

**HR Playbook**

# The Great HR Strategy Guide

*"Kumar paints a new vision for what HRs can achieve."  
Times of India, Rahul Gawani*

**Author: Vishal Kumar**



## A word from the author

Why did I put together this guide? Alongside my friends at Loop Health, I've reviewed proprietary data from nearly 3,000 partners and found that the most successful HRs and recruiters are deeply tactical. These leaders track project management, cost analysis and map people management metrics to business outcomes. We've decided to share these insights with the HR community at large in order to help practitioners go from HR *analyst* to HR *strategist*. **These guides will be useful for new HR associates who are learning about the world of organizational management, as well as HR veterans interested in elevating their game. This is a collection of templates, cheat-sheets, and checklists to make your life easier.**

Over my career at GE, Tata, and Elevate I've been fortunate to work with visionary HRs everyday. My HR colleagues work across their organizations to optimize not only hiring, compliance, productivity and retention, but employee experience, leadership, learning, development and more. It's not uncommon for HR to be at the centre of organizational restructures and establishing company values – and these areas are more important than ever for modern companies. Setting expectations and prioritizing areas to focus on has never been more challenging. With these challenges come significant opportunities for HR leaders.

- Vishal Kumar

# Before we get started

At Loop Health, we're building the easiest-to-use health benefit provider in India. We offer free OPD services for all of our partner companies. Learn more at [www.loophealth.com](http://www.loophealth.com) or reach out to our Head of Partnerships, Pranaav Marathe, directly at [+91 99703 58844](tel:+919970358844)

## A better corporate health plan

- ✓ Free, unlimited doctor visits for employees
- ✓ Spend less than 2 minutes per claim



# Loop HR Guides

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# Section 1:

## Recruiting and onboarding

### **Topics covered;**

- Checklist for recruiting
- Recruiting for diversity
- New Hire onboarding template
- 30-60-90 day plan on new remote employees

# The perfect hiring checklist?

The perfect hiring checklist is a template that captures all major steps in the end-to-end hiring process.

## Why we like it

1. **Adaptable.** Fits your company's hiring process.
2. **Succinct.** Quickly communicates your end-to-end hiring process.
3. **Useful.** Helps you develop your ATS process, works in a pinch for companies who don't have an ATS.

You can also read a breakdown of each phase in the process below:

## Planning checklist

- Identify the need for a new position.
- Write a job description for the new role.
- Edit for unconscious bias. Use textio for gender decoding.
- Open job request.
- Get job description approval from stakeholders.
- Select your interview team.
- Determine salary range.
- Get salary range approval.

## Sourcing checklist

- Post job description to begin sourcing candidates.
- Use ATS to post to multiple job boards. See more here to manage and post a job opening.
- Send an announcement to the company asking for referrals, encouraging referrals for diverse and talented candidates.
- Encourage internal candidates to apply if applicable at your company.
- Screen resumes and cover letters.
- Send top candidate resumes to the hiring manager for review. This is often managed through your ATS.
- Select candidates from the talent pool to advance to the interview process.

### **Phone screen checklist**

- Schedule and conduct phone screens with top candidates.
- Leave feedback on candidate profiles in your ATS or record elsewhere if you don't have one.
- Note: All feedback should be based on job fit. Do NOT assess candidates based on "cultural fit," personality, or "gut feelings."
- Instead of "cultural fit," consider cultural addition, and ensure that all feedback relates to specifics around the ability to perform the job.
- Send declination email to candidates who are not a good fit based on the phone screen. Note: do not use this for candidates who have interviewed in person.
- Send candidates who should move forward to hiring managers for review.

### **Take home assessments checklist**

- Design candidate assignments or send performance assessments if this is part of your process.
- Review performance assessments.
- Send declination email to candidates who are not a good fit based on performance assessment.

### **Interview prep checklist**

- Plan interviews with the interview team: Who is interviewing for what?
- Hiring managers recommend a meeting to debrief with all members of the interview team: You can't trust people to conduct good interviews, even if they're good interviewers. You need to have the in-person sit down to agree on:
  - Who is interviewing for what?
  - What specific learning capacities are we looking for
  - Is there knowledge they must know?
- Set interview schedule: who, what, where, when?
- Prepare interview questionnaires.
- Schedule interview with candidates and interviewers.
- Designate who will welcome the candidate.

- Double check that all interviewers are prepared for interview day and have their schedules blocked off for their interview timeframe.

### **Interview day checklist**

- Greet candidate:
- Tour office.
- Introduce candidates / make them feel welcome.
- Offer water / beverage, use of facilities.
- Conduct interviews.
- Wrap up interview day.
- Walk candidates out.

### **Post interview checklist**

- Interviewers document feedback privately to avoid group bias.
- Meet with the interview team if necessary to make a decision.
- Select top candidate.
- Phone call to decline candidates to whom you are not extending an offer, be sure to ask them for feedback on their experience interviewing with your company.
- Keep second tier candidates warm until you have a decision from your top candidate.
- Request references and complete reference check.

### **Making the offer checklist**

- Send the candidate an informal welcome email to let them know an offer is coming.
- Encourage the interview team to send emails to welcome candidates.
- Develop an offer package.
- Schedule informal offer call.
- Conduct informal offer call:
- Revise offers as necessary or as makes sense for the company and candidate.
- Get offer approval from leadership.
- Send a formal offer to the candidate.
- Background checks (not just criminal, background checks also fact checks resumes and others areas of the application). We recommend using Checkr.

- If a candidate rejects the offer, refer back to the talent pool for more interviews or continue sourcing.
- If the candidate accepts the offer, notify the hiring manager and welcome the candidate.

# Recruiting for diversity

## Guide: Improving Your Recruiting Pipeline's D&I

### Where diversity and inclusion breakdowns during the recruiting process

The recruiting process or talent acquisition is a key HR functional process that enables the diversity and inclusion in organizations. Once a requisition for a position is opened, the recruiting process begins with these steps:

- Preparing (e.g., writing job descriptions and job posts)
- Sourcing
- Screening
- Hiring
- Onboarding

Diversity and inclusion efforts can break down at every stage of the recruiting process in the following ways:

Step	Common mistakes causing D&I breakdown
Preparing	<ul style="list-style-type: none"> <li>• Job description/job posts contain biased language.</li> <li>• Job description/job posts are not up to date and do not clearly articulate the role expectations,</li> </ul>

	<p>skills, and experience required for the job.</p> <ul style="list-style-type: none"> <li>● Not casting a wide enough net by either posting in too few places or posting only in places that do not attract a diverse candidate audience.</li> </ul>
<b>Sourcing</b>	<ul style="list-style-type: none"> <li>● Not expanding your recruiting funnel to seek out diverse candidates or not expanding your network and recruiting third-party partnerships to include diverse candidate sources.</li> <li>● Not soliciting input and assistance from employees and managers in the sourcing effort.</li> <li>● Sourcing for candidates from diverse organizations and institutions but never actually hiring any.</li> </ul>
<b>Screening</b>	<ul style="list-style-type: none"> <li>● Asking inappropriate or illegal questions.</li> <li>● Inconsistency in the way the interviews are conducted.</li> </ul>
<b>Hiring</b>	<ul style="list-style-type: none"> <li>● Not hiring based on qualifications but using hiring quotas as the criteria.</li> <li>● Pay inequity.</li> <li>● Appealing to some job seekers more than others because of bias (this sometimes shows up as selecting candidates by fit instead of addition and the Halo/Horn Effect [e.g., candidates that are most like the</li> </ul>

	<p>hiring manager or others in the company may be viewed more positively (Halo) than those who are different (Horns)].</p>
<p><b>Onboarding</b></p>	<ul style="list-style-type: none"> <li>• Manager provides inadequate access to knowledge and information.</li> <li>• Manager does not spend sufficient time with the new hire, short-circuiting the ability to build rapport and forge connections both with them and the org.</li> <li>• Manager does not connect new hires with mentors and the broader employee community to assist in their assimilation thus creating isolation and possible early departure.</li> </ul>

Below are steps to avoid breakdowns at each stage of the recruiting process:

<p><b>Preparing</b></p>	<ul style="list-style-type: none"> <li>• Research and identify key job posting sites that relate to the job requirements and to diverse audiences.</li> <li>• See our list of recommended diversity job boards and follow these organizations on LinkedIn and post jobs on those sites.</li> </ul>
<p><b>Sourcing</b></p>	<ul style="list-style-type: none"> <li>• Research and identify civic organizations, higher education institutions, professional</li> </ul>

	<p>associations, career fairs, and conventions that might serve as good sourcing.</p> <ul style="list-style-type: none"> <li>● We recommend these D&amp;I initiatives:</li> </ul>
<b>Screening</b>	<ul style="list-style-type: none"> <li>● Is your recruiting team forwarding resumes with diverse names? Or not? Hiring managers can't hire diverse teams if the recruiting team isn't forwarding diverse candidates, even if you subsequently read them blind.</li> <li>● Interview female and minority applicants before any white male applicants.</li> </ul>
<b>Hiring</b>	<ul style="list-style-type: none"> <li>● Make offers only to candidates who meet the qualifications for the job, not because they fulfill a diversity quota.</li> <li>● Ensure that all offers are commensurate with the candidate's experience, the market rate, and internal equity.</li> <li>● When candidates are qualified but are being discounted, HR must raise the unconscious bias or Halo/Horns concerns and make recommendations.</li> </ul>

**How to eliminate bias in your job posts**

1. **Steer clear of gender bias in titles** (e.g., fireman vs firefighter; councilman vs council member, chairman vs chairperson; cleaning lady or maid vs cleaner).

2. **Use gender neutral pronouns** (e.g., “they/them” instead of “[S/H]e/Him/Her”)
3. **Avoid labels that may suggest male bias** (e.g. rockstar, ninja, workmanship).
4. **Note that some everyday words are indicative of female-bias or male-bias.** This is just a sample:

<b>Female-biased</b>	<b>Male-biased</b>
People-focused	Competitive
Collaborative	Assertive
Inclusive	Driven
Supportive	Dominant
Tactical	Strategic

**When referring to members of the military or veterans, avoid gender bias in reference to their significant others** (e.g., veterans and their partner/spouses vs veterans and their wives).

6. **Watch for use of terms and phrases that suggest age preference** (e.g., high-energy = code for youthful; mature = code for older adults).

7. **Avoid corporate speak and jargon.** It hinders entry-level talent from applying even though they may be qualified for the job (e.g., KPI’s, procurement, CRM, SLA’s, P&L, etc).

**8. Emphasize the organization's commitment to diversity and inclusion by including:**

- **A diversity and inclusion statement:**
- A prominent fortune 500 company's posted inclusion statement: Include, value and trust each other. We are smart alone but together we are genius. This means being inclusive, giving the benefit of the doubt and being responsible for each other. Because, for our company to thrive for the next 100+ years, smart isn't enough. We need genius.
- **EEO/AA/Veterans commitment:**
- A sample EEO statement: We are an Equal Opportunity Employer and do not discriminate against any employee or applicant for employment because of race, color, sex, age, national origin, religion, sexual orientation, gender identity and/or expression, status as a veteran, and basis of disability or any other federal, state or local protected class.
- Adapt this EEO/Affirmative Action commitment policy and include in your Employee Handbook.
- **Any special initiatives or programs that reinforce the commitment**

**9. Call out inclusive benefits in the posting** (e.g., parental leave, domestic partner health benefits, etc.).

# New Hire onboarding template

Growth Stage New Hire On-boarding Plan Template

## Day One Agenda

(Let your new hire know what they've gotten themselves into for the first day/week, etc.)

