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Employee Development and Retention Guide

Manager Materials

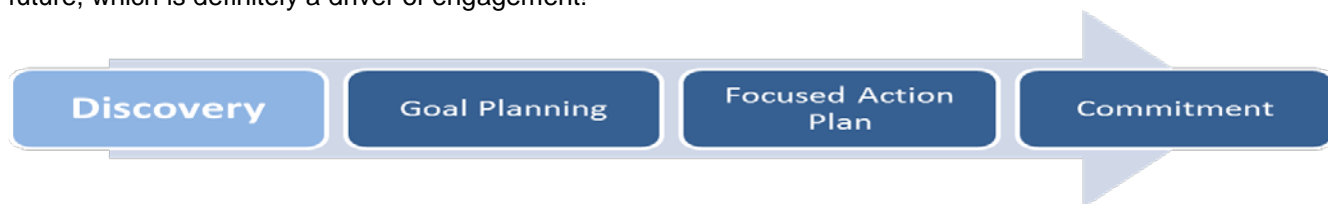
The purpose of the Stay Program is to connect with employees, learn about their interests, and to assist them in creating a plan of action related to their professional growth at *Company XYZ*. This action plan will be designed to fill competency gaps in order to assist employees to reach their developmental goals.

An engaged employee is one that puts forth discretionary effort. While there are many drivers of engagement, the two that we are focusing on in this program are employee development and opportunities for growth. By recognizing employees' potential and making sure that you, their manager, are also engaged in their career and development, we can prepare them for either advancement in the company or growth within their current job to create a theoretical "retention roadmap." We want our high potentials to stay here - it's that simple. Most likely, you are already doing some of the things that we recommend in the Stay Program, however, our goal is to put structure and a framework around the process.

The first step is to discuss with them your vision of their potential. Share why you see them in that light; for example, do they show solid leadership, initiative, creativity, drive, excellent communication skills, and engagement? Based on your discussion and a series of focused meetings, the program will help lay a developmental foundation for building the retention roadmap and addressing any areas where growth is needed to reach their potential.

The Program includes a series of touch point meetings: Discovery, Goal Planning, Focused Action Plan, and Commitment (if necessary). The following pages describe these meetings, what should happen at each, as well as what the end result should look like.

Congratulations! You are taking a great step in providing your employees with guidance and direction to their future, which is definitely a driver of engagement!



Preparation for the initial Discovery Meeting

Prior to the Discovery Meeting, managers should notify HR that they will be participating in the Program with the employee. HR will set up a user ID and login for them to take a career assessment online. We will be using the Career Anchor Self-Assessment, which has been an industry standard for more than 40 years. If you would like more information, visit their website at <http://www.careeranchoronline.com/SCA/about.do?open=prod>. Once the employee has completed the assessment, which is about a 15 minute exercise, the employee will set up the *Discovery Meeting* with you to review the results and start their discussions. Both you and the employee will receive a copy of their individual report before your first meeting.

The questions below are examples you may provide prior to the meeting to get them thinking about what they are looking for in their current role, as well as possible future positions at *Company XYZ*. The questions are also designed to get them thinking about what might cause them to leave.

Below is an example of what you might put in an email to initiate the process:

I'm excited to invite you to participate in the *Stay Program*. The focus of this program is to discuss development in your current position, possible career paths here at *Company XYZ*, and to create a plan of action to help you meet your goals. Your development is important to both of us and I value your contribution to the company. Some of the things I'd like you to think about are answers to the following questions: Example questions:

- What do you like best about your current position?
- What opportunities for growth might you be interested in, either in this position or in other positions or product lines?
- What will keep you at *Company XYZ*?
- What might entice you away?
- What do you need from me to help you be successful?
- What can I do to support your development and career goals?

