

TALENT4LIFE  
MODEL HANDBOOK



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# INTRODUCING THE TALENT4LIFE MODEL HANDBOOK

Companies across the world face a myriad of challenges. The COVID-19 pandemic has highlighted the need for companies to remain responsive to change and stay one-step ahead of developments in the marketplace. One of these challenges is to recruit, develop and retain talented staff, which has been impacted by several recent developments. The fast-moving digital environment makes it necessary to develop new skills on a regular basis and it highlights the importance of employee development to gain these new skills. The demographic shift towards an aging workforce makes it crucial to actively recruit employees aged 45+ years since they will make up an increasing part of the labour market into the future. Hiring older employees is a way to create a strong and inclusive workforce, stay competitive, and mitigate against future labour shortages.

The Talent4LIFE project aims to improve the development and retention of employees with a special focus on those aged 45+ years. An empirical research study was carried out at the initial project stage to investigate the current state of European companies regarding talent management-based staff retention and staff development. The results of the research informed the shape and content of this Handbook, and several key findings will be highlighted through the Handbook, however we would like to emphasis one key finding that emerged at this point; and that was that “companies that implemented a higher number of talent management processes, scored higher in terms of future-proofness to external political, economic and demographic changes”. The full research report can be found on the Talent4LIFE website for further reading if desired. The Talent4LIFE Model Handbook acts as a guideline on how to: 1.) introduce a talent management system 2.) why it is important to develop and retain staff successfully, and 3.) how to enhance different areas within your company to improve talent retention. Before explaining what talent management is, we introduce the content and structure of this handbook.

## About this Talent4LIFE Model Handbook

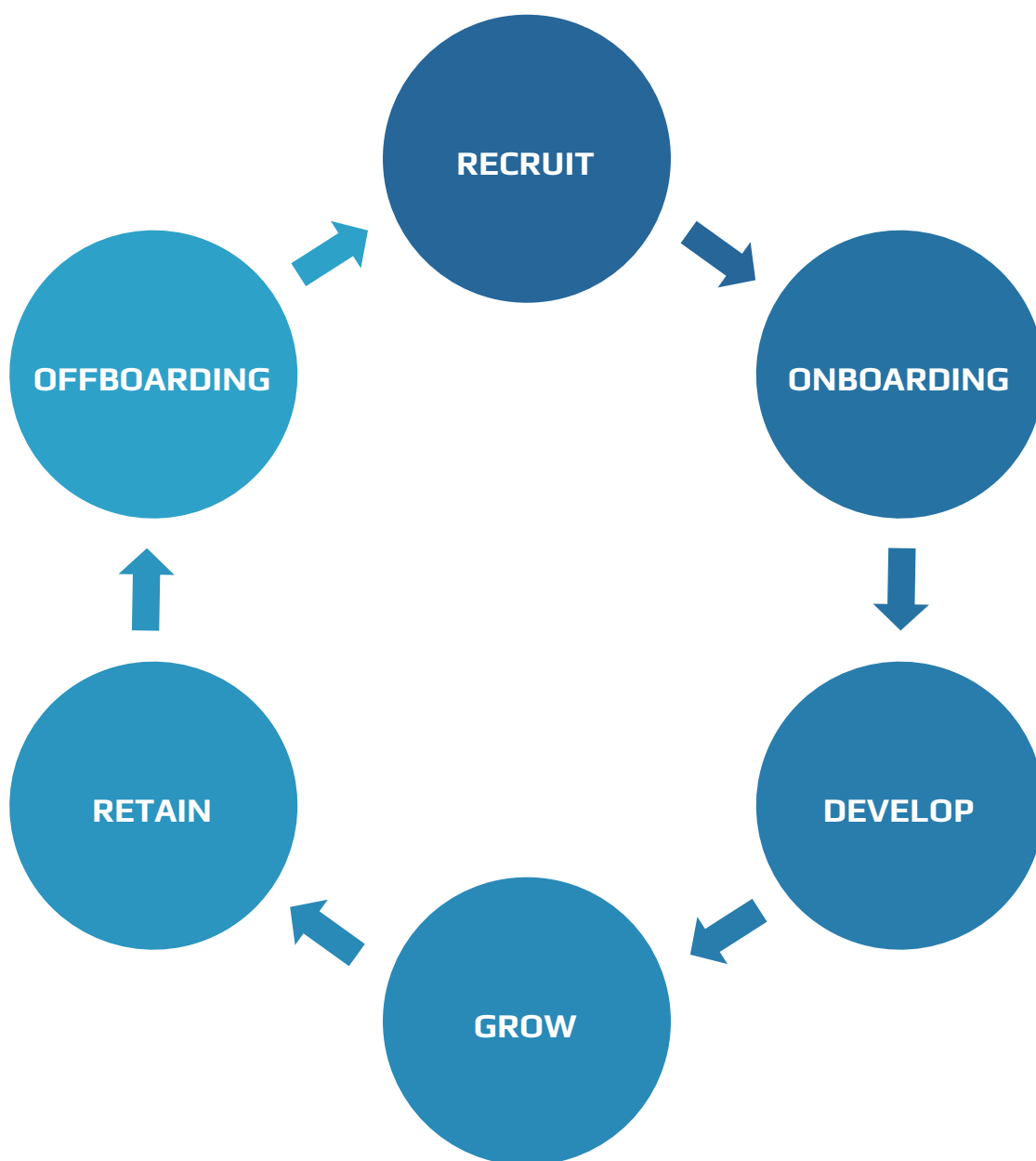
This guide is predominantly conceived for HR professionals and SME business owners and aims to improve employee retention and development through implementing a talent management system. Although the handbook highlights specific considerations in relation to employees 45+ years, it is designed to be inclusive of all employees thus widening its appeal to all size companies, sectors, and industries in Europe.

The Talent4LIFE Model Handbook contains the most important topics of the employee lifecycle from a talent management perspective. The Handbook comprised six key chapters detailing the core elements of a Talent Management system:

1. Recruiting for Talent
2. Onboarding
3. Develop
4. Grow
5. Retain
6. Offboarding and succession planning



Each chapter of the Handbook covers a stand-alone talent management topic, which readers can use in isolation or navigate through the chapters most relevant to their companies. Each chapter includes a brief overview of the topic and outlines tools and techniques to support the talent management of employees. It explains how to adapt the right approach for your company and provides tips and strategies for implementing it.



## 1. Recruit

The recruitment process is the first step in the talent management process. This step can already be a challenge for SMEs since they do not have as many resources as larger companies. In this section we explore key aspects of the recruitment process and the importance of employer branding. We offer a recruitment strategy to build upon.

## 2. Onboarding

The onboarding process is already the first test for the company. Employees get to know the company and check if the company keeps its promises (e.g., are the corporate benefits integrated into everyday life?). New employees get to know their work environment, their colleagues and the company's structure. It is crucial to implement a smooth onboarding process so that new employees fully understand what is expected of them.

## 3. Develop

Developing employees is the core of talent management and staff retention. In today's challenging labour market, it is important to hold on to talent within the company as finding new employees is costly and time consuming. It is essential to train and develop employees to ensure ongoing productivity. This is especially relevant for workers 45+ years as they are usually knowledgeable and experienced but might face difficulties with current developments such as digitalisation.

## 4. Grow

The Grow section is closely related to the previous section Develop. Both chapters centre around employee development. Whereas Develop reflects the employer's perspective, Grow focusses on the employee's perspective. Grow is about taking on more responsibility and more advanced work. As an employee, where do I want to go?

## 5. Retain

In the phase of talent retention, employees are committed to the company in the long term and remain in the company. Talent retention includes personalised talent development and the comprehensive package the company makes to its employees. Ideally, the mutual investments of employees and the companies they work for should lead to personal and organisational success.