Pro tip: Give yourself enough time in the morning to get your coffee, make your breakfast, check your emails, print or share documents, and handle any last-minute tasks before your new hire arrives.

10:00 a.m. - Office Tour (Room names, department islands or areas, common areas 🚪 to hang out in)

10:30 a.m. - Kitchen Tour (like, where the ☺ are at for their morning cup of ☕)

11:00 a.m. - Review On-boarding Plan

12:00 p.m. - Team Lunch

1:00 p.m. - Coffee Run! (Manager, on-boarding buddy, person they clicked with during the interviewing process)

2:00 p.m. - Flex time, take it all in, start working on checklists & reading lists (First day can be overwhelming)

### Working Cadence

Don't leave your new-hire wondering when they're supposed to be somewhere

Here's a list of meetings you've been added to:

- Monday Team Stand-up
- Weekly 1:1s (Tuesday's at 4:00pm)
- Team Lunch (M, W, F at 12:00pm)
- Friday All-Hands
- Daily Growth Stand-up

### Goals for this week [Dates]

Things in this first week should be things like:

- Review Welcome Kit

- Technology squared away (Do you have all of the tools and software you need?)
- Chip away at reading list (listed below)
- Complete employee profile for company intranet
- Wrap-up any new-hire paperwork
- Get set-up with benefits & perks
- Meet your team

### **30 Day Goals**

What does success at 30 days look like?

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- **30 day check-in scheduled for [Date, time]**

### **60 Day Goals**

*What should this new-hire be able to do or accomplish by the end of 60 days?*

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- **60 day check-in scheduled for [Date, time]**

### **People To Meet**

Please take some during your first couple of weeks to reach out to the team members.

- [Example] Aubrey Willis, Chief of Staff
- 

## Resources

Below is a list of documents, articles, AirTables, and MiroBoards for you to familiarize yourself with and help get you up to speed: [Note if these are in order of importance]. Please feel free to reach out to me or anyone on our team if you have questions regarding these materials.

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# 30-60-90 day plan on new remote employees

Now that you have brought on a new remote employee, it's time to set themselves up for success. The key will be defining what success looks like in a 30-60-90 day plan. Review the plan together with the employee during their first week and you will develop an outline that you both are invested in.

Days 1-30 should be focused on assessment and info gathering. Days 30-60 should be centered on planning activities and embracing the role. Days 60-90 should be the execution/review stage.

 **15 days**

**The new hire should:**

- Be introduced to all important teams they will work with on a regular basis. (Book one-on-one with key cross-functional team members who will be the first point of contact).
- Be trained on the tech stack: CRM, productivity tool, IT, HR & support tools, etc.
- Have a daily check-in the first week to support the new hire through the technology and people learning phase.
- Had a 1:1 at the 10 and 15 day mark to help bridge the problems faced

### **Questions to ask in 1:1:**

- What do you like about the job and the organization so far?
- What's been going well? What are the highlights of your experiences so far? Why?

### **30 Days**

#### **The new hire should be:**

- Comfortable with the technology stack used and should be able to use them with minimum supervision.
- Collaborating with different teams
- Following necessary Slack channels for cross-team collaboration.
- Participating in weekly team meetings, All Hands, Townhall
- Planning activities, setting goals and objectives

### **Questions to ask in 1:1:**

- Any blockers or any misunderstanding about our organization now that you've had a month to experience the role?
- Have you faced any surprises since joining us?
- What could we have done differently during the interviewing process to realistically prepare you for your new role?

### **60 Days**

#### **The new hire should be:**

- Fully complete with company training, all tools and sources of information are understood

- Reaching their weekly KPI goals and monthly metrics
- Developing rapport with each team member
- Recommending changes to improve their assignments
- Comfortable with the standard 1:1 timeline and process with their manager

#### **Questions to Ask:**

- Do you have enough, too much, or too little time to do your work?
- Do you feel you haven't been sufficiently trained in any aspects of your job to perform at a high level?
- What do you need to learn to improve? What can the organization do to help you become more successful as you transition further into your role?

#### **90 Days**

#### **The new hire should be:**

- Meeting or exceeding their OKR objectives and KPIs
- Finishing projects they have started since joining the company
- Having a 90 day evaluation with their manager where they grade the onboarding process

#### **Questions to ask:**

- Which coworkers have been particularly helpful since you arrived?
- Who do you talk to when you have questions about your work?
- Have you had any uncomfortable situations or conflicts with supervisors, co-workers or customers?
- How would you grade us in terms of our extended onboarding program, and what suggestions can you share that would make our program stronger?

## Section 2:

# Building Great Culture

## **Topics Covered**

- Driving organizational values
- Making remote work awesome
- Time management

# Driving company values

Company culture begins with core values. The selection of your core values must be the product of introspection, deliberation, collaboration, and ultimately consensus among your company's leadership. This process should take time (plan on a two week timeframe for the steps listed below). Crafting meaningful core values will result in a cohesive and inspiring foundation for your company culture. Defining your values begins with having a clear understanding of your company's mission statement. Your values should reflect HOW your mission serves clients, employees, and the community.

Values will vary widely from company to company, but there are some general guidelines to effectively deciding which of them are yours:

<p>1. Choose who should be involved.</p>	<ul style="list-style-type: none"><li>• Depending on the size of your company, this could be the founding partners, the management team, or a select committee representing a cross section of your company.</li><li>• It's critical that these team members are committed to draft and implement your values, and agree that the chosen values will be a foundation for your team going forward.</li></ul>
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<p>2. Start with a brainstorm</p>	<ul style="list-style-type: none"><li>• The above team should come to a brainstorming meeting prepared with ideas about what is important to them as individual representatives of the team.</li><li>• Remember, this is an idea generating stage and the goal is to discuss what's important and not important and why. Don't get caught up in selecting the perfect set of values yet.</li><li>• This session should yield 30-50 words or ideas about values. It's okay if they feel ambiguous. It's also okay if you have more or fewer words or ideas; aim for that range.</li><li>• Make sure you write this all down!</li></ul>
<p>3. Consolidate, Eliminate, and Define</p>	<ul style="list-style-type: none"><li>• Take time with this next section. Plan about one week total for two working sessions and some time to marinate over your initial thoughts, as described below:</li><li>• Write every one of the 30-50 words/ideas on a post it notes.</li><li>• Put all the posts it notes on a wall.</li><li>• As a team, start consolidating them into groups.</li><li>• For example, you might have a lot of concepts around customer service, or a desire for constant improvement.</li><li>• You'll see a natural pattern start to emerge - you may need to eliminate outliers (if there is a post it that feels off or out of place, its perfectly acceptable to discard it).</li></ul>

	<ul style="list-style-type: none"><li>• Once you have the concepts consolidated into groups, you should “live with” them for a few days. This process can be intense and it's important to get it right. When you're ready to reconvene, discuss which concept groups resonate with the team.</li><li>• Select 3-5 word / idea groups.</li><li>• It's important not to have too many - if you value everything, nothing is a true priority.</li><li>• Choose a word or short phrase for each group, and a 1-3 sentence definition that captures the groups' overarching intention.</li></ul>
4. Frame	<ul style="list-style-type: none"><li>• Now that you've selected your 3-5 values and you have a definition for each one, reflect on how you can frame them in a way that is relatable to your company.</li><li>• For example, at one organization, we initially had “Teamwork” as a value, but we found it was more actionable when we changed it to “Be Collaborative.”</li><li>• Think about what your team will respond to; humor, brevity, action, words - it all depends on the culture you're adopting.</li></ul>
5. Evaluate	<ul style="list-style-type: none"><li>• View your values as a holistic set and make sure they encompass everything you intend for your company or group. Are you willing to live these values, and hold the team accountable for these values?</li></ul>

# Behavioral Rubrics

Once you have established your core values, identify behaviors that describe what detractor, contributor, and leader level behaviors look like for that value. These values must be tangible and understandable by all employees. Think about things that happen every day and how they add to, or detract from, the values you've set out.

Detractor	<ul style="list-style-type: none"><li>• Which behaviors do not meet the standards of your organization?</li><li>• Which behaviors prevent others from behaving in a way that reflects the value?</li></ul>
Contributor	<ul style="list-style-type: none"><li>• Which behaviors meet expectations and set a good example for others in the organization?</li><li>• Contributor level values should be the standard for all employees in their every day interactions.</li></ul>
Leader	<ul style="list-style-type: none"><li>• Which behaviors demonstrate commitment and mastery of the value, and encourage others to live the value?</li></ul>

<b>Value</b>	<b>DETRACTOR</b> Does not meet the standards personally and/or detracts from others meeting the standards	<b>CONTRIBUTOR</b> Meets expectations and practices leadership by example	<b>LEADER</b> Demonstrates commitment and mastery, encouraging others to do the same
<p><b>Make room at the table</b></p> <p>We're committed to growing &amp; empowering a more inclusive community within our company, industry, &amp; cities. We believe that true innovation happens when everyone has the tools, resources, &amp; opportunity to thrive.</p>	<ul style="list-style-type: none"> <li>Is dismissive or critical of input from others</li> <li>Communicates without recognizing the impact on relationships</li> <li>Takes action before understanding all stakeholders and their requirements, expectations, and needs</li> <li>Under or over informs stakeholders about business actions &amp; results</li> <li>Doesn't demonstrate diversity in actions</li> <li>Believes every voice must be heard in every conversation</li> <li>Participates in preferential treatment</li> </ul>	<ul style="list-style-type: none"> <li>Is welcoming of input from others</li> <li>Contributes to an environment of authenticity</li> <li>Communicates with regard for the impact it has on relationships</li> <li>Understands stakeholder requirements, expectations, and needs</li> <li>Informs stakeholders appropriately about business actions and results</li> <li>Prioritizes equity over equality</li> <li>Is not egocentric; allows colleagues to shine</li> </ul>	<ul style="list-style-type: none"> <li>Actively seeks input from a diverse audience</li> <li>Is a role model for effective communication</li> <li>Takes a proactive approach to manage stakeholder expectations after understanding their needs, expectations, and requirements</li> <li>Consults with stakeholders on their preferences for staying informed about business actions and results</li> </ul>
<p><b>Think outside the room</b></p> <p>Our organization is decentralized so considering other teams &amp; hearing from other locations is critical for success.</p>	<ul style="list-style-type: none"> <li>Operates in a silo, not seeking to maximize efforts across departments</li> <li>Defers decisions unnecessarily, or does not seek the proper input from stakeholders</li> <li>Makes decisions that impact other departments without consulting affected teams</li> <li>Engages in groupthink</li> <li>Assumes every office location is the same</li> </ul>	<ul style="list-style-type: none"> <li>Consults with other departments to add cross functional value</li> <li>Gains input from appropriate stakeholders before taking action</li> <li>Seeks out different perspectives</li> <li>Is empathetic</li> <li>Practices inclusivity in every respect</li> <li>Treats cross functional partners as customers / clients</li> </ul>	<ul style="list-style-type: none"> <li>Actively identifies cross-functional opportunities for efficiency or better results</li> <li>Models quality decision making for others, explaining their rationale and reasoning</li> <li>Actively includes and keeps in the loop non team stakeholders</li> </ul>
<p><b>One team, one fight</b></p> <p>We're in this together, and both success and failure are shared. We are intentional about creating a high-accountability, no-blame culture.</p>	<ul style="list-style-type: none"> <li>Avoids giving feedback, or seeking feedback from others</li> <li>Engages in conflict in a way that will not lead to productive outcomes (puts people on the defensive, is emotional, too accommodating, insensitive, etc)</li> <li>Stays silent to not ruffle feathers</li> <li>Ignores our unique differences</li> <li>Prioritizes "getting along" over resolving conflict</li> </ul>	<ul style="list-style-type: none"> <li>Believes in doing things for the greater good</li> <li>Acts on feedback regarding leadership behaviors as well as tactical skills</li> <li>Appropriately delegates or shifts decisions to others</li> <li>Engages in productive conflict, finding common ground and driving toward solutions</li> <li>Recognizes others' accomplishments</li> <li>Gains trust and support from peers</li> </ul>	<ul style="list-style-type: none"> <li>Creates healthy forums for blame free post mortems</li> <li>Actively seeks feedback to improve their leadership, and follows through with plans for improvement</li> <li>Uses delegation as an opportunity to actively and deliberately progress careers and development of others</li> <li>Models productive conflict and diffuses high-tension situations effectively</li> </ul>

## Using the behavioral rubric

- Print and laminate a copy of the values for every member of your team. I use a dry erase marker on the laminated page in almost every conversation I have with a direct report. This drives clarity and understanding of the values, and helps employees live them every day.
- Using the rubric in all conversations makes the values livable. Use it to identify leadership behavior as well as for tough conversations. The rubric depersonalizes behavior and can help remove bias and opinion out of performance conversations. By using the rubric, everyone understands expectations and can see a straight path between where they are today and where they need to be to advance their career
- Use the rubric during formal performance reviews to help employees understand the link between how they do their work (their behaviors) and what work they do (their objectives and KPIs).

