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Coral Bay, Sunrise
St. John, U.S. Virgin Islands

CONDUCTING STAY INTERVIEWS

Retaining Star Performers with an
Engagement Conversation



With Jeff Russell
Co-Director

© 2016, Photograph by Jeff Russell

MY STREET CRED



- Jeffrey Russell, co-director of Russell Consulting, Inc. with his business and life partner Linda.
- We've been helping to build great organizations for the past 30 years
- Our focus is on leadership, strategy, change, and performance management
- Past president of GMA SHRM
- Presented at past WI SHRM state conferences in addition to Wisconsin SHRM chapters
- Author of nine books – most recently ***Fearless Performance Reviews*** (McGraw-Hill, 2014).

Quetico Lake, Canada

You never really understand a person until you consider things from his point of view, until you climb inside of his skin and walk around in it.

— Atticus Finch

To Kill a Mockingbird (1962)

by Harper Lee

OUR AGENDA

- The state of engagement in workplaces today
- What is and is not the Stay or Retention Interview
- Why conduct them
- Key questions to answer/issues to address
- Designing effective retention interviews
- Example stay interview questions

HOW ENGAGED ARE WE?

- **30% Highly Engaged** ←

Nearly everyone starts here in their career/job . . . And every day they make a decision to stay at this level or drift into a lower level of engagement.

- **52% Not Engaged** ←

An opportunity to build engagement or return someone to full engagement

- **18% Actively
*Dis*engaged** ←

May not be able to reach these employees! Too much history; too much attitude; too much . . .

From: Gallup

WHAT IS A STAY INTERVIEW?

Also called an **Engagement** or **Retention Interviews**.

A periodic one-on-one **structured** interview between a manager and an employee that:

- a) identifies and then reinforces the factors that **drive an employee to stay**
- b) explores ways that the organization can **better engage them** in their work
- c) identifies, seeks to understand, and explores **strategies to mitigate any “triggers”** that might cause an employee to consider leaving.

WHAT THEY ARE AND ARE NOT . . .

Stay Interviews ARE	Stay Interviews ARE NOT
<ul style="list-style-type: none">• A one-on-one conversation• Designed to build trust• About the employee• Structured conversations to collect data on the employee's experience, perceptions, and expectations• Scheduled periodically• Open, candid, collaborative conversations• Conducted by managers• To include a Stay or Retention Plan for ensuring that actions result from the conversations• About asking questions and deeply listening with an open heart and mind• Brief and focused: 20-30 minutes in length	<ul style="list-style-type: none">• Asking for "how's it going?" feedback at team meetings• Designed to just get answers (their focus is on insights/learning)• About the manager and the manager's ability/competence at leading or managing• Gathering data from casual discussions around the office• Conducted only when there is a problem• About pay and performance• Conducted by HR• A personal or professional development plan• About developmental and coaching needs• Long and spontaneous session focused on problems, frustrations, and challenges

WHY CONDUCT – FOR EMPLOYEE?

1. Strengthening **trust** with his/her manager.
2. Being **heard** and understood – having his/her manager deeply knowing the employee's expectations, aspirations, and challenges.
3. Helping clarify the employee's own **thinking** about his/her work and her/his future with the organization.
4. Exploring professional and leadership development **needs**.
5. Honoring – and the organization learning from – the employee's **experience**, expectations, and insights.
6. Identifying the **obstacles** to his/her engagement.
7. Strengthening the employee's sense of **self**-efficacy: *I am responsible for my own success here!*

WHY CONDUCT – FOR MANAGER/TEAM?

8. Identifying the reasons why an employee continues to work for and be committed to the team and organization.
9. Identifying the organization's assets/strengths (what the organization does well and how that benefits the employee's experience).
10. Identifying organizational vulnerabilities that may need to be addressed by the organization that may be creating problems for the employee.
11. Better understanding what in the work environment enables higher levels of employee engagement.
12. Identifying potential triggers that might cause the employee to make the “it's time for me to leave” decision.
13. Reducing the likelihood of employee separation/turnover.
14. Strengthening employee ownership for his/her own success.

WHY CONDUCT – FOR HR?

15. Enabling HR to **redesign** jobs and rewrite job descriptions to ensure a better fit to the needs of the employee and the organization. **[And also strengthen recruitment efforts.]**
16. Enabling HR to define the “**success** factors” of employee engagement and then to use that information for recruitment and selection.
17. Enabling HR to **adjust** HR policies and practices to support engagement and reduce turnover.