## 6. Offboarding and succession planning

It is not only important to provide a good workplace environment for employees, but also a professional offboarding strategy when an employee leaves. Whether an employee resigns, retires, or has their contract terminated, a compassionate exit will always pay well to the company and its values. If an employee leaves a happy environment, they are more likely to return later with improved skills. Where an employee does return, they re-join the employee lifecycle at the recruitment stage.







The Handbook also features the Talent4LIFE Personal Development Evaluation – a specific instrument developed for staff retention purposes. Building on a typical balanced scorecard used for the strategic development of companies, the Talent4LIFE Personal Development Evaluation is a new tool that can be used to assess the talent within a company by balancing the needs and requirements of the employer with each employee. The Talent4LIFE Personal Development Evaluation identifies job-related gaps in skills and competences, enabling employees to develop according to their specific needs and that of the company. This helps companies to close skills gaps in a proactive, strategic, and inclusive manner.

The units in this introductory chapter aim to raise awareness about age sensitivity and generation management within the company. The chapter provides an overview of key labour market trends and issues experienced by companies and closes with a short self-assessment 'Are you ready for talent management?' questionnaire intended to build awareness of the components of talent management. It will highlight that implementing a talent management system is often time-consuming and requires significant effort by SMEs but is very beneficial to your company in terms of its future proofness to respond to current and future labour market challenges. Developing your employees pays off in the end as it adds value to the work they do and directly benefits your business.

# INTRODUCTION:

are you ready  
for talent  
management?

*'The growth and development of people  
is the highest calling of leadership.'*  
- Harvey S. Firestone (Cook, 2017)



# UNIT 1: WHAT IS TALENT MANAGEMENT?

There are many definitions of the term 'talent' and 'talent management' and companies may prefer to use their own interpretations, however it is helpful to start with a broad definition that we will use for the purposes of the Talent4LIFE Model Handbook.

- **Talent** refers to individuals who can make a significant difference to organisational performance. This may either be through their immediate contribution or, in the longer-term, by reaching their highest levels of potential.
- **Talent management** is the systematic attraction, identification, development, engagement, retention, and deployment of those individuals who are of particular value to an organisation. This may be through their high potential or because they fulfill critical roles. (CIPD, 2021)

A talent management system is a comprehensive approach involving the whole company to keep it agile and responsive to current and future challenges. A conventional talent management approach might only focus on developing the high performers, which account for 3-10% of a company's employees. In contrast, an inclusive talent management system recognises that companies cannot allow themselves to invest in only a minority of their workforce, but rather recognises the skills and talents of all employees. Inclusive talent management systems define 'talent' as ability, which every recruited employee has and contributes to the business success and aims to create a motivated workforce, which will stay with the company long term. One way to apply an inclusive, age-sensitive system and retain staff is the implementation of an inclusive talent management system. The results of our **empirical research report** highlighted the importance of HR practices for the future-proofness of businesses. The basis of an inclusive talent management system can be divided into the following three pillars:

- The company's strategy: giving the direction
- The corporate culture: paving the way
- HR practices: implementing personnel processes (von Hehn, 2016).



## COMPANY STRATEGY

Talent management is 'the methodically organised, strategic process of getting the right talent onboard and helping employees grow to their optimal capabilities, keeping organisational objectives in mind' (Ghosh, 2021). This means, talent management is a company's strategic approach in attracting, hiring, managing, and retaining employees that possess the talents needed to achieve and sustain success. Companies depend on their employees' talent to reach their vision and goals. To head in the right direction, it is imperative that companies have a clearly defined talent management philosophy as part of their strategy. This talent management philosophy should be the guiding principle dictating how companies strategically hire, manage, and retain their talent and how all important 'talent-related' decisions are made (Fessas, 2016).

Strategic talent management has two main benefits: firstly, filling positions that are critical to success through systematic recording of potential in the company and through retention efforts. Secondly, professionalisation of personnel work and change of the management culture towards a support culture (Nagler, 2018). As such, the concept of talent management involves a holistic and continuous process in managing the abilities and competencies of employees within a company. This means going beyond recruiting the right candidate to explore their qualities and investing in their further development. With rapidly shifting business trends comes the need for workers with new specialised skills as well as an ability to adapt quickly to new roles and tasks. (von Hehn, 2016, p. 185).

## CORPORATE CULTURE

Through different values and societal norms, companies and individuals interact with one another and shape the work and management culture. The corporate culture must provide an open, inclusive working environment. This requires an appreciative attitude of managers towards the employees as well as the ability to give clear and ongoing feedback to drive employees' development (Hehn, 2016, pp. 4–8). Such inclusive leadership is a management model based on respect and diversity. Inclusive leaders enable diverse individuals to reach their full potential and harness their different skills to create solid, efficient, and cohesive teams (Fundación Adecco, 2021).

Team leaders are the strategic executive figures in the company: they face the challenge of breaking down comfort zones and creating an open and empathetic atmosphere. Successful leaders will embrace generational diversity, so that it is not only respected, but also positive for all people and departments (ieFoundation, 2017). It is important to train leaders to integrate each person as a solid member of their team, fostering their individual talents to contribute in a useful and active way to the mission of the team and company.

Corporate culture is supposed to support openness and employees' learning ability. In terms of in-house training, daily practice is key to acquiring the necessary knowledge (Nemzeti Tehetség Központ, 2020), which highlights the importance of an open corporate culture to foster a good learning environment. The consideration of different direct and indirect factors (e.g., low applicant rates due to demographic changes or implementation of new technologies) within the talent management strategy enables a sustainable and proactive action (Hehn, 2016, pp. 8–10). A highly adaptable company with a well-functioning talent management system is well placed to master current as well as future challenges, such as current demographic developments and the lack of a skilled workforce.



## HR PRACTICES

HR practices are an essential part of human resource management (HRM). Many studies have proven the influence of HRM and HR practices on organisational performance and success (e.g., Katou, 2017). The correlation between HR-enhancing practices and organisational performance occurs when examining SMEs (Rauch & Hatak, 2016). Our empirical research study found that the future-proofness of a company depends on its HR and talent management practices: the more practices implemented (e.g. coaching, mentoring, job rotation, job shadowing, succession planning etc.), the more futureproof the company was. Since big companies use more talent management practices than SMEs, they are statistically more future proof than SMEs. In terms of talent management, it is important to note that talent management is not just a new term for human resource management (HRM), but HRM is a part of talent management.

## GENERATION MANAGEMENT

A multi-generational workforce is composed of people from several generations. As the average lifespans increase, people are choosing to work past the typical retirement age. There is considerable age diversity within today's labour market, and it is now commonplace for companies to have employees working side-by-side who represent four to five generations. These generation groups are typically defined as:

- Silent Generation – born 1928-1945
- Baby Boomers – born 1946-1964
- Generation X – born 1965-1980
- Millennials (Gen Y) – born 1981-1996
- Generation Z – born 1997-2012

The presence of multiple generations expands the pool of available talent and shifts its demographics. Still, many employers have not placed a significant focus on taking advantage of this. To implement an inclusive, intergenerational company structure, it is crucial to take the needs of the different generations into account. Focusing on only one generation can have a negative impact on the work culture. Younger employees are accustomed to rapidly developing technology and adapting to the changes it drives. In contrast, more mature employees have knowledge from the duration of their experience that can guide decision-making. The collaboration of fresh innovation with wisdom from the experience brings increased productivity to companies. Teams of mixed generations with adapted framework conditions are more innovative and better at solving problems. (Reiner et al., 2020, pp. 223–225).

Employees aged 45+ years often face different barriers than younger workers. Their qualifications and skills can appear outdated, and their motivation and job satisfaction may be very different to a younger worker. However, older employees have a lot to contribute to a company's success. Their knowledge and commitment can make a substantial contribution to economic growth and productivity. When employees 45+ years view themselves as valuable assets to the team, they are willing to contribute more. When equipped with the necessary skills, older workers are more likely to be motivated to continue working beyond pensionable age. Studies indicate that well-trained employees, who feel valued are more likely to stay - high-skilled employees tend to work even after receiving a pension (European Commission, 2016).