# How to make remote work awesome

## Overview

This remote work guide reviews the processes necessary for making remote work awesome for individuals and teams:

- Mitigate remote work drawbacks
- Manage meetings with remote workers
- Manage remote team communications
- Ensure accountability
- Manage remote employees

## Benefits and drawbacks of remote work

Pros	Cons
Reduce or eliminate your commute.	May be out of sync with coworkers due to time zone differences.
Work on your own schedule.	May need to adjust your schedule to accommodate different time zones.
Less distractions from coworkers.	More distractions from family, the guy at the table next to you, social media, etc.
Less expenditures (e.g., travel, eating out, etc.)	Less opportunities for interactions with coworkers.

You don't have a direct supervisor.

You don't have a direct supervisor.

## Mitigate remote work drawbacks

While there are clear benefits from remote work (e.g., save money and time from skipping that two hour commute), there are challenges that should be addressed to keep your remote work experience awesome.

Managing time zone differences.	<ul style="list-style-type: none"><li>• Be efficient in asynchronous communications.</li><li>• Be specific and provide sufficient details about questions and problems you need assistance with to ensure the response meets your needs and does not require scheduling a 4AM call to clarify things.</li></ul>
Managing distractions.	<ul style="list-style-type: none"><li>• Sources of distraction are myriad and you are responsible for managing them as a remote worker.</li><li>• You'll need to be your own supervisor and stay on track when it matters.</li><li>• Set boundaries so that while you are maximizing time with family, that they are aware of times when you need to focus on work. If you have a home office with a door, simply closing the door could signal "Do Not Disturb." If you work in a shared space, putting on headphones could be your "Do Not Disturb" sign. If working from home proves to be nonfunctional, working from a coffee shop, library or other public space with wifi is a common tactic for both remote workers and on-site workers that need to escape the distractions of the office. If you'd prefer a more professional alternative, coworking spaces offer an office</li></ul>

	<p>setting (WeWork, etc.), but at a cost.</p>
<p>Less interactions with coworkers.</p>	<ul style="list-style-type: none"> <li>● If you are used to the social interactions with human beings and you suddenly find yourself working at home, alone, the transition can be difficult.</li> <li>● Setting up times to video chat with coworkers is one way to keep a connection going and have relevant work-related conversations.</li> <li>● Your company should also provide meetup opportunities (see the section on Meetups, below).</li> <li>● Coffee shops and coworking spaces also provide opportunities to interact with people or at least be in a space with more than your thoughts and the cat. If you are really looking to connect with people in your field of work, social media from Facebook to Meetup provide opportunities to connect with people that share your interests.</li> </ul>
<p>No supervisor.</p>	<ul style="list-style-type: none"> <li>● Not having a supervisor requires you to put on your own supervisor's hat.</li> <li>● If your team does scrum-style development, you may already have an accountability model worked in.</li> <li>● If you find that your productivity is slipping, setting up accountability sessions with a coworker or remote supervisor might be worth exploring. Provide a daily update of tasks completed and tasks to be started the following day posted to a Slack or Teams chat with your supervisor. Follow this up with a weekly review.</li> </ul>

No office.	<ul style="list-style-type: none"><li>• Home office. Create an office space and set it up for comfort and efficiency.</li><li>• Get a good desk and chair, an internet connection, lighting, any equipment you might need for video conferencing, etc.</li><li>• Some progressive companies will even purchase home office equipment for their remote workers.</li><li>• Use meetup opportunities to get human interaction.</li><li>• The coffee shop. This works for some as an ideal workplace and is too distracting for some. You'll have access to (generally free) WiF and opportunity for human interaction.</li><li>• There is an expectation that you will pay "rent" by purchasing coffee and food.</li><li>• Coworking spaces. These can provide temporary or dedicated desk space along with office support services such as mail service, photocopying, and provide an opportunity to socialize with people. These spaces do, however, cost for the services provided.</li></ul>
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## Meetings

Effective meetings should:

1. Respect the allotted time.
2. Have an agenda.
3. Have a coordinator.

<p>When recurring meetings lack agenda topics...</p>	<ul style="list-style-type: none"> <li>• Cancel them.</li> </ul>
<p>In cases where an agenda is defined...</p>	<ul style="list-style-type: none"> <li>• The designated meeting coordinator helps keep the discussion on topic, limits rambling commentary, and makes sure the meeting time limit is respected.</li> <li>• Topics not addressed can be slated for a subsequent meeting, or interested participants could extend the meeting at their discretion with other participants dropping off.</li> </ul>
<p>If the team engages in daily updates...</p>	<ul style="list-style-type: none"> <li>• Use the scrum or daily standup model to stay efficient and keep on track. The point is to keep these team meetings short, with 15 minutes being a long standup meeting. The basic template standup is as follows: A meeting coordinator (scrum master) is responsible for keeping members on track and on time. It is their job to ruthlessly make sure no one goes over their allotted time. All team members provide a one or two minute (maximum) update on tasks completed yesterday, tasks being worked on today, and any challenges or blockers. After the update, actions to help team members overcome blockers can be defined. At this point the stand up meeting is done. Further discussions can happen after the update and may lead to team members interested in the</li> </ul>

	<p>topic remaining on the call/in the meeting while others may then drop off.</p> <ul style="list-style-type: none"><li>• Use this format of "Done, Doing, Blocked" in a virtual format where team members can post their daily standup report in a dedicated team chat channel. If using this virtual format is helpful to still define a time for the update to be posted, say between 9-9:15 AM. This allows everyone to get the standup information promptly and also take action on helping to resolve blockers.</li></ul>
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## Managing Time Zones

When meeting across time zones, it is always good to be clear about which time zone a meeting date/time is being set for - PST, EST, etc. Any modern calendaring application (Google Cal, Microsoft Outlook, iCal, etc.) allow users to set meetings in their local time zone and allow participants to see the time in their local time, just make sure that your settings are correctly enabled.

Time zones can be especially challenging to remote workers if the most other co-workers are many time zones removed. Generally, teams will try to accommodate peripheral time zones, but there are times when the odd man out will need to get up early or stay up late to meet with the majority. In these cases, carefully consider when the remote worker's attendance in these meetings is actually required and making use of asynchronous communications as a standard communication alternative.

## Remote team communications

All of the tools below can be used on a one-to-one or group communication mode. The tools below are listed in order of least urgency to most -- that is, how quickly do you expect a response from one of the methods below.

Note: Some tools that allow adding members to ongoing conversations. In certain situations, this may reveal sensitive information that was not intended for the new additions. As always, know how your tool works and share with care.

### Email

When to use	<ul style="list-style-type: none"><li>• To provide a traceable record of communications.</li></ul>
Benefits	<ul style="list-style-type: none"><li>• Great for longer form communications that exceed the expectations or limits of texts or direct messages.</li></ul>
Drawbacks	<ul style="list-style-type: none"><li>• Can be time consuming to craft when dealing with complicated topics.</li><li>• Not always considered time sensitive. Urgent communications can get overlooked in the inbox.</li></ul>
Best Practices	<ul style="list-style-type: none"><li>• As a remote worker or remote worker manager, set clear expectations. For example, work related emails should be checked twice a day or responded to within 24 hours.</li></ul>

### Group Chat

When to use	<ul style="list-style-type: none"> <li>• To provide a traceable record of communications.</li> </ul>
Benefits	<ul style="list-style-type: none"> <li>• Direct messaging capabilities, audio and video calls.</li> <li>• Channels where people can communicate on specific topics.</li> <li>• Customizable in limitless ways. For example they can be:Project-based (XYZ Application Development Project)Topical (Website Production Team)Non-work related (Remote Worker Socials)</li> <li>• New additions to these channels can review past communications and get a sense of what is going on.</li> </ul>
Drawbacks	<ul style="list-style-type: none"> <li>• Busy channels can become a source of distraction.</li> <li>• Multiple channels can be distracting.</li> </ul>
Best Practices	<ul style="list-style-type: none"> <li>• Consider what you post, as many of these tools preserve the history of all the communication of these channels, even after members have left.</li> <li>• Many chat apps have a way to message all members. Use this sparingly.</li> </ul>

## Direct message

When to use	<ul style="list-style-type: none"> <li>• When you want to communicate privately with an individual or small group (much like a group text).</li> </ul>
Benefits	<ul style="list-style-type: none"> <li>• Direct messages are generally treated as important/urgent by recipients.</li> <li>• Can provide a conversational back and forth that bridges between the typical timing found with email</li> </ul>

	and a live conversation.
Drawbacks	<ul style="list-style-type: none"> <li>• Notifications can be disruptive if working across timezones.</li> </ul>
Platforms	<ul style="list-style-type: none"> <li>• Most modern business communications platforms provide direct messaging features. Microsoft Teams, Slack, and Google Hangout Conversations.</li> </ul>
Best Practices	<ul style="list-style-type: none"> <li>• Depending on how your team manages brief communications, something that is Twitter length or that you could envision texting is appropriate for a direct message. Note: Some tools allow members to add new members: unless these new additions are somehow blocked from seeing prior communications, they may be able to review the discussion prior to their addition.</li> <li>• Be clear about response time expectations and boundaries. Some tools allow settings to snooze notifications outside of your local working hours to help maintain work/life boundaries.</li> </ul>

## Text message

When to use	<ul style="list-style-type: none"> <li>• When you want to receive a reply fast.</li> <li>• When the recipient may not be immediately available for a phone/video call and the message is important to deliver.</li> </ul>
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Benefits	<ul style="list-style-type: none"> <li>• A reply can be expected in a short timeframe.</li> <li>• A good way to get a response for an urgent matter.</li> <li>• Asynchronous - even if the recipient is not available when the message is sent, the message should get a response when read.</li> </ul>
Drawbacks	<ul style="list-style-type: none"> <li>• Can be challenging to use across time zones, especially if you are not sure of the recipient's current time zone (i.e. Is the recipient travelling or at the workplace?)</li> </ul>
Best Practices	<ul style="list-style-type: none"> <li>• Usually a form of escalation after trying one of the other options above (especially if you are texting someone's personal number).</li> </ul>