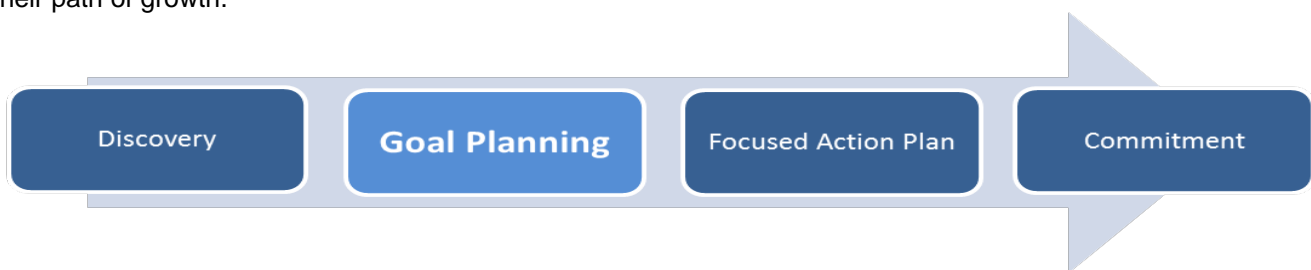
Prior to our first meeting, you will be instructed to complete a career assessment. You will receive an email from Career Anchors Online, which has been an industry leader in this area for over 40 years. The email will include a user id and password. If you would like information regarding this assessment, please visit their website at: <http://www.careeranchorsonline.com/SCA/startPage.do>. We will discuss the career assessment at our first meeting. When you complete the assessment and have had time to think through the questions, please set up a 1-hour meeting with me.

Discovery Meeting

This meeting is really designed as an educational and discovery session to help the employee, as well as their manager (you), gain understanding of how they view themselves at *Company XYZ* and what they foresee in their future. The questions in the invite should be asked at this meeting to promote discussion. This will help provide a framework for next steps and help you understand what the employee needs from you as a manager.

At this meeting, review the Career Anchors report and discuss the employee's thoughts regarding his/her specific Anchor. Are there any surprises? Use this information to guide the discussion about the future, specifically the next 24 months at *Company XYZ*. Find out what position(s) they might be interested in, or, if there is not a specific position or a logical career path, focus on what competencies should be developed within their current job to position them for growth in the future. What ideas may they have to initiate growth in these skills and competencies?

Provide them the *Planning Worksheet* (**scroll to pages 7-8 to find this Worksheet**) and instruct them to think through this discussion and complete only Step #1 for the next meeting. They will choose the competencies where they feel they should focus and create general ideas of SMART goals to develop in these areas. Once that is complete, they should schedule the *Goal Planning Meeting*, which will focus on creating next steps to help them on their path of growth.



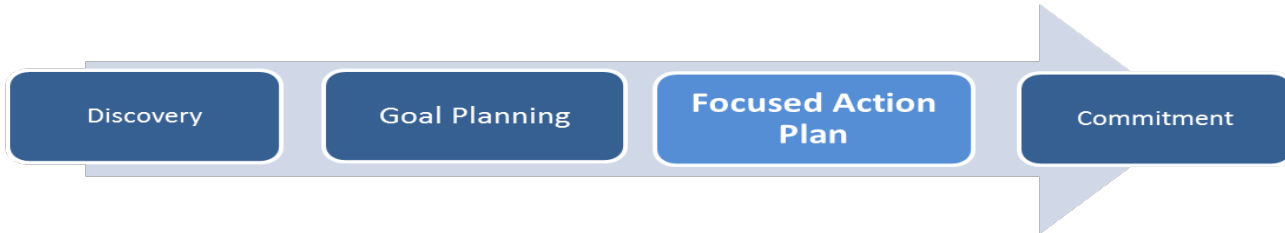
Goal Planning Meeting

At the *Goal Planning Meeting*, the manager and employee will review the employee's *Planning Worksheet* (Step #2). Step #1 of the *Planning Worksheet* is designed to direct thought and conversation toward which competencies need further development and where the specific focus area should be within the chosen competencies. Can you envision a short and long term plan created from their vision? You should be aware of the skill gaps and the performance management of each of your employees. If there are discrepancies between the employee's and your perspective, they should be discussed at this meeting so that a clear and agreed upon expectation is reached.

Discuss actionable plans that may help the employee develop in the designated areas. What specific ideas may they have to grow in these areas? Some suggestions may be job shadowing, special projects, temporary

assignments in other areas, training sessions, books, stretch assignments, a mentor, etc. Feel free to be creative! Learning happens in a variety of ways. Also discuss how these actions may be measured.

At the conclusion of this meeting, instruct the employee to spend time creating a SMART goal(s) draft (Step #3) built around the ideas you discussed in each of the growth areas. Once the draft is complete, the employee should set up the *Focused Action Plan* meeting with you.