If all age and population groups are included in working life, society can also benefit. Finding a job is often a major challenge, especially for older people and losing your job after the age of 45 can often result in long-term unemployment (Bundesministerium für Arbeit, 2021). Recognising the talent, experience, knowledge, and skills of every employee, regardless of age, is critical for any business (ieFoundation et al., 2019).

To summarise, talent management is a strategic approach that can help SMEs evolve and boost their resilience, productivity, and adaptability to cope with and take advantage of shifts and changes in the economy as well as technological advances. Moreover, the skills management included in a talent management system helps employees enhance their competences and develop practical and specialised skills. By learning new relevant skills, workers become better aligned to the needs of the labour market and they can adapt to changes brought by technological advances and digitalisation. Inclusive, age-sensitive talent management can contribute to the economic performance of companies in general and position businesses to better address developments and the impact of digital transformation. Longer term, companies using a talent management approach are often more sustainable and competitive.





## UNIT 2: KEY LABOUR MARKET TRENDS AND ISSUES

Global trends have a considerable influence on businesses, as the COVID-19 pandemic has shown. The pandemic has significantly advanced digitalisation. Remote working and virtual meetings became part of daily business and Companies adapted to maintain productivity and well-being of employees during the pandemic. Even if remote work is not present in such a comprehensive way as during the pandemic: 'remote work is here to stay' (Zahidi, 2020). The need for digital skills and development of new skills, is widely recognised: 'With such rapid, global innovation, professionals must have robust business management skills that include the ability to identify and implement international technologies to aid businesses worldwide' (D'Amore-McKim School of Business, 2018).

Whether large or small, trends influence not only large and global players, but also small local businesses. There is a clear shift in sought after skills on a global level. Research shows that 50% of employees will need re-skilling by 2025. This includes self-management skills such as active learning, resilience, stress tolerance and flexibility (World Economic Forum, 2021).

Digital literacy is already a requirement for most employees. Today, employees communicate with colleagues, external partners, and customers via digital communication tools. Digital literacy has become a requirement for employability, which impacts especially older generations. Older employees will not have grown up with digital devices and therefore may need to catch up. Changes in the demands of the labour market are progressing at such a rapid pace that training content can hardly be adapted (Stohr, et al., 2021). It is crucial to implement structures, which support ongoing employee development as well as a corporate culture that encourages constant exchange between employees. This exchange allows people to improve both hard and soft skills. To learn more about developing your employees' skills, it is recommended to read and consider chapter 3 of this Handbook: Develop.







### How to deal with trends

It is not only about adapting to trends such as digitalisation, but also about having a corporate opinion about social trends. This can influence where you stand as a company and how others (e.g., employees, customers, and other stakeholders) perceive your company. A good reputation increases employee loyalty and staff retention.

Actions that are perceived negatively, will give your company a negative reputation and it can be very difficult to shake a bad reputation off. For example, Swiss company Nestlé is a big player on a global level. In the mid-1970s, they were targeting mothers in third World countries with baby formula and encouraging them to use it instead of breastmilk. Their highly controversial and assertive approach with mothers was highly criticised, with accusations that their actions were leading to less healthy babies and even contributing to young infant death. (Andrei, 2021; Mattera, 2021).

On the positive end of the spectrum, soap and skincare company Dove decided to take up the body positivity movement and promote self-confidence and a positive body image in its advertising. In this way, the brand cleverly created an association between its products and "real beauty". The company benefits from promoting a social movement, and that can be your goal as well. It is up to you to decide what your company stands for. Be aware that every decision to represent values and take up social movements or not can have its consequences – both positive and negative. Your digital footprint can remain indefinitely, so it is important to carefully consider the type of message and company personality you want to put out.



## UNIT 3: ARE YOU READY FOR TALENT MANAGEMENT?

A talent management system cannot be implemented overnight. Successfully implementing a talent management system requires a great deal of effort and commitment from the entire company, especially from management. As introduced in the beginning, talent management is crucial for business success and the future of work. It positively influences company performance, and it ensures the continued existence of companies:

*'Respondents at companies with very effective talent management are six times more likely to report higher total return to shareholders (TRS) than competitors, versus those at companies with very ineffective talent management' (Mugayar-Baldocchi, et al., 2021).*

On the one hand, it takes time and planned effort to implement various practices in your company to develop a successful talent management system - the importance of HR practices for the future-proofness of businesses was already highlighted in this chapter. On the other hand, a company and its staff must be open-minded and ready to take some serious steps to change the corporate culture if needed. Changes could include communication structure, e.g., establishing two-way feedback loops, as well as HR practices from recruiting until retaining and offboarding processes.



### So, are you ready for Talent Management?

We have created a short self-assessment quiz to identify the extent to which you are ready for talent management. It consists of twelve simple questions related to talent management to which you answer either yes or no. Complete the quiz, then add-up your score and refer to the scoresheet to determine your next steps in your journey towards inclusive talent management.

QUESTION	YES	NO
1. Are you ready to involve employees in decision-making processes?		
2. Are you ready to assign responsibility to your staff?		
3. Do you see your staff at least equally as important for your business success as sales numbers?		
4. Are you ready to set-up two-way feedback loops and incorporate your employees' feedback?		
5. Would you like to set-up a communication system to improve communication between your employees?		
6. Are you ready to implement practices to improve knowledge transfer and communication between employees?		
7. Are you ready to invest a lot of effort in developing your employees according to their needs and the Company's needs?		
8. Are you ready to involve not only your employees in key positions but your whole staff in development actions?		
9. Are you ready to record the necessary skills for your employees' positions and create job profiles?		
10. Are you ready to take the needs and requirements of your employees into account (e.g., respect and value, enable work-life-balance, flexible working arrangements)?		
11. Are you ready to undertake substantial efforts to retain staff aged 45+?		
12. Are you ready to undertake substantial efforts to develop staff aged 45+?		



## Scoresheet

To come to a result, please count the number of questions you answered with 'no'.

### 0-2 questions answered with 'no'

Perfect, you are ready to dive into talent management! Choose a section you want to start with and start to improve your staff retention (particularly of 45+ year olds) using talent management.

### 3-4 questions answered with 'no'

Before starting with the implementation of a talent management system, please have a look at its benefits. You will need to put effort into the implementation and may need to change your corporate culture more than you want to. Be as open-minded as possible if you wish to successfully implement a talent management system and retain your staff.

### 5 or more questions answered with 'no'

If you answered more than five questions of the self-assessment with 'no', please reconsider your goals. The talent management approach may not be the right approach for your business at this time since it is not a quick solution to retain staff without effort and willingness to make changes. You need ready and open to make changes within your company to reach the goal of staff retention proposed in this Handbook. If you think you are ready to implement a talent management system and/or improve relevant parts of your company, continue with this Handbook, and go through the chapters of your choice and their units.

## What next?

This chapter has given you a good overview of what talent management is and its benefits. You should now be aware of:

- Aims of a talent management system
- The importance of generation management and the inclusion of older generations
- The benefits of introducing a talent management system
- The effort required and the staff retention payoffs of implementing talent management

The next step is to read and use the Talent4LIFE Model Handbook as you wish. You can follow the logical order of chapters as defined by the talent management process: recruitment right through to offboarding or you can dip in and out of the chapters based on the needs of your company and where you are on your talent management journey.