## Phone Calls

When to use	<ul style="list-style-type: none"> <li>• Replacement for in person meetings for remote workers.</li> <li>• Can be expected to be a regular part of a remote workers day.</li> </ul>
Benefits	<ul style="list-style-type: none"> <li>• Immediate response as long as the recipient is available.</li> <li>• Highly effective as long as care is taken that participants are in locations with good reception (if on a mobile device) and minimal background noise.</li> </ul>

Drawbacks	<ul style="list-style-type: none"> <li>• Can be challenging to use across time zones, especially if you are not sure of the recipient's current time zone (i.e. Is the recipient traveling or at the workplace?)</li> </ul>
Best Practices	<ul style="list-style-type: none"> <li>• Unplanned calls are another form of escalation if other contact methods have failed, or the matter is urgent.</li> <li>• Scheduled calls on your calendar and add a notification just prior to the call.</li> <li>• Take the time prior to the call to assure you are in an area with minimal noise and good connectivity.</li> </ul>

## Video Calls

When to use	<ul style="list-style-type: none"> <li>• Scheduled video calls can replace meetups.</li> </ul>
Benefits	<ul style="list-style-type: none"> <li>• Adds visual cues to the communication process.</li> <li>• A great way to increase communication clarity between team members.</li> </ul>
Drawbacks	<ul style="list-style-type: none"> <li>• Video and audio settings need to be setup correctly.</li> <li>• Video can take up a lot of bandwidth and a suboptimal connection can cause a choppy video and audio stream that is difficult to understand.</li> <li>• Care must be taken to assure that no sensitive (business or personal) items or information are visible in the video view.</li> </ul>

<p>Platforms</p>	<ul style="list-style-type: none"> <li>• Set up a person to person video chat with your phone’s native video service (e.g. iPhone’s Facetime).</li> <li>• Tools that support video communications: Skype, Microsoft Teams, Google Hangouts, Go to Meeting, and Zoom.</li> <li>• Many support basic functionality for free, with paid versions adding features like multiple participants and session recording.</li> </ul>
<p>Best Practices</p>	<ul style="list-style-type: none"> <li>• Unplanned video calls are generally to be discouraged, unless team members have set expectations that these sorts of calls are expected. Even if they are, team members should always have the option of joining even video conferences in audio only mode at their discretion.</li> <li>• Users should take time to set up and validate their video setup: Make sure audio and video work. Verify that you have enough lighting. Make sure anything in the video view area is ok for any participants to see.</li> </ul>

## Meetups

<p>When to use</p>	<ul style="list-style-type: none"> <li>• Social team-building events that focus on building bonds between on site and remote team members.</li> <li>• Work-focused events with social aspects being secondary.</li> <li>• For strategic planning.</li> <li>• For “hackathons” like intensive problem solving or</li> </ul>
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	development events.
Benefits	<ul style="list-style-type: none"> <li>• Typically improves the connection between team members for the better.</li> </ul>
Drawbacks	<ul style="list-style-type: none"> <li>• There is some cost in travel time and transportation.</li> <li>• Additional costs can be incurred for larger events.</li> <li>• Poor planning (meetups with no clear understanding of costs and benefits) can easily result in net negative outcomes for the business.</li> </ul>
Best Practices	<ul style="list-style-type: none"> <li>• Depending how distributed your remote team is, differing cadences of in person meetups can be implemented: Weekly. Some remote workers find frequent time away from their real (remote) office disruptive. In other cases, weekly face-to-face time can be a huge benefit for collaborative work. Determine whether weekly meetups are a plus or minus for the productivity of your remote employees. Monthly. Depending on project requirements, teams may meet up on a monthly basis, sometimes flying remote workers in from remote locations. The benefit of this meeting will need to outweigh not just the money spent on travel, but also the cost in time (productivity) spent travelling. Have a clear goal (outcome) for these meetup sessions. Monthly meetups are an opportunity to build team spirit among remote and on-site employees through social interactions and events. Annually. Be clear on why you are putting the effort into bringing the team</li> </ul>

	<p>together in order to determine how effective the outcome of this special event will be.</p> <ul style="list-style-type: none"><li>• Note: Regardless of how often your remote team is on site or a fully distributed team comes together for a meetup, it is important to be clear about meetup objectives. Social events have a purpose, but having a remote employee show up in the office just “to see their face” is a poor objective.</li></ul>
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## Ensure accountability

The biggest shift in dealing with remote workers is how to manage accountability. As your employee is no longer in sight, it is more difficult, though not impossible, to know if they are on task or not. Having an explicit project management process (see the next section) can help keeping track of task progress of the entire team. Regular meetings or virtual updates can provide both a means to keep team connected and provide accountability for continued progress.

## Self-accountability

Keeping yourself accountable is a challenge many remote workers don't count on. Setting your own schedule can make it tempting to take off more time than you should, or procrastinate on moving forward on assigned tasks.

### Scheduling

Scheduling working hours for yourself is a way to define your working life from your personal life. Although flexibility of time is a big benefit of many remote work positions, it is a good idea to set yourself regular working hours. They don't map the standard 9 AM - 5 PM model, still, defining working hours will help you know when to start and when to finish! Although most people use some form of digital

calendar/planner, there are some that still use a physical planner. Find what works best for you.

## Task Management

Keeping track of your job tasks helps with planning and reporting and also simplifies answering the 'What's next?' question. In a simple, analog form, using notecards or PostIts can be a way to set up a To Do, Doing, and Done categories. Tools like Trello and Wunderlist make it easy to set up or update tasks, set due dates and reminders, and aggregate tasks into categories.

Limit your daily task load. When considering your well organized list of "To Do's" it is tempting to pile many things into your "Doing" list. You will be more efficient if you rather limit yourself to three or even better a primary and a couple of backups. This will ensure you focus rather than jumping across a larger number of tasks. Decide on your primary task for the day and try your best to get it done. The other two tasks for the day can be addressed after you complete your primary, or in the case that you get blocked.

## Hourly Employees

It is not unusual to have employees that will have a certain number of hours of work assigned and require some form of reporting on time-based effort. To track this, ask employees to provide a written report of hours and activities, possibly in spreadsheet form. There are also time tracking applications (e.g. Toggl) to simplify this process.

Note: Assure that remote workers are applying themselves to work related tasks after clocking in. Be clear about defining specific objectives to be met on a weekly or even daily basis to ensure touch points that validate progress and provide

notice of productivity slumps.

## Salaried Employees

For salaried employees, hours are not a critical metric for accountability: it becomes important to be clear about expectations for goals and timelines. Be clear about specific tasks that a remote worker needs to accomplish and the expected timelines to keep accountability expectations clear. Have good communication practices in place so that if the situation warrants, timelines can be adjusted.

## Managing remote employees

When managing remote employees, one of the biggest tasks is to have clear accountability measures in place. Make sure that employees understand expectations and have a clear means of reporting progress and setbacks.

Project Management Methodologies:

There are a wide range of project management methodologies in use today, many of which are variations on a theme. These methods for both remote and onsite workers provide

1. A clearly defined framework for defining expectations of progress.
2. A means to communicate progress and issues that need resolution.
3. Frequent (and expected) opportunities to ask for help.

The two of the most common project management methodologies are waterfall and agile.

# Waterfall

When to use	For projects that have a set of discrete, ordered steps that need to be followed.
Process Overview	Typically these projects are clearly defined before the tasks begin and all team members are all moving to complete one of the stages synchronously.
Benefits	Provides clear guidance to the team about project status: what is completed, what is the current task, and what comes next.
Drawbacks	Assumes the project works best in a linear, step-by-step progression, so going back to a previous step or working on multiple steps in parallel is not supported.
Best Practices	Everyone works on part of a single stage together, so communication about progress and blockers is required to keep the entire team moving forward.

# Agile (includes Scrum and [Kanban](#))

When to use	<ul style="list-style-type: none"><li>• Projects in which parts can be reworked and dependencies between parts are loose enough that they can be worked on in parallel.</li><li>• Good for projects where iterative improvements to different parts is possible or desirable.</li></ul>
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Process Overview	<ul style="list-style-type: none"><li>• Team members might be working on different stages of a project, so each member generally accepts one or a few specific tasks to work on.</li><li>• Periodic meetings are set to keep track of progress and identify bottlenecks as a form of team accountability.</li></ul>
Benefits	<ul style="list-style-type: none"><li>• Allows rapid delivery of functionality with subsequent improvement or upgrade of project parts.</li><li>• Can support parallel development of project parts to accelerate delivery.</li><li>• Planning requirements are less stringent than in a waterfall model.</li><li>• More flexibility in what tasks are worked on and previously completed tasks can be brought back for improvement.</li></ul>
Drawbacks	<ul style="list-style-type: none"><li>• The lower level of project planning needed for Agile makes it difficult to assess the actual time and effort required to complete the task.</li><li>• The ability to redefine and rework previous tasks can repeatedly shift delivery dates.</li></ul>
Best Practices	<ul style="list-style-type: none"><li>• Scrum is specific in its communication methods: daily ~15 minute meetings are used to keep the team in sync and assure that team members remain accountable and engaged.</li></ul>

# Time Management

## How to take control of your time

When we think about productivity, you shouldn't think about the hours in a day you spend "working" as a sign of productivity. Rather, you should consider the real signifier: the results of your efforts.

*I had to learn this the hard way: in my corporate job first, and in my first job later on, I worked longer and longer days, and went home with a feeling of not having accomplished much. I was playing the "busy" game, and feeling frustrated day in and day out. It's when I switched my thinking from cramming more into my day to setting my day up for success that things changed.*

In this actionable guide, we're going to look at how to focus on output rather than input. It's about how much work you get done, not how much time you spend working. To do that, we're going to break down how to get back in control of your available time.

## Know what you're trying to accomplish

If you're the CEO or founder of a growing business, you always have enough work to fill up your entire day. However, not all work is created equal. If you want to achieve more, then you should think about what, exactly, you're trying to achieve:

- What work is an immediate priority?
- What work should you contribute to now and finish later?

- What can reasonably be held off for now?

Clearly marking your goals allows you to set a map for the future, defining where you should focus your efforts. Otherwise, it's easy to get bogged down by whichever task catches your attention next, which can make it hard to achieve anything of importance.

For this first step, it's important to look at objectives instead of tasks: *"What are you going to finish?"* instead of *"What are you going to do?"* For example: You could decide to spend the morning checking and replying to your emails, or you could use the next 2 hours to finish the pitch deck to send to investors. In one case, you are starting from tasks hoping for them to move you in some direction; in the other, you are picking a clear outcome and focusing only on action that will take you closer to it.

In order to prioritize, look at those activities that would have the biggest impact on your business: like in a domino effect, they would have positive ripple effects on other areas of the business. Then, look for those activities only you can work on, so you can avoid duplicate work and make the most of every team member's contribution.

## List the activities you're working on

Now that you have figured out what your goals are, it's time to take a closer look at what you're currently doing with your day. List all the current projects you're progressing in, as well as the regular and recurring activities in your day. In this list, include the following:

1. Your work projects
2. Social engagements

3. Time spent learning
4. Time-wasting activities

If you compare that list to the goals that you're working towards, you're likely to see that your current workday is missing work towards those goals and that you could easily free up time to make room for it. Go back through the activity list and think about what you can cut from it to free up some time.

Activity name	Time in hours
E.g. Emails	3
Briefing the team	4
Lunch breaks	5
Reading	2
Communicating with suppliers	11

Your turn: Download [this template](#) so you can follow along with this exercise. It's a great way to realise how little we actually know about how we allocate our time, and to reconcile our actions with our priorities.

When I started my first business, I was working on a physical product, and all that mattered at that particular stage was to get a small prototype to test with potential customers, in order to validate the offer and also set up the manufacturing process. However, when I listed all the activities I was working on, I was shocked: I was spending entire days on promotion, outreach, planning, emails...all things that I couldn't really do much with anyway until I got the prototype ready. That's when I realized that 'hustling' was actually holding me back from my goals, and keeping me 'busy' on the wrong things.