STAY ISSUES AND QUESTIONS

- All employees or a select few?
- Who conducts them?
- What's the right timing and frequency?
- Should employee participation be mandatory or voluntary?
- What to do with the results?
- What is HR's role and how should stay interviews drive HR policy/practice?

ALL EMPLOYEES OR A SELECT FEW?

Should they be done for all employees?
Just with star performers? Only with “at risk
of leaving” employees?

Recommendation: **You want all employees to be engaged so should be done for all. If managers need to prioritize, they may want to start with those at risk of leaving and star performers . . . and then move to others.**

WHO CONDUCTS?

Who should conduct them? The employee's supervisor, a neutral supervisor or manager, HR, or an objective third-party?

Recommendation: This is really the exclusive work of the supervisor or manager. It's about creating understanding and building a relationship to maximize engagement.

BEST TIMING AND FREQUENCY?

When are they best done? Soon after hire? Anniversary date? During the performance review? And how often should they be done?

Recommendation: The first interview should occur soon after hire. After this, at least annually (anniversary date?) and more frequently depending upon internal and external factors/forces.

MANDATORY OR VOLUNTARY?

Should we require people to participate?
What if they say “no?”

Recommendation: This shouldn't be about mandatory or voluntary . . . it should simply be an at least annual conversation with each employee about how things are going. If the employee says “no” to the interview, it actually increase the need to have one!

WHAT TO DO WITH THE RESULTS?

What's the best way to ensure action? Who is responsible for taking action? Where does accountability lie?

Recommendation: An “engagement or retention plan” should emerge from this interview that identifies what the manager and employee will do to enable ongoing employee engagement. Ideally, the employee leads the development of this plan – but the supervisor needs to ensure that it's developed.

WHAT IS HR'S ROLE?

What is HR's role in stay or engagement interviews? How will HR receive data from the interviews to enable action? How can/will HR leverage Stay Interview results into effective HR policy and practice?

Recommendation: HR should (1) lead the development of a universal stay interview program, (2) define expectations, (3) develop model questions, (4) orient/train both supervisors and employees on the process/expectations, (5) collect employee stay plans, (6) periodically meet with supervisors and managers to discuss results, and (7) adjust HR policies where/when needed based upon the emerging stay interview data/discussions.

DESIGNING YOUR STAY INTERVIEW PROGRAM . . .

Step One – Define Your Goals, Policy, and Practice

- What is your purpose?
- Define the “**value proposition**” (why it’s worth the effort and time)
- Decide on who you will target: All employees? At risk? Star performers? Will you need to prioritize?
- Voluntary or mandatory?
- What’s the desired frequency?
- Standardized or freewheeling approach?
- HR’s role

DESIGNING YOUR STAY INTERVIEW PROGRAM . . .

Step Two – **Develop Your Questions**

- What questions will you include in the interview?
- Can managers add/subtract questions on their own? [**The answer should be YES – as long as all standardized questions are asked.**]
- How many questions should be asked and how long is each interview expected to last?

Note: the “interview” should be more conversational than formulaic . . . with the manager making informal notes during or after the interview

DESIGNING YOUR STAY INTERVIEW PROGRAM . . .

Step Three – **Set Expectations & Train All**

- Train all employees (leaders, managers, and employees) in the process, **why** we're implementing Stay Interviews, and their **role** within the process.
- Develop a **Stay Interview Toolkit** for managers and employees.
- Provide managers and employees with the questions in advance of the interviews and any forms that have been developed to capture the data.

DESIGNING YOUR STAY INTERVIEW PROGRAM . . .

Step Four – **Ensure Development of Retention Plans**

- Ask each manager and employee to mutually develop a Stay Plan.
- The Stay or Retention Plan should include:
 1. **No more than three initiatives to facilitate the employee's engagement/retention.**
 2. **Actions the manager will take to support each initiative.**
 3. **Actions the employee will take to support each initiative.**
 4. **Dates for accomplishing each initiative and interim dates toward completion of each.**
 5. **Everything should be in writing with copies held by the manager and the employee (copy to HR?).**

DESIGNING YOUR STAY INTERVIEW PROGRAM . . .