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*“The hardest part is starting. Once you get that out of the way, you’ll find the rest of the journey much easier”*  
- Simon Sinek

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# CHAPTER 1:

# recruiting talent

*“Acquiring the right talent is the most important key to growth. Hiring was – and still is – the most important thing we do.”*

**- Marc Benioff**

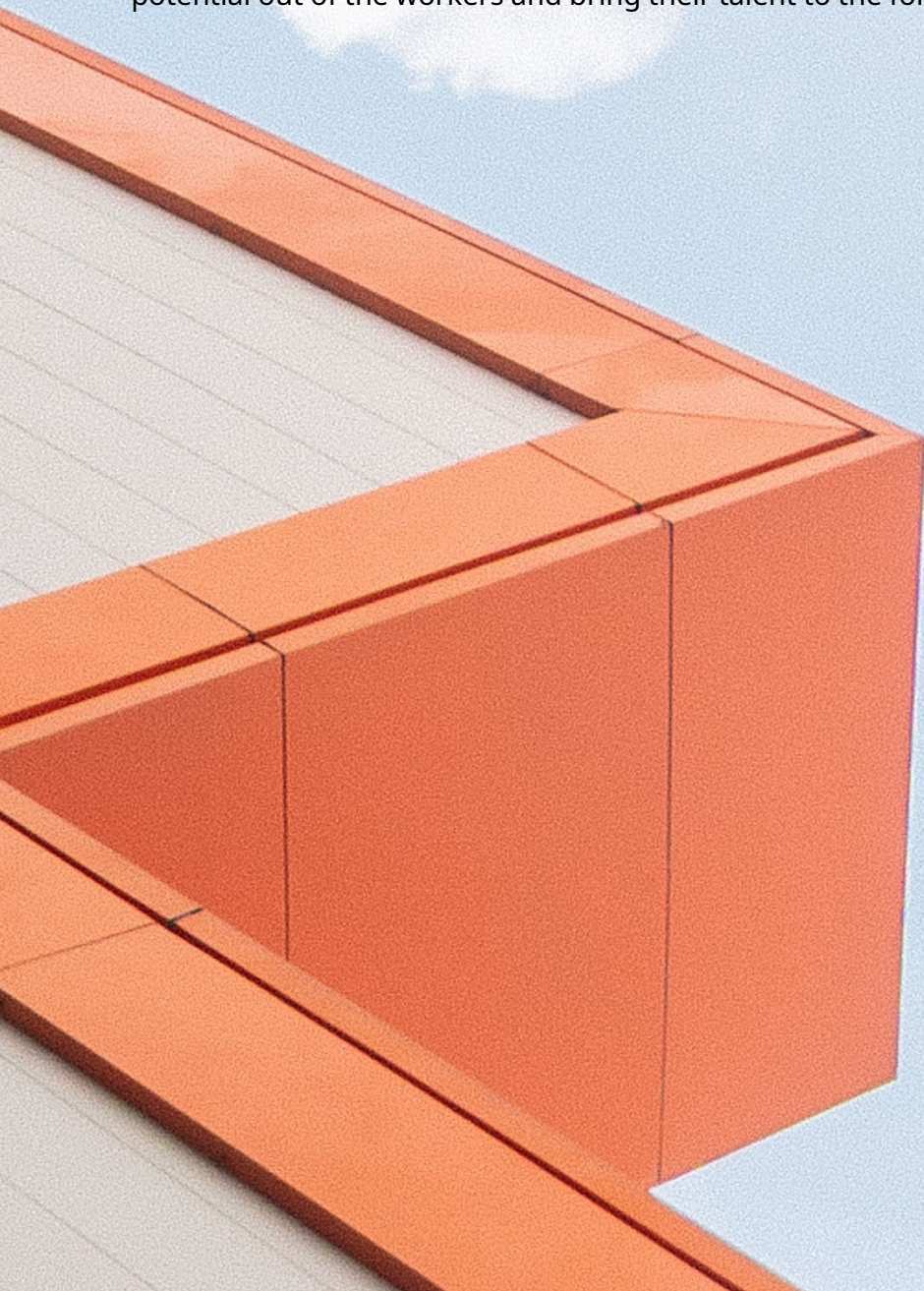


In this chapter, we explore the first step in the talent management process. Over the three units that comprise this chapter we will look at the key aspects of recruiting talent within a company.

In the first unit, we introduce the concept of Employer Branding (EB) and the Employee Value Proposition (EVP). We will look at the differences between the EB and the EVP and showcase examples of each in different global companies. We will also look at employer branding in SMEs and how smaller companies can work it.

In the second unit, we focus on the recruitment processes for the acquisition of talented people, and we will also see what the 'perfect' selection process would be like. We define and differentiate the terms 'recruitment' and 'acquisition of talent'. Then we evaluate the steps a company should follow during the selection process, including the use of tools that can help with each step. Finally, we outline our six tips to create a good experience for the candidate and that should enable a 'perfect' selection process.

In the third and last unit, we explain what talent acquisition is and we put the current situation in relation to the 'war for talent' and the search for talent within SMEs. We will cover tips on how an SME could attract talent and we will also share a series of guidelines to follow to find untapped talent within your company. This will lead on to a series of indicators that companies can use to evaluate the talent of employees. Finally, we will explore indicators on how to get the maximum potential out of the workers and bring their talent to the fore.





# UNIT 1: EMPLOYER BRANDING AND THE EMPLOYEE VALUE PROPOSITION

In this unit, we will address Employer Branding and how to use it for talent management. We will start addressing the concept of Employer Branding and EVP from a general perspective, showing examples from larger companies. Then, we will take this strategy and adapt it to SMEs. First, we would like to define the differences between Employer Branding and Employee Value Proposition (EVP).

According to About All Things Talent, a community of Human Resource professionals who are passionate about recruiting and human resources, “employer branding is a set of persuasive reasons why the brand is ‘a great place to work with’, instead EVP is a set of concrete steps that the company has taken to make the above a reality. Simply put, employer branding is a promise, which gets delivered through EVP that acts as an objective accounting of the strengths and opportunities of the Company. A company’s EVP is what it is popular for. This is why it is important to analyse it in order to be able to define the strengths and weaknesses and then use the same to build a strong employer brand accordingly.”

Everyone talks about employer branding in companies, but how important is it to have a good employer branding in our company? According to Manu Romero (Romero 2017), founder of [Departamentodefelicidad.com](http://Departamentodefelicidad.com), and his article “Employer Branding: What it is, Strategies, Companies and KPI”, he explains that we must take a step forward and highly value the employer brand of our company because we need to achieve a strong brand that makes the most talented people want to work in our company and, more importantly, that makes the top talent of our company want to stay.

The newer generations are very demanding and critical when choosing the company they want to work at. Thanks to modern facilities, they can get to know the company, its clients, their future colleagues, opinions of former employees, events you attend, customer reviews, etc. with just one click. That is why any detail is important and decisive for them when choosing one company over another. In addition, the talent brand internally develops commitment, motivation and satisfaction in the workplace and should help build a connection between personal values and company culture.

Every company has an employer brand, even if it has not been intentionally worked on. Employer Branding is about the first impression we have of a company and its reputation. Therefore, it is important to analyse the employer brand and to understand what company image you are projecting to the talent pool you are hoping to attract to your company.

The eight steps below set out how you can strategically develop and promote your employer brand to your intended talent pool:

### 1. Form a responsible team

When deciding to build an Employer Brand Strategy, it is important to carefully consider the team that will analyse, define, and promote it. We would advise you to create a multidisciplinary team formed by employees from human resources, marketing, and communication. It is important that members of the team understand and are totally aligned with the corporate strategy. If working in an SME, choose employees that will champion the corporate values and strategy and invite them to join your team.

### 2. Define your stakeholders

One of the most important steps is to identify the interest groups or stakeholders to design the strategies and actions to be carried out. These groups, mainly tend to be company employees, suppliers, unions, customers, or the media. It is important that when defining and preparing the actions to be carried out, they respond to the groups that are of interest to your company.