## Track how you spend your time

For this step, you want to choose any regular work week where you expect to have as much free time as ever. Choosing a disruptive week, such as one with a conference or launch event, isn't going to work for our purposes. What we want to do here is keep track of how you spend your working day for a week or two. You can easily keep your own logs using spreadsheets or use a handy app like [Toggl](#), [Hours](#), and [Timeular](#) makes it a little easier to track your time.

<b>½ hour increments</b>	<b>Monday</b>	<b>Tuesday</b>	<b>Wednesday</b>
06:30	Get ready	Get ready	Get ready
07:00	Breakfast	Breakfast	Breakfast
07:30	Read	Read	Read
08:00	Family	Family	Family
08:30	Commute	Commute	Gym
09:00	Commute	Commute	Gym
09:30	Briefing	Supplier meet	Emails
10:00	Emails	Supplier meet	Emails

Keep your record or diary as honest as possible, and don't worry about writing down when you waste time. We're here for the insight, first and foremost.

## Go back and compare

When you have a week or two's worth of your working schedule, go back and compare it to the list of activities you think you get done on a daily basis. This step is likely to be a bit of a shock. Unless you're effectively managing your time already, there's a good chance you don't get as much work done in the day as you think you do. With the insight from your time-tracking efforts, update your daily activity list. Then compare that to the goals or high-priority work that you actually want to spend your time on. Figure out what low-impact activities you can cut from your current working schedule to make room for them.

This step can be a game changer: one of my business coaching clients realized that he wasn't allocating almost any time to his biggest priority: a new product launch. He was very frustrated and almost angry at first, but seeing what was actually going on allowed him to swap unimportant activities for others that would bring actual progress, and launch the product within a few months. That's the power of taking back control of your time.

## Set your week for success

Now that you have a better understanding of your working habits, you should be able to reconfigure them to allow for greater productivity. The most effective way to do this is to plan your day in advance by using time blocks. This means breaking your entire working day into clear, measurable blocks of time. Each block of time should have an objective or task tied to it, and you should be ready to devote the entirety of the block to that one task.

This should be done on at least a daily basis, with your time blocks set in place in the morning, right at the start of the day, or the night before. However, you can create a whole [Week Map](#), too, and standardize your weeks to be ready for success. Even if you can't define clearly what you'll be doing five days from now, you can set an agenda for the week that makes it easier to decide on the time blocks for each day.

Time blocks allow you to:

1. Prioritize the goals that matter to you the most.
2. Be realistic with your expectations of what you're going to get done during the day.

Any founder or CEO is going to be able to find overflow in their schedule; you are

going to have to skip some tasks to work on some others. What matters most is that you're spending time on what brings forward your business goals and objectives rather than busywork.

## Make sure the team is on board

Now that you have a clear goal to focus on, and a better understanding of how you spend your working day, you can improve not only your own productivity but the whole team's. Communicate with the team about the goals that you're going to be focusing on throughout the week. Foster a productive environment by encouraging them to make a habit of setting their own daily schedule as well.

If you're an employee proposing this new way of working, you may want to take small steps:

Step 1: Run an experiment yourself.

Step 2: Share the findings with your team or your manager.

Step 3: Propose to use these principles as a team.

This way, you are guiding everyone through the steps, instead of proposing something radical that might be met with a pushback. If you're an entrepreneur, CEO, or manager, get your team used to this new way of working by starting with 1-2 days a week, and then keep communication going within the team so that everyone can share progress and setbacks, and not feel like they're doing something wrong. This way, you'll empower your team to feel comfortable with a new way of working together.

The more people adopt the habit of dedicating blocks of time to specific tasks, the easier it will be to sync up with them, to avoid interrupting critical work that demands their attention, and to keep each other accountable to positive behavior.

Setting the example is the best way to get them following your lead, first and foremost.

## Your turn: Ready to take back control of time?

Increasing your output by mastering your time takes effort and thought, but in the end, the sheer increase in productivity is worth it alone. Think about it: would you invest a few hours of your time once to get back the equivalent of a day a week, every week?

That's the power of taking charge of your time and your actions: learn the habit of auditing your time now, and you will know how to work productively for the rest of your life.

# Manage misogyny in the workplace

## Align management with anti-sexism policies and practices

Require all managers to complete unconscious bias training that is grounded in specific scenarios they will experience in their role (hiring practices, gendered language, giving feedback).

- Include specific training on understanding microaggressions, how to receive feedback from teams and colleagues that calls them out for biased behaviors, and how they should identify and step in when they notice this happening.

Hold managers accountable to how they work with their teams by requiring [360 feedback](#). Include questions about whether their direct reports or colleagues feel:

- Safe and encouraged to have candid, open dialogue on gender diversity issues.
- If management provides guidance on how to improve gender diversity.
- If gender-biased language and behavior are challenged when they happen.
- If management works to ensure that diverse voices are represented in decision-making.
- Include the same 360 questions specific to manager performance in your

culture engagement surveys.

## Establish guardrails

Don't	Do
<ul style="list-style-type: none"><li>• Say you want to have gender diversity a priority, but don't include an intersectional group of women as part of your company's leadership.</li><li>• Put women in the position of taking on the emotional labor of raising the issues they face, only to act on changes when male leaders get involved.</li><li>• Expect this effort to happen naturally, or come from the bottom up. Misogyny will thrive when there aren't leaders in place to hold their teams accountable.</li><li>• Think that this is not as important as other business metrics you hold your organization accountable to.</li><li>• Think you are aware of how your employees understand or experience misogyny without</li></ul>	<ul style="list-style-type: none"><li>• Have women in leadership positions across the company.</li><li>• Believe and act on the pain points raised by your female (and female identifying) employees.</li><li>• Make all senior leaders and managers champions of diversity by holding them accountable to gender diversity goals in <a href="#">performance evaluations</a>.</li><li>• Set gender diversity as a company priority, with measurable metrics across your recruiting, hiring, and staffing efforts. Require leaders to treat it as imperative to business success.</li><li>• Set a baseline for where the company is by running an anonymous employee engagement survey.</li></ul>

having a safe way to collect their feedback.	
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Step	Best Practices
Ensure you have women in positions of leadership.	Not only should they be part of the leadership of your company because of their skills: they can also help identify how, when, and where these issues can be combated.
Make a gender-equal workplace a company priority, on par with other business metrics like revenue growth.	Without the issue being treated as a business level priority, you will not see employees at any level committed to changing behavior.
Document what respectful, anti-sexist behavior looks like for your employees and what the consequences are when those expectations are not met.	Talk about it again, and again, and again. Make this a topic of regular conversation, so that working through these issues becomes normalized.
Make your senior leaders and managers accountable.	Do 360 reviews and monitor gender diversity performance goals to ensure compliance.
Gather data on whether employees feel like the culture around them lives up to the values you talk about.	Regularly run anonymous employee engagement surveys (using <a href="#">this template</a> ) to set baseline action plans for what you will do with the results.

Regularly review your company policies to make sure they are in line with the values you talk about.	This includes employee handbooks, Terms of Service, promotional practices, etc.
Get help from outside the company.	If you don't have the expertise internally to develop equitable policies, manage engagement surveys, develop plans to measure growth over time, and hire someone to help (such as a Head of Diversity & Inclusion).
Have your male leaders publicly talk about their support of and belief in gender diversity.	Male allies are an important part of guarding against misogyny and affecting change.

### Make anti-sexism a company priority and part of your work culture

Step	Best Practices
Hire experts.	Hire experts that can provide guidance on policies that will work specifically for your business. Getting outside help can provide a mirror to your leadership team in ways that might be missed.
Be accountable to employees.	Use the results of your engagement survey. Report back to employees where you are at on actions needed progress regularly (quarterly): what you've implemented, what's in progress, and what's next.

Talk about it.	"See something, say something:" Make it safe for employees to call out biased language and behavior when they see it by holding managers accountable to providing an environment where this is expected, and offering public and anonymous forums for discussion.
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## Company policies

What gets measured and rewarded is what drives behavioral change across your company. When employees understand the expectations you have of their conduct, you can hold them accountable to it.

### What you should look out for:

- Does your company policy reflect the actions you want to see from all employees, including leaders, managers, and individual contributors? If it's not written down, employees are far less likely to engage especially since there isn't documentation to hold them accountable.
  - Are all candidates and employees evaluated and promoted based on the same criteria? Men are often hired and promoted based on their potential while women are often hired and promoted based on their track record.
  - Are the working norms across your company accommodating of working parents? Taking care of home life (things like childcare and caring for older parents) affect the perception of women's ability to handle the expectations of higher level roles or strategic projects.
  - Does your business strategy reflect the values you want represented by your employees? Don't ask your employees to act one way, then allow your customers to use your product in ways that contradict your internal values.
- [Wordpress.com](https://www.wordpress.com) and [Mailchimp](https://www.mailchimp.com) both list clear expectations for content not

allowed on their platforms in their acceptable use policies.

Policies	<ul style="list-style-type: none"><li>• Have a code of ethics for employees that sets clear guidelines for what collegial and respectful behavior looks like as well as unacceptable and uncivil behavior. Be clear in the consequences for demonstrating unacceptable behavior.</li><li>• Require acknowledgement and training on your code of ethics, and set periodic reminders to review with old and new employees.</li><li>• Have a set of values and ethics in place to use for how your customers use your products. Reflect those values in your terms of service and strategic business direction. Use these values when making hard, nuanced decisions about company direction.</li></ul>
Hiring	<ul style="list-style-type: none"><li>• Use tools like <a href="#">Gender Decoder</a> to remove gendered expectations and language from your job descriptions.</li><li>• Use tools like <a href="#">TalVista</a> to give you a “blind” resume reading experience to reduce bias when reviewing resumes.</li><li>• Standardize interview questions and feedback loops, focusing on the qualifications that have a direct impact on performance</li><li>• Set diversity requirements for each state of the application pipeline.</li></ul>

<p>Promotions and compensation</p>	<ul style="list-style-type: none"><li>• Hold managers and senior leaders accountable to gender diversity (e.g., for their consciousness of gender in their performance evaluations).</li><li>• Make career ladders, promotional practices, and compensation policies publicly available to all employees.</li><li>• Make promotional ladders, specifically for leadership roles, focused on outcomes (not potential) to level the playing field for women and female-identifying employees.</li></ul>
<p>Training</p>	<ul style="list-style-type: none"><li>• Provide unconscious bias training to all members of your organization. Systemic sexism is hard for many to identify, let alone know how to push against.</li><li>• Give all employees to tools the need to understand what bias is, why it is important to identify, how it takes shape in the workplace, and how they can adapt their behaviors. LeanIn has a <a href="#">free version and guide to using it</a>.</li><li>• DON'T: let this training be high level. Capture specifics around subtle or complex instances of bias.</li><li>• Coach employees on ways to respond to feedback when they are called out for exhibiting biased behaviors. The response to that feedback needs to be an openness to hearing that they misstepped, not defensiveness, and a desire to educate themselves on how to change their</li></ul>

	<p>behavior.</p> <ul style="list-style-type: none"><li>• DON'T: put the emotional labor on women to explain how those they are sharing feedback need to make changes.</li></ul>
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## Support employee's lives at work

Societal expectations of women affect their ability to actively participate in the workplace, causing them to often be held in comparison to men who do not have similar expectations. Things like childcare, household work, taking care of aging family members, and more, still disproportionately falls onto the plate of women. Create role expectations and policies that allow women the flexibility to fit work into their lives.

