI-driven analytics that drive measurable engagement and impact.

The Love 'Em or Lose 'Em journey

on Rali features short **Learn Activities** which include videos from Bev, questions, and group discussions that build knowledge and shape mindsets. **Do Activities** convert concepts to on-the-job practice and are supported by "Learning Partners" that provide feedback and accountability. All 26 of Bev's A to Z practices are included in the journey. Inspire Activities amplify the group experience and achievement by enabling story sharing, appreciation, and encouragement between cohort members.

Larry Mohl
Founder & Chief Experience Officer, Rali

Larry Mohl is an experienced innovator and change management executive. Larry is an expert at driving change that disrupts and re-shapes deeply-rooted company cultures. In Chief Learning Officer positionsat Motorola Cellular and later American Express and Children's Healthcare of Atlanta, Larry saw an opportunity to create a new solution to the problems of driving successful change. Since 2016 Rali has been empowering companies to drive measurable, scalable, and lasing behavior change.

Dr. Beverly Kaye
CEO, Bev Kaye and Company

Dr. Beverly Kaye is a best-selling author, dynamic speaker and internationally recognized authority on career development, employee engagement and retention. Since her entrepreneurial debut as CEO of Career Systems International (CSI) forty years ago, Bev has used her incisive and inventive thinking to help organizations reduce the costs of talent loss and foster cultures of support. She has refreshed the thinking and behaviors of countless business leaders – as a guide on the side and sage on the stage.