### 3. Analyse the current situation

It is important that before starting to work on the Employer Brand you understand the current situation the company is in, where it is and where you want it to go. At this point Manu Romero (Romero, 2017) left us some key questions to better understand these situations.

### 4. What is your business?

- Where do we find ourselves and where do we want to go?
- What values and culture define you?
- What do your employees think of your company?
- What is said on the Internet about you (forums, social networks, blogs, rankings)?
- It is very important to answer these questions honestly since the answers will help to establish the strategies to follow in order to develop your employer brand.

### 5. Set Goals

One of the key steps is setting the goals. You must know the objectives that are aligned with the strategy of the Employer Brand. You should think about the objectives that the company wants to achieve, and based on these objectives, think about the actions that are going to be carried out and how you are going to execute those actions.

### 6. Develop the "Employee Value Proposition"

According to Manu Romero (Romero, 2017), the centre of your brand pattern should be the value proposition for employees. This is just a clear definition of what you offer to your future and current employees, why an employee should work for your company and not for a competitor and what makes your company unique. It is important to define the attributes that differentiate you from the competition and make working in your company a unique and attractive proposition.

### 7. Choose the channels to communicate

The interest groups of your company have been previously defined. You have to stop and think about what channels you currently use to reach those targets and how relevant they are. Think beyond social media to be fully inclusive when communicating your message.



## 8. Plan the actions

If all the previous steps have been carried out correctly, it is time to start planning actions surrounding your employer brand. Internal actions involve employees who are currently working in your company and external actions will focus on employees who may join the company in the future.

## 9. Detail the KPIs, measurement and evaluation mechanisms

Finally, it is important to measure the objectives that we have established and define Key Performance Indicators (KPI) with each objective. KPIs are pre-determined measurable outcomes linked to key business objectives. An example in a sales team might be reaching certain sales volumes for a particular product each month; for the HR team it might be the number of new hires or staff turnover rates. Using KPIs will enable you to see the progress that the company is making on specific objectives and to break down and overcome any barriers to achieving them.

Below are some practical examples of Employer Branding in action within larger global Companies:

### Google

When people think of the best company to work for, Google is a name that would come high up on many people's lists, and this is not without reason. Google is constantly building its reputation as a top employer. The technology giant is always communicating about its work philosophy and the social benefits and facilities it offers (free transport, medical care, extra vacations, legal advice, training, rest and leisure rooms, gym, etc.). The most remarkable thing about Google is the way it selects talent, with people that best fit its culture at the centre of its recruitment selection process. Video: The video shows an insight into the first week of a new recruit within Google

### Heineken

Heineken stands out for its original techniques when it comes to attracting and retaining talent. Its "Go to places" videos communicate with potential and current employees and with their customers and feature messages such as "In Heineken you can design your own professional career ", "You work in the best company in the world, we are creative and fun!" Or "Did you know that we offer more than 250 beers in more than 70 countries, we are the best brewery in the world". They convey a realistic vision of the company culture with the aim of attracting talent and getting people who watch the video to breathe the brand.

[Video 1](#): shows the differences between the candidates and what Heineken as a company thinks.

[Video 2](#): highlights how the Heineken recruitment process works.

### IKEA

How do you innovate talent selection? This is a question perhaps best answered with the following example at IKEA. The key to the strategy of this company lies in the shared passion for home furnishings. "By helping our clients build a good home, we can help improve their daily lives," says Lars-Erik Fridolfsson. He also comments that "values and attitude are more important than CV" in their selection processes, where they innovate in the process. Candidates are invited to attend the process with a photo of their living room, asking them to talk about what they like about the room and what inspires them. This allows them to quickly identify people who are passionate about furniture and good design and how they can make a difference in the lives of their customers.

Video: In this video IKEA employees explain what it's like to work at IKEA.

## Microsoft

Another company that is listed as one of the best companies to work for is Microsoft. At the core of its talent recruitment strategy is that Microsoft is recognised as a great place to work, having a clear EVP, and developing a digital strategy.

[Video](#): This video shows what working at Microsoft is all about.

Now that we have a better understanding of employer branding, we will look at the importance of EVP within a company. According to Emily Heaslip, content writer at Vervoe, in her article “13 Inspiring Employee Value Proposition Examples to Attract Great Talent” (Heaslip 2021), a value proposition is more than just a marketing exercise for employees. In addition, a good value proposition according to Emily can help reduce employee turnover, improve profits, provide a great employee experience, and build an inclusive workplace. Other things that employees value the most when looking for work are health benefits and the location of the company. Finding the right combination of incentives is important, as value propositions also help make the work environment better. Moreover, a value proposition that combines good benefits and adequate compensation makes attracting talent to the company easier.

Below are some practical examples of how a good Employee Value Proposition can work when recruiting talent:

## LinkedIn

LinkedIn's value proposition **is** based on its motto, #LinkedInLife. The purpose of this company is for employees to publish the culture of their company on LinkedIn's social network. LinkedIn also offers a wide variety of benefits that encourage employees to stay leading to a strong talent retention model.

[Video](#): A look at what LinkedIn Life means to their employees

## Airbnb

The key to this company lies in its mission, "create a world where anyone can belong anywhere." Its four core values of inclusion, care, support, and innovation are central to its image and value proposition. Also, unsurprisingly its EVP is connected to the travel community.

[Video](#): Life at Airbnb in London

## Canva

What really makes Canva stand out is not its culture or benefits, but the opportunity it gives to employees to contribute to the company and make them feel part of a creative open space where their contribution to the end designs feels very tangible. Of course, Canva does also offer good and usual benefits.

[Video](#): The culture of Canva



## What about SMEs? What if I am not on LinkedIn or Google? Can I work my Employer Brand?

Many SMEs that read about Employer Branding strategies of big companies might think that Employer Branding is not for them, but they are wrong. Employer Branding is even more important for small or medium sized companies to attract and retain the right talent.

By simplifying the concepts of Employer Branding and Employee Value propositions, we can make it more accessible and relevant to SMEs. Employer Branding is not as complex as it may first seem. Employer Branding is not about making cool videos, it is something more. It can be defined as the set of tangible and intangible attributes that a company has and that allow it to retain talent and attract new talent. Those attributes are intrinsic characteristics that a company has and form the basis of the EVP. Employer Value Proposition (EVP) is the perceived value that internal and external talent has about the company. Thus, every company has an Employer Brand, which can be developed and incorporated into its strategy.

A company's characteristics can be valued rationally and emotionally. Some aspects such as salary, developing opportunities or working hours are analysed objectively, but others, such as corporate culture, work environment, inclusive policies, work-life balance, or leadership style are totally subjective and have a bigger impact in the decision-making process. Therefore, it is important for SMEs to develop strong emotional stories to be competitive against bigger companies.

EVP can be broken down into the following 4 attributes:

**Business attributes:** these attributes refer to those characteristics of the sector of the company that can be attractive for talent. For example, it is not the same to work in the energy sector or in oil and gas. We usually cannot change these attributes, but we must bear in mind and promote them if they can be attractive and work on ways to give them greater appeal if they are not intrinsically attractive. If one company offers environmental services that have a clear beneficial impact on the environment, this must be clearly communicated in the Employer Brand Strategy. On the other hand, where a company is working in the gambling sector, it will need to take careful account of external sensitivities around addiction when planning their Brand Strategy.

**Company attributes:** these attributes are those characteristics that differentiate a company from its competitors. Let's take the last example again, the one of a gambling company. In this case, the sector may not be perceived well, but a company can develop Corporate Social Responsibility actions, like helping problem gambling companies. These actions can be communicated to improve the reputation of the company and to stand out from competitors when attracting and retaining talent. Company attributes are the ones that define how a company works. For example, company culture, leadership style, work environment, or HR policies.