This could include:

- Telecommuting / remote working policies (that allow flexibility in taking care of home emergencies).
- Emergency backup child-care services.
- Programs to smooth transition to and from extended leave.
- Company subsidized or on-site regular child care.
- Provision of a selection of feminine hygiene products in company bathrooms (for free).
- Insurance coverage for gender reassignment surgery (including everything from therapists, to hormonal treatments, to surgery).
- Medical insurance for any and all family planning options (including coverage for egg freezing, IVF treatments, pregnancy prevention procedures, and all other forms of birth control).
- Offer family leave policies that extend beyond legal requirements (including time off for those who become parents by traditional and non-traditional

means–adoption, fostering, and surrogacy).

# Section 3: Employee Retention

## **Topics Covered;**

- Managing regretted turnover
- Assessing employee engagement in your org
- Retention bonus agreement
- Assessing the risk of employee churn and its causes

# Prevent regretted employee turnover (RTO)

## Why employee turnover doesn't cut it as a KPI

There can be lots of reasons why people leave organizations:

- They're terminated.
- They resign.
- They retire.
- They decide to get their professional degree.
- They decide to become a stay-at-home parent.
- They're not bad enough to terminate but they're not good enough to promote and they've plateaued professionally and then bypassed by more promising talent.

All of these circumstances count as "turnover." It's typical for organizations when measuring turnover to group all of these reasons and to see them as equal, but what this amounts to is mostly meaningless data: the reasons listed are not equivalent in impact.

**Turnover actually says very little about your organization:** it's too easily influenced by what is going on in the economy (a hot job market produces higher turnover) and can be a function of how good you are at recruiting the right candidate (hiring a poor fit produces more turnover). Turnover data is itself deceptive. For example: If you run a call center, turnover can run as high as 200%. On the other hand, if you experience a turnover rate of 20% among your developers, that's probably a crisis. Having a turnover rate for the entire company that combines that call center turnover with the developer losses won't lead you to make the right key decisions.

**Stop measuring turnover**, especially for the entire organization, and **start measuring Regretted Turnover (RTO)**.

## What is regretted turnover?

**Regretted turnover involves people who leave, you didn't want them to leave and you didn't have plenty of advance notice they were leaving.**

### Counted in RTO data:

- People who you didn't want to lose but they're leaving and you didn't have plenty of notice (e.g., 2-3 months) they were leaving.

### Not counted in RTO data:

1. **People who you want to keep but you know are leaving.** This includes scenarios where you have advanced notice, such as:

- An employee gives you six months advance notice they're leaving for a graduate program and you have an opportunity to groom a replacement.
- An employee who is retiring at a pre-set date who you don't want to lose but again, you have advance notice.

2. **People who you are separating with but you don't see their departure as a significant loss** (they're either easily replaced or they weren't a key performer).

RTO is only useful when it is consistently defined.

**It's important to understand the distinction between who is and isn't eligible for RTO status.** If your organization is going to move from measuring turnover to instead tracking regretted turnover, you need to make sure everyone capturing data is capturing the same data. Consider the following:

- The Asia-Pacific Division Director defines RTO as **"everyone who left that we didn't terminate."**
- The US Division Director defines RTO as **"people we didn't want to lose, even if we had advance notice they were leaving."**
- The Europe Division Director defines RTO as **"people we didn't want to lose and didn't know they were leaving."**

Due to the varying definitions of regretted turnover, the company is going to end up with an inaccurate data set. It's critical to make sure that everyone collecting data on RTO is aligned around the same definition.

It's often very easy for organizations to encourage poor performers to leave but officially the manager will say it was the employee's decision to leave and the company will miss them—thus making it seem like it's RTO.

Don't confuse a public PR stance with the actual evaluation of the employee and your organization's standard for what constitutes RTO.

### **Why care about regretted turnover?**

Your organization will always lose people you don't want to lose. But when you have advance notice (because someone is retiring or staying home to raise children or making some other career altering decision), your business has an opportunity to plan for that change. You can:

- Start [sourcing](#) for replacements.
- Groom replacements in-house.
- Look to offshore that work.
- Change the nature of the role or position so you can more easily find a replacement that works.

Those losses are tough but you have time to adjust. And there will always be people who leave who were solid performers—but are easily replaced and their departure isn't a significant hiccup to your business. In fact, **turnover like that can often be useful because it leads to an infusion of new talent and fresh insight.**

The turnover that actually matters is when it involves good performers (those who are difficult to replace with someone equal or better) and we don't have enough advance notice.

Measuring and understanding regretted turnover in your organization is very revealing. It can:

- Identify ongoing issues with engagement or a specific manager.
- Tell you if you're not competitive with benefits, wages, or work environment with your competitors.
- Help you identify problems that may be obstacles to critical objectives.

- Help you be strategic with your human capital.

You don't have enough resources to do everything you want, so you want to focus on critical people and the ones most at risk. RTO metrics help you identify those kinds of problems and issues.

### **What regretted turnover tells you**

**Regretted turnover tells you where we have critical issues.** For example, if the overall turnover rate for your company is 8% and the sales team has an 8% turnover rate, nothing seems to be amiss. But if you're measuring RTO and it's 2% for the company and 8% for the sales team then you'd sit up and take notice. At a minimum, you'd want to know **what explains that difference** (e.g., why are you seeing a higher rate of turnover among sales team members that you don't want to leave—what is going on?) Realistically, RTO rates will rarely be consistent across the entire company and across all teams so you'll always see some differentiation.

### **What does differentiation tell you**

#### **1. It's the manager**

There are lots of reasons for regretted turnover that would explain why one team or unit has a higher rate. For example, while we commonly talk about an "organizational culture," the reality is that **every organization has subcultures**. So while your organization may seek to have an inclusive culture that accepts and acknowledges diverse performers, you may also have teams with sub-cultures that reward conformity and homogeneity or discourse some key corporate values (thus encouraging good performers to leave the company).

There is a frequent saying within the Human Resources field: 'People join companies and leave managers'. - Joe Willmore

When some teams or business units have higher RTO rates, you'll want to take a closer look at their managers. Google found with Project Oxygen that managers that score lower on both employee evaluations and peer/management

performance assessments also had employees with significantly higher RTO rates. A higher RTO does not mean the manager is a bad apple—RTO could be due to other factors. But looking at the manager is always a good place to start. You may have managers (because of their higher RTO rates) that are costing your company money and making work for your talent acquisition team.

## **2. It's a lack of engagement (autonomy, purpose, and/or mastery).**

There is a tendency to assume that if you've got a lot of regretted turnover in particular departments, **it must be a function of pay and benefits. This is not an accurate assumption.** If engagement scores are generally high across the company, pay and benefits usually isn't sufficient to encourage good performers to jump ship. Daniel Pink argues that, for engaged performers, other factors (**like autonomy, purpose, or mastery**) are what make the difference.

If you have any kind of human capital analytics program, you can look at the data to see what common factors are driving your regretted turnover. This kind of analytics data may also **help you to identify predictive elements** that suggest who is likely to leave in the future (so you can either take steps to reduce the likelihood of those performers leaving or you can work to mitigate the impact of their departure).

For example: Imagine that you looked at employees over the past two years who fell into the RTO category and discovered the following characteristics:

- Didn't participate in company **giving or charity events** in the past year.
- Didn't qualify for a **performance bonus**.
- Didn't participate in the **company blood drive**.
- Maxed out their **personal time off last** year.
- Worked for a **manager who rated in the bottom 20%** of the company.

Now suppose that 75% had shown **at least three** of the following five characteristics. None of those factors by themselves could constitute a reason an employee chose to leave, but they can become leading indicators when combined. ***If you identify a pool of current employees who share most of those characteristics, you need to look at steps to mitigate the risk of regretted turnover.***

## **Maximize insight with regretted turnover data**

### **1. Segment data**

Once you've begun to measure regretted turnover, segment your data (e.g., identify critical roles or teams and then look at RTO for those roles). You may not want to lose valuable performers in operations but if you've got a good bench, you can weather their loss. But if you're thin with engineers or it's critical to keep your best sales staff, then segmenting RTO allows you to focus on the strategically critical roles (e.g., the ones that will make or break your business and determine if you hit your strategic priorities).

Segmenting makes even more sense when you realize you may not have enough resources to plug all the holes or fill every position. If your Developers are critical to your business success and your RTO in that role is high, knowing your regretted turnover rate for that role will push you to take corrective steps to either prepare for those losses or find a way to correct the problem. So to take your RTO analysis to the next level, segment: identify which teams or units are the most critical to your business and then look for regretted turnover.

### **2. Look at tenure**

An additional way to segment RTO data is to observe tenure. Most regretted turnover will happen in the first two years of employment (and for IT roles, even less than two years). Typically what explains this is that a new hire discovers things don't match their expectations. If you discover you've got a jump in RTO among employees who've been with you five years or longer, that's a data point

that should be a little scary. It points potentially to several interrelated structural issues:

1. **You may have a dysfunctional culture.**
2. **Employees may feel plateaued (e.g., unable to progress).**
3. **Employees are unhappy with the direction of the company (particularly if there is a new initiative).**
4. **You've got an engagement issue.**

### **How to address regretted turnover**

So you've started tracking regretted turnover data—what next? There are a couple of different things to do with this information.

#### **1. Conduct root cause analysis with RTO data.**

Many management teams assume that regretted turnover is a function of pay and benefits. Don't fall into that trap. And don't fall victim to confirmation bias either. In exit interviews, employees find it easy to say that it's a matter of pay or benefits. Look at your metrics associated with the regretted turnover—what do all these employees have in common? Look at comparisons with competitors. Even if your existing talent says it's about better pay or benefits, if the competitor isn't consistently paying above the industry standard and talent is still staying there then you know it's about more than pay or benefits.

#### **2. Look at engagement.**

There are a lot of factors that contribute to engagement. So it's a mistake to assume that your corporate engagement levels are all due to one factor. But what is generally true is the more engaged a performer is, the less likely they are to become an RTO statistic. So monitoring engagement scores can help you stay ahead of regretted turnover.

#### **3. Use stay interviews.**

Stay interviews can be conducted in three ways:

1. **All new hires get a stay interview within their first six months on the job** to see how well their experience is aligning with their expectations.
2. **All employees (or at least those in key roles) get a stay interview annually.**
3. **Lay out a series of topics and make it clear to each manager that they're expected to know the answer to each of those questions for every employee on their team.** (Note: In this case, the stay interview would probably be more informal: a manager simply makes it a point to weave these topics into other conversations with the employee.)

### **Helpful analytics for calculating regretted turnover**

It's important to have a consistent and aligned definition of what you mean by RTO: it's not just everyone who leaves that wasn't formally fired. But there are other metrics that can also help you get important insights about regretted turnover in your organization.

1. **Identify common traits that most of your RTO performers share.** A lowly rated manager, unpopular project, or dysfunctional culture in a specific team will allow you to anticipate future problems and act to reduce regretted turnover in the future.
2. **Connections to managers matter.** Determine if particular managers are driving most of the RTO in your organization.
3. **Determine if most RTO happens within a specific employment timeframe.** For instance, if 70% of your RTO happens to new hires (in their first six months) than there's a good chance your talent acquisition team is making unrealistic promises in a desire to quickly fill positions (which actually makes things worse—you go through the time and cost to fill a position only to have to fill it again in six months).
4. **Determining the cost of RTO for your organization is a useful data point.** At a minimum you should be able to determine what it costs to recruit and

then fill a specific critical position (let's say a webmaster). With a little more work, you can identify how long it typically takes to get this performer up-to-speed. This data on the cost of RTO can help you get:Senior management's attention because this is money walking out the door every time you have regretted turnover.Managers to understand how critical it is to anticipate problems and try to develop fixes rather than let it escalate to the point that a valued employee walks. Managers continually pressure recruiters to fill positions ASAP. But if the cost of this is to fill a critical position with someone who is going to leave in six or nine months, it makes more sense to wait a little bit longer to get the right fit. Or work even harder to prevent good talent from leaving.