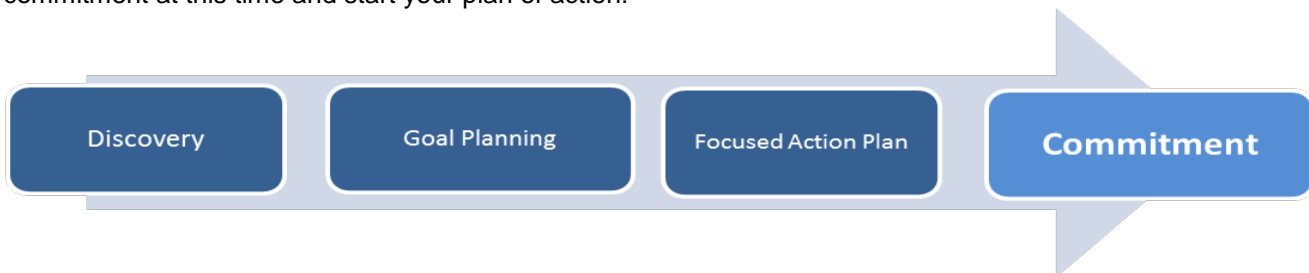


Focused Action Plan Meeting

Once the employee has completed the SMART goal draft on the *Planning Worksheet* (Step #3), a sit down review meeting should occur. The following questions should be asked:

- Are the SMART goals appropriate and consistent with the competency development discussions you've had with the employee relating to their future at *Company XYZ*?
- Are the goals achievable?
- Is the timeline appropriate and acceptable to you as the manager?
- Do you see anything that appears unreasonable?
- Are there people identified who they plan to approach to set up job shadows or temporary assignments? Are those people the appropriate people with which to shadow?
- Are there timelines?
- Are there appropriate measurements?
- Is there anything that you think should be added, removed or modified?
- Are you comfortable that these goals should help the employee achieve their development goals?
- Will growth in these competencies improve your department?

The purpose of this meeting is to verbally discuss the goals and ask clarifying questions, so the employee can make final modifications to the SMART goals draft. It is important that any and all questions are asked at this meeting, as it will be important to make sure the SMART goals are clear and concise. After the meeting, any and all changes should be incorporated into the goals by the employee. Once that is complete, the employee may set up the *Commitment Meeting*. If you are in agreement that no revisions are necessary, you may discuss your commitment at this time and start your plan of action!



Commitment Meeting (if necessary)

At the commitment meeting, the final SMART Goal review is completed and agreed upon. Expectations are clear to both the employee and manager. It is also made clear that the employee will own the responsibility of working through the plan, establishing contacts with internal or external key people to complete the goals, and to set up touch point meetings with their manager on an agreed upon schedule to track progress. Modifications should be made along the way if necessary. The goals should be documented for tracking purposes.

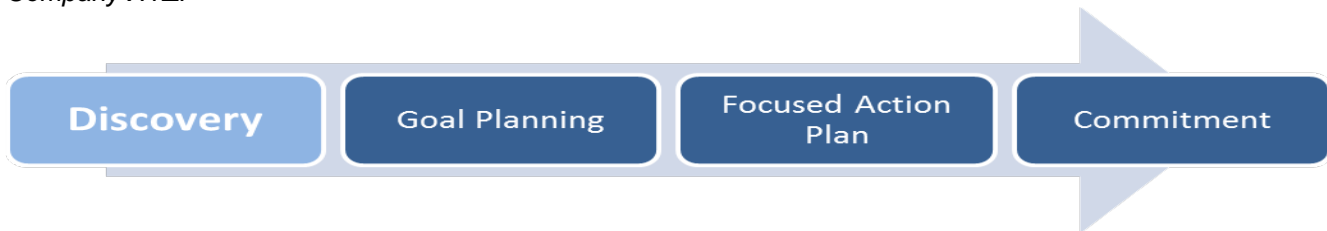
Congratulations! You have just participated in your first *Stay Program*. A suggested timeline to participate in the initial Program meetings should take anywhere from 2-4 weeks. Use your judgment to modify the program or meeting guidelines based on individual needs or timelines.

Employee Materials

The purpose of the *Stay Program* is to connect with you, learn about your interests, and to create a plan of action related to your professional growth at *Company XYZ*. While there are many drivers of engagement; the two that we are focusing on with this program are employee development and opportunities for growth. We want our high potentials to stay here - it's that simple. This program consists of a variety of exercises that will help lay a developmental foundation for building a "retention roadmap."