**Professional attributes:** these attributes are the characteristics that an employee has in his/her professional project. For example, career opportunities, development, and training, etc. These attributes are very important when attracting or retaining talent. For example, if I work in a company that gives me training and helps my development, I will be less likely to look for other opportunities outside the company. On the other hand, if I feel that I am treated as a cog and I don't perceive that the company cares about my wellness, I will have little incentive to stay.



**Personal attributes:** these attributes are those characteristics that impact on the individual's life. For example, flexibility, family counselling policies, or wellness programmes.

Now we have covered the attributes that compose an Employer Brand, it is time to analyse your company. You can start internally by asking employees to give feedback on how they perceive the company's performance regarding these characteristics and how relevant they are to keeping them happy at the workplace. HR can analyse the results and establish if the perception matches with reality. By considering what employees value in their work environment and the things the company offers and lacks, an action plan can be developed. It is also important to consider external perceptions, so that you can attract new talent more easily.

Once you feel you know where your company is at, it is time to consider which attributes to promote in your company culture. You can then build an Employer Value Proposition and action plan that will incorporate some strategic attributes. As we said before, it is very important to establish KPIs to measure the process and the success of the action plan. For example, two good KPIs could be:

- Number of applicants when starting a recruitment process.
- Number of people that left the company in the last year.

Now it is time to communicate your new Employer Value Proposition. You should begin with a strong internal communication plan to make every employee know the EVP, and later communicate it externally (on the website, with a corporate video, statement, through social media etc.). It is important to consider that the best brand ambassador is a happy employee that speaks well about the company when he/she is not working.

Employer Branding is not about wasting money in digital campaigns or in a cool video. SMEs can develop a strong Employer Branding strategy with soft attributes that do not need to cost a lot of money. Additionally, SMEs tend to have greater flexibility than larger companies and can offer benefits that a larger company cannot. The key is to communicate the key messages that will promote a happy workplace and retain and attract talent.



## UNIT 2: RECRUITMENT STRATEGIES FOR TALENT ACQUISITION AND THE PERFECT RECRUITMENT PROCESS

It is important to understand the difference between recruitment and talent acquisition. According to the website [www.losrecursoshumanos.com](http://www.losrecursoshumanos.com), a portal specialised in HR issues, recruitment is a subset of Talent Acquisition, and includes search, selection, interview, evaluation, selection and hiring activities. Recruitment invites eligible candidates for existing vacancies available in the company. Talent acquisition instead, is a continuous cycle of processes related to the attraction, recruitment and hiring of employees within a company.

When talking about the selection process, Talentech breaks this down into seven steps in the following article: "*The steps of a recruitment process*" (Andersson, 2020):

### 1. Preparation

Firstly, consider the position you want to fill. You are the one who is going to establish the necessary skills that the new employee must have, so it is vital to fully understand what the vacant position entails. In addition, you need to consider how the opportunity is announced and how you can make it stand out as an exciting role in a great working environment. You will need to explain in detail what tasks and responsibilities are and who you are looking for to fit the job specification. Consider the language you use when preparing the job ad to ensure that the language is inclusive and doesn't appear ageist to either younger or older candidates. Consider which communication channels you want to use according to the target audience for the position.

### 2. Receive applications

Once you have published the ad, it is important to let those candidates who have applied for the job know that their application has been received. Many companies have an automated process through an ATS (Application Tracking System), but others continue to use email and excel as a way to carry out this task. Free digital tools can facilitate this tracking process such as Trello ([www.trello.com](http://www.trello.com)).

### 3. Selection stage 1: Weed out unqualified applicants

This is when the selection process begins. Firstly, you need to determine which candidates you think do not fit the role or your company culture. You can call candidates and ask some screening questions to help narrow down the candidates if you feel this is necessary. It is best practice to inform unsuccessful candidates that their application has unfortunately not been considered on this occasion.

### 4. Selection stage 2: Rating and ranking candidates

The next step is to choose those candidates that you want to interview, classifying them according to how well their skills match up with the advertised role and the company's core values. This stage within the selection process can take some time and careful consideration. If you do not have much time to arrange appointments, consider using an online appointment tool, such as Calendly when sending out interview invitations. Calendly, is an application that helps automate appointment scheduling (<https://calendly.com/>).

### Selection stage 3: Interviews

In the selection process, the interview is one of the most important moments, because the company will meet its potential future employees. It is advisable to carry out several rounds of interviews to help narrow down the best candidates and get to know them better and fully understand if they will be a good fit for the role and the company. The manager for the position should be part of the interview panel, so that they are able to ask some more technical questions about the job and check that they can build a rapport with the individual.

### Selection stage 4: Simulated work exercise

One of the best ways to find out if the chosen candidate has the right skills for the job, is to ask them to complete a skills-based exercise that simulates the type of tasks they will need to complete in the role. It may also be worth including potential experienced teammates on the interview panel to help judge the applicant's knowledge and fit with the team. This also has the added benefit of including the team in the selection process and therefore making them feel more involved in teammate selection if their preferred candidate is not the one that is ultimately chosen.

### Offer and tying off loose ends

Finally, when you have chosen your preferred candidate and they have accepted to join the company, it is time to notify the other candidates interviewed that they have been unsuccessful and that the position has been filled. It is best practice to give the candidate some feedback on why they have been unsuccessful and whilst they may be disappointed, they will be thankful to have a reply and understand why they were unsuccessful. Ultimately, most candidates will respect your decision and view your company positively if you have taken the time to come back to them. Alba Da Virgi in her article "Candidate-Centred Recruitment Strategy" (Da Virgi 2016), tells us that the centre of the recruitment process must be the candidate. She says that the way in which candidates interact with your company during a selection process is decisive for your company to be able to hire the best talent.

According to Alba Da Virgi, the following tips are key when recruiting:

- Write job offers in a direct and attractive way for the roles you are looking to fill.
- Disseminate the advertisement through the most suitable channel based on the profile of the position. The more exposure your advertisement gets, the more talented people you may be able to recruit, but ensure your advert targets the right people.
- Optimise your registration forms and make a short, simple, and responsive form so that candidates can also apply via mobile phone: You should take advantage of the benefits that technology brings.
- Keep your candidates informed during the selection process and establish a good relationship from the first moments: You want to give the candidate a good impression.
- Answer candidates promptly. If you do not give a fast answer, the candidate may lose interest in the position, and they may think that they are not going to be the chosen person.
- Send a reply to candidates that are not offered and interview as not doing so will not reflect well on the image of your company.





It is important to have well-planned and organised recruitment processes, and above all, to generate a good candidate experience. There may be cases where an employer has to say no to a very talented person because they are not the best fit for the role or company at that time. However, it is very conceivable that the same candidate may be ideal for a future opening when they may also have gained more relevant experience. If this candidate had a good experience of the company during the previous application, they are far more likely to apply for future opportunities.



## UNIT 3: TALENT ACQUISITION AND BUILDING TALENT POOLS

Firstly, it is important to explain what talent acquisition is. Obtaining talent is the procedure of seeking and obtaining a qualified individual for the needs of the company and to meet the requirements of the position. The challenge for companies is to find and attract candidates that meet the expectations and requirements that satisfy the objectives and activities of the company.

Nowadays every company is trying to hire the best talent in the market to join their teams and be more competitive. In addition, some more technical roles are in high demand. It is relevant to say that for SMEs, it is far harder to get good talent through the door, as many smaller companies do not have the necessary resources for dedicated HR staff. Often the recruitment and talent responsibilities lie with somebody who also has another primary function in the company. The following guidelines offer a very useful way for SMEs to carry out a branding strategy that allows them to attract talent:

- Improve your presence on social networks: Recruitment 2.0 will allow you to eliminate geographical barriers and find the ideal candidate. Social networks like LinkedIn have become an excellent database for finding talented professionals, whom you can even interview over a video call. You can also take advantage of these networks to spread your job offer and reach a greater pool of interested professionals.
- Develop your employer branding: SMEs must communicate the attributes that make their company an attractive and unique place to work.
- Be constantly updated: Offering courses or workshops brings great value to the company, as it increases the team's competitiveness, initiative, and innovation.