## **How to improve regretted turnover numbers**

If you've got too much RTO, especially in key areas, what can you do to reduce it? Your answers (and there are usually multiple actions you'll need to take) start first by understanding why you've got high RTO. Do not automatically assume you're going to fix this by raising pay or benefits.

### **1. Look at the relationship with the manager.**

The most long-lasting way to reduce RTO is to improve the work relationship between performers and their team lead or manager. This is not about friendship: it's about how effective the manager is, if they do a good job bringing out the best in the performer, if they make their team a desirable place to work.

### **2. Get ahead of the curve.**

It's too late to address RTO when you have employees telling you "I've got an offer from X and I'm thinking of taking it," so you get involved in bidding wars to keep valuable talent. You need to identify when people are starting to get an itch to go elsewhere before they make that decision or return the call from that headhunter. Two things are critical here: **first, stay interviews and second, identifying leading**

indicators and metrics for RTO. You need to be addressing potential RTO before employees are dissatisfied.

### **3. Start with the critical roles first.**

You may consider every employee valuable but some have more impact on the business than others. Identify the critical roles and make sure you have a good sense of how those performers are feeling. Are they happy campers? Or are they grumbling and uncommitted?

### **4. Check your talent acquisition process.**

In the rush to fill positions, a recruiter will sometimes pick someone who is prone to leave and isn't really excited about your firm or the work--this is just a raise in pay for them (and they'll jump ship at the next opportunity to get another bump in pay). It's better to leave a position vacant an extra month to make sure you find the right person than to be in a rush to fill it (with someone who will be quick to leave so you'll be stuck filling the position again in 6 months). If your recruiters are over-promising or creating unrealistic expectations, this will show up in stay interviews in the first 6 months. [Link to How to hire a recruiting firm]

### **5. Build engagement.**

The more engaged employees are, the less regretted turnover you'll have.

### **6. The more committed performers are to the mission or purpose of the organization, the lower your RTO will be.**

So building in "line of sight" (so workers see how their job affects the end result) or having something that makes the world a better place or just doing a better job selecting talent interested in what you're doing--all of that will contribute to lower RTO.

# How to assess employee engagement in an organization

## Process Overview

There's lots of talk about employee engagement. A lot of people presume to know what it means and so are remarkably imprecise when asked to define it.

In this article, we will look at:

- **What engagement is.**
- **Why engagement matters.**
- **What contributes to engagement.**
- **How to measure engagement.**
- **How to improve engagement within an organization.**

## What is employee engagement?

Employee engagement reflects employee commitment. It is the extent to which employees believe in what they do, feel valued for doing, and how much intellectual effort they are willing to spend to make a company successful.

Engagement is not about morale or how happy people are at work:

- You can enjoy coming to work yet still be uncommitted.
- You can have an optimistic personality yet not really be passionate about the job.
- You may really like the perks you have yet not to be invested in the success of the business or care about the company.

This is why:

- Climate/morale surveys don't assess the level of engagement.
- Bonuses, benefits, and additional perquisites don't necessarily result in higher levels of engagement.

## Why does engagement matter?

Most people understand that it's a good thing to have employees committed to their work. But what does this mean in practice?

A number of sources from Gallup to Towers Watson have found that employees with higher engagement levels tend to believe that what they do makes a difference.

Highly engaged employees are less likely to become regretted turnover candidates. A highly engaged employee is more likely to work longer hours (though keep in mind, the inverse is not true—someone who works longer hours isn't automatically highly engaged) and is more likely to take initiative. Employees with lower engagement scores are more likely to leave the company and to produce less or perform at lower levels while they remain an employee of the company.

## What contributes to engagement?

Engagement is more than just being happy at work or liking your team members. Daniel Pink argues that engagement is a factor comprised of three elements:

<b>Autonomy</b>	The more control and micro-management, the more you potentially contribute to lower engagement levels.
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<p><b>Mastery</b></p>	<ul style="list-style-type: none"> <li>● Recruiting talent interested in not just getting better but driven to advance their technical skillset (e.g., continuously learning, surpassing job requirements, willing to test themselves).</li> <li>● Work environments that encourage getting better and reward continual learning.</li> </ul>
<p><b>Purpose</b></p>	<ul style="list-style-type: none"> <li>● Feeling like what you do has a real impact on whether the company succeeds or fails.</li> <li>● The difference between perceiving your work as "a job" versus your work as "a career" or "a mission" or "a calling."</li> </ul>

From these three factors, it should be obvious that someone’s manager has a big impact on their engagement level: someone who micromanages or focuses on just getting work done (versus getting better) will generally produce team members with lower engagement levels. It is recommended that expectations, feedback, and development be shared (and consistently discussed) between employees and management from the very beginning.

To ensure this communicative cadence, check out these discussion guides:

<p><b>Expectations</b></p>	<ul style="list-style-type: none"> <li>● How to discuss expectations to employees (as a people manager)</li> <li>● How to discuss expectations to people managers (as an</li> </ul>
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	employee)
<b>Feedback</b>	<ul style="list-style-type: none"> <li>• How to give feedback to employees (as a people manager)</li> <li>• How to give feedback to people managers (as an employee)</li> </ul>

<b>Development</b>	<ul style="list-style-type: none"> <li>• How to discuss an employee's development (as a people manager)</li> <li>• How to discuss your development with a people manager (as an employee)</li> </ul>
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**How to measure or track engagement**

“Are you engaged?” This question usually doesn’t provide useful data since it’s too broad. The engagement levels of team members will be shaped by a range of factors. Based on research by Gallup, SHRM (Society for Human Resource Management), HCI (Human Capital Institute), and Korn Ferry, there are certain metrics that can help you determine how you’re doing with engagement.

<b>Clarity of expectations.</b>	To what degree do employees feel they have a handle on the work, the performance standards, and perceive a chance of success?
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<b>Opportunity for development.</b>	This is more than just whether or not there's any available training: do performers believe they're going to grow on the job?
<b>Utilizing their strengths.</b>	To what extent do employees enjoy using their skills or deploying their technical strengths in the work they do?
<b>Relationships.</b>	Gallup in particular likes to ask about how strong are the key relationships. This is not about whether or not the team is cohesive or gets along. Rather, it asks whether or not there is a professional relationship with high trust (e.g., the employee couldn't see leaving the company because they'd sever that relationship).
<b>Necessary support.</b>	Do employees feel work in a work environment that has the systems and facilities they need to succeed?
<b>Managerial relationship.</b>	How strong is the respect and interaction with their manager?
<b>Importance of the job.</b>	Do they feel what they do matters and is there "line of sight" between their role and a larger organizational outcome?

## Tools to assess engagement

There are plenty of firms that specialize in engagement surveys, implementing them, and taking the requisite action. Depending on the size of your org, either a corporate engagement survey (for larger orgs) or an employee engagement survey (for startups and growth level companies) is done once a year or every 15 to 18 months.

Since that 12 to 18 months is such a long time, you'll need to look for other ways to double-check what is happening with engagement. There are a range of tools you can use (some more quantitative than others):

Pulse Surveys and 360 Degree Surveys	Typically these are shorter than engagement surveys and are a way of determining if you need to dig deeper.
An informal department (or team-specific) survey	Each month you can do a focus-group or "Pizza with HR" session that allows you to dig deeper with a specific work team or unit that may have given some hints they have engagement issues. You can avoid "survey fatigue" by rotating departments or units.
Exit Interviews and Employee Resignations	<ul style="list-style-type: none"><li>● Look for themes, particularly if you have a spike in regretted turnover for a specific work unit or team.</li><li>● Tip: If your HR team is too busy to take this on, sign-up an intern to do this task. This will look terrific on the resume of most social science majors graduates: they'll likely have quantitative and qualitative research background they bring to the task and you won't tie up a</li></ul>

	critical internal resource wading through a year’s worth of exit interview notes.
Stay Interviews	Check with people while they’re still on the team to look for hints of trouble. This is a particularly good tactic to try with new hires—people who are new to the organization often see things that veterans have become oblivious towards (so don’t accept the “I’m still new here, I’m not sure I’d have anything of value to add” excuse).
Regretted Turnover	Look for trends within your RTO data to see if some things appear to be going up or down.

## Strategies to assess engagement effectively

Just because you have some kind of engagement survey doesn’t mean you’re doing it effectively. Consider these issues when pursuing any kind of engagement effort at your business.

<b>Don’t rely solely on engagement surveys for your data.</b>	<ul style="list-style-type: none"> <li>• You’ll either create survey fatigue or you’ll have huge gaps between the snapshots of data you do collect.</li> <li>• Look to utilize a variety of ways to collect engagement input.</li> <li>• Note: A “suggestion box” is generally an ineffective idea (in fact you may get more insight by the lack of suggestions than you</li> </ul>
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	do from what is actually submitted).
<b>Look to segment the response data.</b>	<ul style="list-style-type: none"> <li>• Viewing engagement across the entire business (especially if you're big or geographically dispersed) isn't as useful since it won't allow you to see if you're making progress with the Operations team or the IT unit.</li> </ul>
<b>Once you've done an engagement survey, put out some kind of follow-up report quickly.</b>	<ul style="list-style-type: none"> <li>• Even if the report is just "Thanks to everyone for participating, there's a lot of data, we've put a team together to analyze it, we'll have a report on initial findings in one month."Note: Do not do a survey and then wait until you've analyzed it completely, management has reviewed it, and you've decided how to communicate it before you then share it with the business.</li> </ul>
<b>Take action quickly.</b>	<ul style="list-style-type: none"> <li>• To do this, you may have to have a series of rolling or sequenced reports. At a minimum, report initially on the creation of a team to analyze and recommend actions shortly after the survey is completed. This can be as simple as announcing you've put a team together to review themes and identify priorities from the survey, and there will be periodic updates to keep everyone informed.</li> </ul>
<b>Keep people updated on actions and</b>	<ul style="list-style-type: none"> <li>• When you implement programs</li> </ul>

<p><b>progress.</b></p>	<p>or new policies, tie them to the engagement data. For example: "As you recall from our engagement survey we saw an issue with inclusion. So part of the rationale for this new policy is based on what you told us six months ago and also...etc. etc."</p>
<p><b>Higher engagement numbers are <u>not</u> the objective.</b></p>	<ul style="list-style-type: none"> <li>• You care about engagement because it benefits the business. You want higher engagement because it pays off in some fashion (better quality, less regretted turnover, higher productivity, better talent attraction, etc.). Identify how engagement benefits your specific business (it will vary from company to company) and look for how those results change when engagement numbers change.</li> </ul>
<p><b>Look for ways to make engagement information as transparent as possible.</b></p>	<ul style="list-style-type: none"> <li>• Within limits.</li> </ul>
<p><b>Build in accountability.</b></p>	<ul style="list-style-type: none"> <li>• If your engagement data indicates that employees want more line-of-sight, then hold them responsible for taking initiative or identifying areas where this can happen.</li> <li>• Engagement data collection is not a justification to vent: you're asking people to share insight and then commitment to acting on those issues they identify.</li> </ul>

# How to improve engagement in an organization

Once you identify you've got an engagement issue, you want to find out at least two things.