The Program also includes a series to touch point meetings: Discovery, Goal Planning, Focused Action Plan, and Commitment. The following pages describe these meetings, what should happen at each, as well as what the end result should look like.

Congratulations! You are taking a great step in laying the foundation for growth and development here at *Company XYZ!*



Preparation for the initial Discovery Meeting

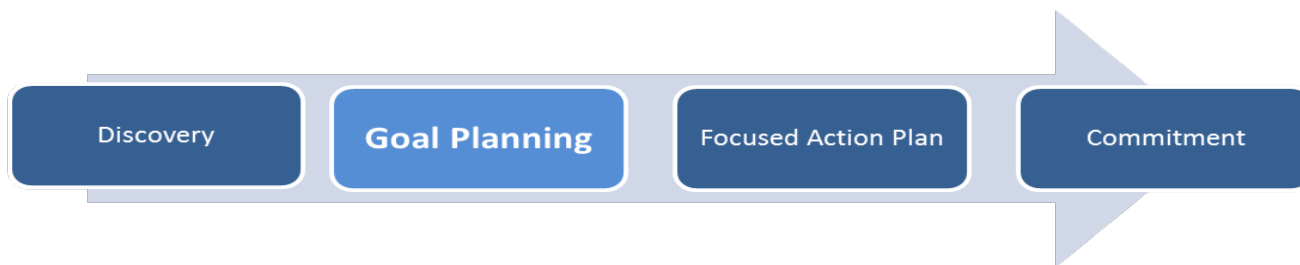
Prior to the Discovery Meeting, your manager will notify HR that you will be participating in the Stay Program. HR will set up a user ID and login for you to take a career assessment online. We will be using the Career Anchor Self-Assessment, which has been an industry standard for more than 40 years. Once you have completed the assessment, which is about a 15 minute exercise, you will set up the *Discovery Meeting* with your manager to review the results and start discussion. Both you and your manager will receive a copy of your Career Anchor Self-Assessment prior to the Discovery Meeting.

Discovery Meeting

This meeting is really designed as an educational and discovery session to help you and your manager gain understanding of how you view yourself at *Company XYZ* and what you foresee in your future with the Company. Within your email invitation to the program, you were provided questions to prepare for a conversation relating to what will keep you at *Company XYZ* and what might entice you away. This conversation will also revolve around what opportunities for growth you are interested in, either developmentally in your current position or other positions that may interest you. This will help provide a framework for next steps in creating a developmental plan to focus on growth in the competency areas needed to reach your goals.

At this meeting, you will discuss the Career Anchors report and your thoughts relating to your specific Anchor. Are there any surprises? You will use this information to have a discussion with your manager relating to the future, specifically the next 24 months. This may include other positions you are interested in, or if not a specific position, competency areas to focus on to meet your overall developmental goals. Questions to ask yourself: what competencies and skills might I need to grow in order to move into the next position? Or, if I am not interested in moving to a new position at this time, how can I continue my development in my current position? What are my ideas to initiate growth in these skills and competencies?

At this meeting, you will receive the *Planning Worksheet (scroll to pages 7-8 to find this Worksheet)* which is designed to initiate thoughts and ideas revolving around growth areas and writing SMART goals for these areas. Please complete only #1 on the *Planning Worksheet*. You will choose competencies where you should focus on growth, as discussed with your manager at this meeting. You will also provide ideas of SMART goals, which you will review and discuss with your manager to fine tune them at the *Goal Planning Meeting*. You should set up the *Goal Planning Meeting* with your manager upon completion of #1 on the Worksheet.