Building a talent pool is important for SMEs, as it can save a lot of time in finding candidates that are a good fit to positions and perhaps more importantly with the core company values. It is important for smaller companies not to lose sight of the talent pool already available within their own company as a starting point.

### HOW TO IDENTIFY TOP TALENTS IN THE COMPANY

When we talk about acquiring talent for companies, often existing talent within the company can be overlooked, so how can you ensure this does not happen in your company? The first step for SMEs is to identify those talented people within the company. According to Explicit Success and the author of their post, Abimbola Joseph (a creative content developer who enjoys encouraging people to be the best they can be), there are 13 tips to find that talented person (Joseph 2019):

#### 1. They are ambitious people

Ambitious people are always looking for success and work very hard to achieve the goals they set for themselves. It is important to know that these people are capable of achieving both victories and suffering defeats, but when they are defeated, they learn from the experience and come back stronger. Ambitious people have the personality necessary to become a top performer.

## **2. They focus on the priorities of the company**

The best talents want to participate in the development process of the company in which they work. They have the energy to work with passion and guarantee that projects are implemented in the best way in the company. They are ardent employees and go the extra mile to achieve the company's goals and objectives. Talented people know how to set priorities and what to focus on. They are not easily distracted and avoid wasting time. They can also multi-task.

## **3. They can tell you what they want to achieve**

A talented person knows where he/she hopes to be in a few years' time and sometimes gives you a surprisingly clear answer. You may be far from that goal, but talented people have already thought about your company's life path. A talented person can give you clear steps on how to get there, even if the goal is very ambitious.

## **4. They are proactive**

Every employer should look out for people who are proactive in their decisions. This trait does not rely on senior members of staff to give instructions before taking decisive steps when they are sure of positive results. They prefer being proactive and taking decisions before the boss asks for the outcome of a task. Proactive people can surprise their boss with the results. In some companies, proactive people are seen as overstepping their boundaries. Autocratic and domineering companies do not flow well with top talents like these. When they do not get the motivation or support, proactive people do not give their best. They help prevent slack and try to meet deadlines with or without the boss' involvement. Top talents are active thinkers and do not like to postpone an action that needs to be taken immediately. They can be easily identified when given a task and give results even before they are asked the outcome.

## **5. They have good interpersonal skills**

The personality of employees is an important consideration for employers. Not everybody is good at building relationships with colleagues. Some companies use personality tests to try to determine if a candidate's personality is a good fit with the rest of the team. The best talents are socially intelligent; they know how to build up a rapport with everyone. This is a very important skill for the development of any company. Talented people have good interpersonal skills that should be valued very highly.

## **6. They are good team players**

When it comes to identifying talent, look for people who know how to work as part of a team. Team players know how to work together with others and reach communal goals. In addition, they prefer to work in a team rather than doing it alone. A good team player knows how to devise strategies that will benefit effective teamwork and productivity leading to positive results.

## **7. They are skilful**

It is important to look out for people with a strong skill set that will be a good addition to the company. People with strong skill sets can be a very valuable asset as they can share their knowledge with other team members and help develop the skill set of those around them. For example, people with good ICT skills can impart their knowledge with colleagues and quickly find solutions to technical issues that may have taken others a long time to resolve. A skilful colleague can help a team become far more efficient.

### **8. They are effective communicators and listeners**

For a company to detect the best talents within it, it must look for people who have great communication skills. Employees who can communicate effectively and give their opinion to any person will help create a strong collaborative working environment. The best talents know how to negotiate in any type of situation. They also tend to be better listeners and have strong analytical skills.

### **9. They are emotionally intelligent**

The best talents are not guided by their emotions at work. They know how to manage emotions well and do not allow emotions to negatively affect their performance. In addition, emotionally intelligent people respect the opinions and values of other people. They can accept constructive criticism and learn from it. They also tend to work well under pressure.

### **10. They are problem solvers**

The best talents do not shy away from the challenges that the company faces. They do not dwell on problems and seek out solutions that are long-lasting.

### **11. They are highly creative and innovative**

To solve problems, the best talents use few resources. They are innovative people who know how to make something out of nothing. In addition, they are people who do not accept the status quo and for companies that need people that break the rules and innovate, they are necessary. These skills are also very important to face changes and to adapt to new scenarios.

### **12. They have a strong work ethic**

They are very ethical and positive people. In addition, deadlines are very important to them, and they will always try to meet the established deadlines. They are hard-working, highly motivated, and obey established rules.

### **13. Their record speaks for itself**

Talented people have influence in the lives of the people around them. If you have doubts about any talent, you can look at their academic and university records. When recruiting new talent, you should always contact their named references to ensure that they are as talented as they have told you they are during the recruitment process.





## HOW TO ASSESS THE TALENT

Once you identify talented people in your company, you have to keep in mind that they can ask for different things and if you want to develop them to be top talents, it is maybe necessary to know how you can assess their talent and identify any gaps. According to Clara Nieva (Indicadores para evaluar la gestión del talento en la empresa), there are indicators that allow you to tell if the talent at your disposal is a good fit for your company:

**1. Training time:** This indicator provides information on how to improve employee productivity by offering them the tools they need to improve professionally.

**2. Average time to achieve goals:** The average time indicator allows you to measure the efficiency of employees.

**3. Absenteeism levels:** This indicator is very valuable within a company as it allows you to read the motivation of the employee, their commitment in the performance of their work and in the operation of the company.

Hiring from within the existing staffing pool has some advantages, namely:

- Improvement of the working environment.
- Avoiding the loss of talent going to a competitor.
- Continuous growth and learning of employees that results in an increase in productivity at work.
- Increased performance of the workers because they want to achieve the proposed objectives.

There are many factors that can affect the company and cause a change in talent development strategies. In addition, it must be considered that the so-called talent wars will exist for a long time and companies must think ahead. In the future, companies should not only depend on external hiring to find the desired talent, but they should also consider talent within the company or even help to develop people and turn them into the talent they are looking for. For more information on approaches to internal talent development, please review Chapter 3 of this Handbook which is dedicated to employee development.



# CHAPTER 2:

## onboarding new talent

# INTRODUCTION

The process of integrating a new employee is crucial to a company's success. The goal is to integrate new talent as quickly as possible so that they become integral members of the team and are loyal to your company and stand by its values. A lot of time, energy and investment goes into onboarding strategies, so it is important that they are properly planned from the beginning. The sooner the employee understands the operational features of the company, learns about the company culture, understands the related frameworks and expectations, the sooner they will feel at home in their new work environment and the more likely they are to want to stay longer term.

In today's candidate-driven market where the competition for talent is increasing steadily, companies need to go above and beyond to attract the right employees that fit the company's culture. Optimising the onboarding process is one key strategy for improving your employer brand and recruiting better candidates.

Onboarding is an essential part of a company that must be managed carefully to help new employees adapt to your corporate culture, values, and work practices. Otherwise, the chance of facing high turnover among new staff increases, and the time, effort, and energy spent during the recruitment process is not lost. An efficient onboarding plan can facilitate the integration and socialisation of new employees and help them build loyalty to the company.

This chapter introduces what onboarding is and presents the 6Cs of onboarding that is useful and adaptable to SMEs; especially considering a diverse and multi-generational workforce. We go into detail on how to develop an Onboarding Strategy, before looking at the 4 phases of onboarding. Finally, we suggest an onboarding schedule for new employees and look at how to maintain and improve your onboarding plan to make it a success and lead to long-term employee satisfaction and retention.