## 1. How are the engagement levels affecting the organization?

Are you seeing higher regretted turnover? You need to identify how low engagement levels manifest themselves in your business. For example, if your developers have low engagement levels, how is that showing up? Does it mean you have to pay them 15% above the market to keep them? Or they're sloppy (so more rework and quality control is necessary)? Or they don't put out during crunch time?

## 2. What is driving the low engagement?

If it's about bad managers then you have a target to go after. If the root cause is that people don't care about their work, you need to find some way to get them passionate about it again. For example, take on volunteer efforts as a company that energizes your people and makes them proud about where they work. Are their independent projects you can give them comp time to take on? Can you try something like Atlassian where they give employees paid time to focus on their own initiatives (as long as they share results with the company)? Or is it that people don't see how their work matters (e.g., you need more line-of-sight)?

## Remember

- **If you're trying to get engagement with bonuses and benefits, those can usually be matched by competitors.** These are essentially bribes: they

don't build engagement: they only entice someone to stay a little longer before they eventually jump ship.

- **Understand what matters to your people.** Gallup found that a critical factor that discourages most key employees from leaving is an unwillingness to say goodbye to a good work-friend or esteemed colleague: fostering environments where coworkers have opportunities to bond before, during, and after work is a best practice.

## - Retention bonus agreement

### Generic Retention Bonus Agreement

<<Date>>

<<Employee Name>>

<<Address>>

As you may know, we consider your continued service and dedication to <<Company Name>> essential to our business. To induce you to remain employed with <<Company Name>>, we are pleased to offer you a retention bonus, as described in this letter agreement.

In recognition of your continued service with <<Company Name>> through and until <<2nd Date>> (the "**Retention Period**"), we are offering you a retention bonus in the amount of <<Dollar Amount>>, less all applicable withholdings and deductions required by law (the "**Retention Bonus**").

You will be eligible to receive this Retention Bonus if all of the following eligibility criteria are satisfied:

1. Your performance has been satisfactory, as determined in <<Company Name>>' sole discretion, from the date of this letter agreement through the end of the Retention Period.
2. You are actively employed by <<Company Name>> on the last day of the Retention Period.

3. You have not given notice of your intent to resign from employment on or before the last day of the Retention Period.
4. <<Company Name>> has not given you notice of its intent to terminate your employment on or before the last day of the Retention Period; provided, however, that you will be eligible to receive a pro-rata portion of the Retention Bonus if <<Company Name>> and/or gives you notice of its intent to terminate your employment other than for your violation of a <<Company Name>> policy, as determined in <<Company Name>> sole discretion, on or before the last day of the Retention Period **and** you satisfy all of the other eligibility criteria.
5. If you are eligible to receive the Retention Bonus and sign and return this letter agreement to <<Appropriate Manager>>, within five (5) days of receiving this letter agreement, it will be paid to you in two payments, <<First Payment>> on the next regularly scheduled pay date following <<Date>> and the remaining <<Second Payment>> next regularly scheduled pay date following <<2nd Date>>; provided, however, that you acknowledge that you will not earn the Retention Bonus until the end of the Retention Period and if your employment with <<Company Name>> ends before the close of the Retention Period, you agree to re-pay to <<Company Name>> a pro-rata portion of the Retention Bonus within fifteen (15) days after the termination of your employment

**Your employment remains at-will, meaning that you and PLH Group may terminate the employment relationship at any time, with or without cause[, and with or without notice.]**

This letter agreement is intended to comply with, or be exempt from, Section 409A of the Internal Revenue Code of 1986, as amended ("**Section 409A**") and shall be construed and administered in accordance with Section 409A.

This letter agreement contains all of the understandings and representations between <<Company Name>> and you relating to the retention bonus and supersedes all prior and contemporaneous understandings, discussions, agreements, representations and warranties, both written and oral, with respect to any retention bonus; provided, however, that this letter agreement shall not supersede any other agreements between <<Company Name>> and you, shall remain in full force and effect. This letter agreement may not be amended or modified unless in writing signed by both the <<Appropriate Manager>> and you.

This letter agreement, for all purposes, shall be construed in accordance with the laws of <<State>> without regard to conflicts-of-law principles.

We look forward to your continued employment with us.

Very truly yours,

<<Company Name>>

Agreed to and accepted:

\_\_\_\_\_

<<Appropriate Manager>>

<<Title>>

Date: \_\_\_\_\_

\_\_\_\_\_

<<Employee Name>>

<<Title>>

Date: \_\_\_\_\_

# - Assessing the risk of employee churn and its causes.

How to understand your risk of employee churn and its causes

## Process Overview

Feedback in general is a great way to learn what's working and what needs to be tweaked. When it comes to understanding the risk of voluntary attrition and undesirable turnover, focus on the 3 C's:

- **Culture**
- **Compensation**
- **Career**

Results for activities in all three of these categories will ladder up to areas of improvement, focus or research in hiring, onboarding, learning and development, employer branding, benefits, training and other departments. In other words, the 3 C's can affect every aspect of the business.

## Culture

Culture matters, and that includes overall company culture, team and project culture, and leadership culture: it's how you communicate and set expectations and how you articulate your mission and vision. We all want purpose and to know that our work is meaningful: making sure our values and align with an organization's is a huge factor in job satisfaction.

## Questions to ask:

- How do you articulate your organization's sense of purpose?
- Do employees understand and share company values, mission, and sense of purpose?
- Do you cultivate a culture of learning?
- Are employees encouraged to ask questions and speak up?
- Is there a culture of trust at your organization?
- Do you promote health and wellness?

- How do you promote work-life integration?

## **Activities to consider:**

- Engagement survey
- Culture/morale-focused survey
- Focus Groups (e.g., by level, team, or department; cross-section of all levels, specific to region, etc.)
- Feedback loops (e.g., surveys after meetings or events)
- Culture taskforce or committee
- Delivery team one-on-ones (e.g., what are some common challenges for teams? Are they seeing burnout at certain times? How are they handling stress or deadlines?)

## **Focus on culture when:**

- You want to get a general idea of how people, in particular a subset of people (POC, women) are feeling.
- You want to set a baseline for future activities.
- You'd like to expand your current employee programs.
- You're going through a process of articulating your purpose or mission.
- You're considering changing benefits, PTO, WFH, or other policies that affect how people work.

## **Compensation**

Money talks, but it doesn't have to monopolize the conversation. Employees look at total rewards when considering overall satisfaction with their compensation. Health benefits, wellness programs, PTO/sick leave, equity, 401k programs and work from home/flextime policies have a voice in the compensation dialogue.

## **Questions to ask:**

- Are your salaries competitive?
- What does a total rewards package look like for your employees?
- Do you have any non-monetary benefits or a rewards program?
- Do you have a WFH/flex time policy?
- Do you encourage employees to take PTO?
- What's your compensation strategy (e.g. performance-based? Tenure-based?)
- Do you have a bonus program?

## Activities to consider:

- Engagement survey
- Focus Groups (e.g. by level, team, or department; cross-section of all levels, specific to region, etc.)
- Compensation analysis
- Benefits analysis
- Attrition/retention data analysis (stay and exit interviews)
- Hiring Manager/Recruiting team one-on-ones (e.g. what roles are difficult to fill? Why? What are your recruiters hearing from candidates? How much are they negotiating? What are they negotiating?)

## Focus on compensation when:

- You want to develop or refine your comp strategy.
- You're having a hard time attracting candidates.
- You're having a hard time retaining employees, particularly at a certain level.
- You're considering changing benefits, PTO, WFH, or other policies.
- You want a general sense of employee satisfaction.
- You're refining the promotion process.
- You're creating a hiring plan for the upcoming year(s).

## Career

Opportunities for learning, growing, and advancing are critical to employee satisfaction and productivity. Stretch roles, job shadowing, HiPo programs, learning and development activities, and regular one-on-one conversations about goals and expectations allow employees to see different paths in front of them, giving them a chance to use their strengths and develop their potential. Remember: if there is no place to go, there's no reason to stay.

## Questions to ask:

- Is there a clear path forward for your employees?
- Are role expectations clear?
- Are employees having regular conversations with their managers?
- What's your performance management process like? Can it be improved?
- Do you have a mentor program?
- Do you have a High Potential (HiPo) program?
- Are employees encouraged to take on stretch roles?

## Activities to consider:

- Engagement survey
- Focus Groups (e.g. by level, team, or department; cross-section of all levels, specific to region, etc.)
- Manager Forums
- Attrition/retention data analysis (stay and exit interviews)
- Hiring Manager/Recruiting Team 1x1 (e.g., what roles are difficult to fill? Why? What are your recruiters hearing from candidates? How much are they negotiating? What are they negotiating?)
- Career development analysis (e.g., performance management process, goal-setting)
- Talent gap analysis
- Leadership Development Program
- Manager Training Program

## Focus on career when:

- You want to get a general idea of how people are feeling.
- You're having a hard time retaining employees.
- You're creating a hiring plan.
- You're considering changing benefits, PTO, WFH, or other policies that affect how people work.
- You're expanding L&D programs or budgets.

## How to design approaches to employee churn

When designing any of these approaches, keep these points in mind:

Don't	Do
<ul style="list-style-type: none"><li>● Assume you know what's working and what's not.</li><li>● Focus on just one type of activity.</li></ul>	<ul style="list-style-type: none"><li>● Include employees in the process, whether it's helping pinpoint areas of focus, contribute to questions or categories to ask, or having them champion the process. Including them in the process makes them both invested in</li></ul>

	<p>and accountable for improvements</p> <ul style="list-style-type: none"> <li>• Take a look at your hiring practices and processes.</li> <li>• Think about how you can acknowledge and reward employees.</li> <li>• Use a combination of surveys, focus groups, programs and other activities to get a holistic view of what's going on in your company.</li> </ul>
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## How to execute approaches to employee churn

When executing on any of these approaches, keep these points in mind:

<b>Don't</b>	<b>Do</b>
<ul style="list-style-type: none"> <li>• Assume you know what's working and what's not.</li> <li>• Focus on just one type of activity.</li> </ul>	<ul style="list-style-type: none"> <li>• Consider what you can do short and long term.</li> <li>• Collect feedback frequently.</li> <li>• Create a feedback loop.</li> <li>• Communicate frequently to employees regarding findings, next steps, and opportunities for improvement.</li> <li>• Get employees involved in change.</li> <li>• Use a combination of surveys, focus groups, programs and other activities to get a holistic view of what's going on in your company.</li> </ul>

# How to write and implement engagement surveys

When it comes to writing and implementing engagement surveys, keep these points in mind:

Don't	Do
<ul style="list-style-type: none"><li>● Create surveys that take more than five minutes to complete: You should have between 5-15 questions depending on how often you plan to send them (e.g. biweekly: 5 questions; quarterly: 15 questions).</li><li>● Forget that survey fatigue is a real thing (e.g., overwhelming employees with questions).</li><li>● Sit on the survey results or ignore questions about next steps.</li><li>● Keep employees out of the process. Employees who are influencers, champions, and advocates for improvement and innovation are critical to helping effect change.</li></ul>	<ul style="list-style-type: none"><li>● Think about the information you want to gather. This will inform what kind of survey you want to send (e.g. pulse survey, category-focused survey, overall survey, etc.).</li><li>● Consider sending surveys more than once a year (monthly, quarterly, etc.) This helps create a culture of continuous feedback and improvement and keeps momentum going.</li><li>● Consider using a survey tool that sends out surveys on a scheduled basis.</li><li>● Set context for employees: communicate the intent and what you hope to gain from feedback.</li><li>● Use survey results and feedback findings to inform areas of focus and improvement.</li><li>● Figure out what you can act on quickly.</li><li>● Remember why you are sending a survey in the first place.</li></ul>