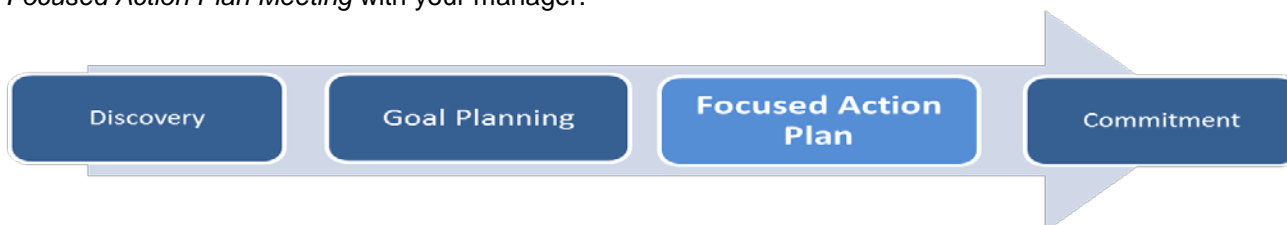


Goal Planning Meeting

At the Goal Planning Meeting, you will review your *Planning Worksheet* (Step #2). The worksheet is designed to help you think about where you see yourself in the next 24 months at Company XYZ. You have selected the competencies and skills needed for growth either into the next level position or within your current position, and prepared SMART goal ideas in those areas. Can you envision a short and long term plan created from your vision? If there are discrepancies between what you and your manager think the targeted gap areas should be, you will discuss them at this time to come to agreement of where your focus areas should be targeted.

You and your manager will discuss actionable plans that may help you develop in the designated areas. What specific ideas might you have to grow in these areas? Some suggestions may be job shadowing, special projects, temporary assignments in other areas, stretch assignments, etc. Feel free to be creative! Learning happens in a variety of ways.

At the conclusion of this meeting, you will spend time creating a SMART goal(s) draft (Step #3) built around the ideas you discussed in each of the growth areas. Once the draft is complete, the employee should set up the *Focused Action Plan Meeting* with your manager.



Focused Action Plan Meeting

Once you have completed the SMART goal draft on the *Planning Worksheet* (Step #3), a sit down review meeting should occur. You and your manager should discuss the following questions:

- Are the SMART goals appropriate and consistent with your developmental path and the discussions you had relating to your future at *Company XYZ*?
- Are the goals achievable?
- Are the timelines appropriate and acceptable to both of you?
- Are you both in agreement that the goals are reasonable?
- Are there people identified whom you plan to approach to set up job shadows or temporary assignments? Are you in agreement that those are the appropriate people?
- Are there timelines?
- Are there appropriate measurements?
- Is there anything either of you think should be added, removed or modified?
- Are you both comfortable that these goals should help you achieve your developmental goals?
- Do both of you feel that growth in these competencies will improve your department?

The purpose of this meeting is to verbally discuss the goals and ask clarifying questions, so you can make final modifications to the SMART goals draft. It is important that any and all questions are asked at this meeting, as it will be important to make sure the SMART goals are clear and concise. After the meeting, you should incorporate any and all changes into the goals. Once that is complete, you may set up the *Commitment Meeting*. If you are in agreement that no revisions are necessary, you may discuss your commitment at this time and start your plan of action!



Commitment Meeting

At the commitment meeting, the final SMART Goal review is completed and agreed upon. Expectations are clear to both you and your manager. It is also important to understand that you will own the responsibility of working through the plan, establishing contacts with internal or external key people to complete the goals, and to set up touch point meetings with your manager on an agreed upon schedule. Modifications should be made along the way if necessary. The goals should be documented for tracking purposes.

Congratulations again! You have just participated in your first *Stay Program*. A suggested timeline to participate in the Program should take anywhere from 2-4 weeks. Use your judgment to modify the program based on individual needs or timelines.



Planning Worksheet

Step 1 – Choose Competencies

Where do you see yourself at Company XYZ in 24 months?

What competencies and skills do you need to build to get there? 'X' the top 3 from the list below and state what specifically you need to focus on within that competency:

- Customer Focus
- Communicates Effectively
- Innovation/Problem Solving
- Build Collaborative Relationships/Influence Others
- Adaptability
- Accountability
- Business Acumen

Other

Create ideas for developmental goals based on the competencies you've chosen above. Also think about how you will get there and how success will be measured. Example: In the next 6 months I will improve my public speaking skills by bettering my capability to handle live client meetings without any hesitation or assistance from others.

- 1.
- 2.
- 3.

Step 2 – Schedule a review meeting with your manager to review the Planning Worksheet

Step 3 – Create your SMART Goals

- Include a narrative statement of what the end result looks like
- Include action steps to get there
- Include a timeline
- Include measurements on the end result/deliverable

SMART Goal #1:

SMART Goal #2:

SMART Goal #3

Step 4 – Review with your manager and fine tune your plan!