Step Five – **Refine HR Practices and Policies**

- How will HR receive results from the Stay Interviews?
 - ❑ Collecting copies of Stay/Retention Plans?
 - ❑ Conducting focus groups or meetings with managers who have completed interviews?
 - ❑ Gathering quantitative data (10-point scale questions)?
- Identifying trends and patterns in the data and potential implications for HR and company practice.
- **Gathering additional data** other than through the Stay Interviews to validate, confirm, amplify, or suggest alternative interpretations of the Stay Interview results.
- **Discussing results, implications, and suggested changes in HR and company policy and practice with company leadership.**



Kylemore Abbey
Connemara, County Galway

Each morning when I open my eyes I say
to myself: I, not events, have the power to
make me happy or unhappy today..

— Groucho Marx

American Comedian

b. Oct 2, 1890 - Aug 19, 1977

EXAMPLE STAY INTERVIEW QUESTIONS

Stay/Engagement Interview Questions

1. What do you value most about working here?
2. What brings you joy and inspiration at work? What aspects of the job that you do for us bring out the best in you?
 - a. When you arrive at work each day, what do you most look forward to?
 - b. Is there a way to structure the job such that more of this happens more often?
 - c. What actions could you take to continue bringing out your best work?
 - d. What can I do to support this in bringing out your best?
3. To what extent are you currently doing "the best work of your life" on this 10-point scale: 1 = never/not at all to 10 = always/to the greatest possible extent? What are the factors that, if they were more present, would contribute to you moving your rating to a 10?
4. To what extent do you feel that your work makes a difference in the company and that it has a noticeable impact on customers on this 10-point scale: 1 = never/not at all to 10 = always/to the greatest possible extent? Please explain your response. To what extent is this important to you?
5. To what extent do you feel "fully utilized" in your current role? If so, can you identify the factors that make you feel fully utilized on this 10-point scale: 1 = never/not at all to 10 = always/to the greatest possible extent? Are there additional things that we as an organization or that you could do to more fully take advantage of your talents and interests?
6. What stresses you? What aspects of the job that you do for us do you find the most stressful?
 - a. Is there a way to structure the job such that these stressful parts can be reduced or eliminated?
 - b. What actions could you take to reduce/eliminate these stressors?
 - c. What can I do to reduce these stressful job elements?
7. If you were to suggest one change to your work or the work environment here that, if this was implemented, would enhance your level of engagement, what would that change be?
8. What are your short- and long-term development goals?
 - a. What career future do you see for yourself here?
 - b. What skills and knowledge do you see yourself developing or strengthening over the next several years?
 - c. What actions do you see yourself taking to help you move toward these development goals?


- d. How can I best help you achieve your development goals?
9. Imagine that it's five years from now. Where do you see yourself working, what role are you playing, and what is the work you are doing?
10. What are you learning here? Is there anything else that you'd like to learn here but haven't had a chance to do so? How do you learn best? (By doing, reading, observing, attending workshops, etc.)
11. Describe your view of the team-based work environment here. Is it collaborative, competitive, supportive, conflictual, empowering, confusing, rewarding, blaming, synergistic, etc.? Which words best capture the team work environment? Explain your response.
 - a. What is one thing that you could do to strengthen the team environment here?
 - b. What is one thing that I could do to strengthen the team environment here?
12. Which of these following internal "drivers" to your motivation and engagement are most important to you? If all are important to you, which is most important?
 - a. **Autonomy** – being able to work independently; being trusted to work in the way that I wish
 - b. **Mastery** – feeling as though I am advancing in my job, career, profession, and life; feeling as though I am learning and improving every day
 - c. **Meaning/Purpose** – feeling that what I do matters; that my work makes a positive difference in the world
13. If something were to happen in your job or if you were presented with a job opportunity outside of the organization – either of which might give you a reason to consider leaving us – what might that reason be?
14. Is there anything else that you could tell me that, if I knew this, would help me better understand what brings out your best performance and better understand how I can be helpful in supporting you?



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FINAL THOUGHTS

- 1. Know your purpose/reason.**
- 2. Get commitment from all levels of management and supervision.**
- 3. Develop an approach that ensures consistency.**
- 4. Create a set of standardized questions that are included in all interviews – but allow supervisors to customize their interview.**
- 5. Ensure the development of Retention Plans and the sharing of results with HR.**
- 6. Take the appropriate HR actions informed by the collective interview results.**



Sunset Over
Black Earth Creek

Life is ten percent what happens to you and
ninety percent how you respond to it.

Lou Holtz
American Football Coach
b. 1937

I am not what happened to me;
I am what I choose to become.

Arno River
Florence

– Carl Jung

Swiss psychiatrist

b. 1875, d. 1961

Thank you!

Lake Minocqua Sunset

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