We pay careful consideration to the 45+ year old new recruit and how the onboarding process might affect them somewhat differently. The older employee may not always be familiar with some more modern processes or technology, but they will usually bring a wealth of invaluable life-experience. An onboarding programme needs to take account of what an older new employee might need and of how best to get the most of their life-experience for the team during the onboarding process.





# UNIT 1: WHAT IS ONBOARDING AND WHY IS IT IMPORTANT FOR SMES TO GET IT RIGHT?

In 2010, Dr. Talya Bauer outlined the 4C's of Onboarding for the Society of Human Resource Management (SHRM). Since then, the model has grown and developed into the 6Cs of Onboarding. If a company follows the 6Cs of Compliance, Clarification, Confidence, Connection, Culture and Check-back successfully in their onboarding strategy; this should lead to new employees having a positive experience. The aim is to give employees an early experience of the company that makes them want to stay indefinitely. Companies that successfully implement the 6Cs in their onboarding strategy are likely to find employees are better aligned and integrated into teams and the company culture. This helps build stronger loyalty between employer and employee and can ultimately lead to a happier workplace for all employees, new and old.

Below, we go through each of the 6Cs in more detail:

## Compliance

Perhaps not the most exciting C, but compliance is important to set new employees up correctly for their future with your company. This step involves completing all official paperwork, contracts and taking employees through initial administrative tasks, such as the employee handbook. During this process, it is a good idea to use the opportunity to highlight pay-day, holidays and any specific benefits that might be particularly attractive and show that you care about your employees. For example, some companies might give their employees an extra day of annual leave on their birthday or offer family-friending initiatives. First impressions count, so by highlighting this type of benefit on an employee's first day, you can already make them feel like they are having a positive experience.

## Clarification

For an employee to be fully motivated in their role, they need to understand the role they are taking on and what is expected of them. New employees should feel that they have good information on what they are doing and how, but also that they can get clarification from management and their peers and colleagues. It is important that employees feel encouraged to ask lots of questions when they are new to the company. If managers are friendly and approachable to their team, staff should be happy to ask questions and clarify that they are doing things in the right way. This last point is also likely to resonate particularly with 45+ year olds, who may feel that they should already have enough experience and knowledge to the job from the word go. If you can emphasise that questions and clarification are encouraged and considered important, it will also go a long way to help "older" new recruits feel they can ask, without feeling that they should already know what they are doing.

## Confidence

Normally it will take several months for an employee to get a good grasp of how to complete tasks and what is expected of them, especially if they are entering a new industry. Once an employee begins to show signs that they have a good idea of what they are doing, they should be encouraged to share their own experiences with colleagues and in group discussions. Even if they only started yesterday and they don't have a clue what they are doing yet, there is a good chance that new starters could contribute to group discussions with some of their previous work and life experiences. Encouraging open discussion from the beginning and a "there are no stupid questions" ethos will help new employees feel comfortable to contribute their thoughts and ideas.

This should lead to them feeling a good confidence boost. Older workers will already have a lot of experience from previous positions and life generally. If they feel able to share their knowledge with colleagues and feel it is well received, this will only help increase their confidence in their ability to do the role and be a part of the Company. After employees have been in the role a few months and they have relevant experience to share, this can then empower them to share their newly found knowledge with the rest of the team.

### Connections

The fourth C is all about the relationships new employees have with their colleagues. Managers should understand the successful onboarding of new members into a team is vital to its success. When a new member of staff joins a team, it will inevitably change the dynamic. Existing team members may feel apprehensive or nervous about the new team member and how they will fit in. The key is that teams are prepared for any new arrivals and that new arrivals are made to feel welcome. When a new employee joins a company, it is a good idea for their manager to organise an external team event, such as a lunch to help them bond with other team members. New workers should be introduced to all relevant colleagues they will be working with from across departments, so that they can build a picture of who is who and where they fit in the company. The sooner a new employee feels part of the team, the more likely they are to want to stay and contribute.

### Culture

Company culture is essentially the personality of your business. What does your company stand for and how do external people perceive you? A strong company culture will help accelerate onboarding and should help new employees understand very quickly how they are expected to behave and which principles they are expected to uphold. Normally new employees will be given a brief idea of the company history and how the company was formed during their induction process, but for the company culture to be truly embedded in employees' minds, the clear values, vision, and any mission statements should be regularly communicated. Communication of company culture should not be purely official. For example, any mission statements or key values and vision should be visible so that employees see it every day. Reminders of what the company stands for might feature in the boardroom, but should also be visible in non-formal settings, such as canteens or coffee stations, so that they are constantly recognised and reinforced.

### Check-back

The final and most recently added C is "check-back". This step is essentially about gathering feedback from new employees on the onboarding process and their experience. Informal check-backs should be carried out by managers on an ongoing basis to ensure that new employees are settling in and happy in their new environments. This allows for any misunderstandings or clarifications to be made. Once an employee has passed their initial probation period or has been with the company for a period of 6-12 months, where possible they should give more formal anonymous feedback on the whole onboarding process. By collecting such feedback from new employees, you should be able to determine where your onboarding strategy is working and what more you could do to improve it and give new recruits an even better start to their journey in your company.

As a final thought on the 6 Cs, the growing trend towards e-working and blended-working set ups can make their implementation far trickier than in a traditional office-based set up. When onboarding a new remote-worker, careful thought needs to be placed on how each of the Cs will work and how the e-worker will be successfully integrated into the team. Questions you may need to ask yourself when onboarding new remote workers might include:

- How will you ensure they have a positive experience with mundane compliance tasks?
- What is the best way to ask them to communicate if they have any questions about the role or associated tasks?
- How will you make them feel part of the team and ensure remote teammates build a connection with them?
- How will you ensure that they see, live, and breathe the company culture every day?

### Developing an Onboarding Strategy

In today's candidate-driven market where the competition for talent is increasing steadily, companies need to go above and beyond to attract quality employees. Optimising the onboarding process is one key strategy for improving your employer brand and recruiting better candidates. This is your first impression and your chance to lay the groundwork for the rest of your new employee's experience with your company. By the time onboarding is finished, your new employee should have an in-depth understanding of the company's culture and values and should have a good idea of what is expected of them in their position.

After a new employee has accepted the job, companies naturally have in mind the employee's future value to the team when they become proficient and confident in their role. The workplace onboarding process should enable companies to help new employees reach their full potential and to become efficient and good at their job.

It is important to get the onboarding process right to attract and maintain top talent. Smaller firms with less employees will often find it much easier to adapt their onboarding strategy according to their experience of what works to build loyalty. That is not to say that larger firms shouldn't do so, but changes may need to be handled more progressively.

All business owners should consider the following if they are to provide a good onboarding experience to new employees:

1. Create and develop an onboarding plan
2. Implement a formal integration process
3. Set realistic initial expectations
4. Explore social engineering
5. Encourage feedback from new hires

#### 1. Create and develop an onboarding plan

A good onboarding plan is an important first step if business owners want to make sure that new employees integrate smoothly into the company. Take time to create a solid onboarding framework including an induction programme, training plan, manuals, and tools etc. Make sure that the plan will enable new employees to learn and develop the necessary skills for the role in a realistic timeframe for the company and the worker. You should try to ensure your onboarding plan is relevant to all workers young and old and of diverse backgrounds.



The onboarding plan should not be regarded as set in stone. Where strategies are ineffective or it becomes clear that the intended result is not being reached, they should be adapted accordingly. As companies adapt and change in the workplace becomes more common in a post COVID era, so the needs of employees change. It is also important to invest time and effort in teaching trainers how to properly onboard new employees and make sure that they are comfortable in their new working environment.

## 2. Implement a formal integration process

Having a formal integration process will make things easier for small businesses especially if they do not have enough resources to ensure proper integration for every new hire. Business owners can choose to seek help from their employees for onboarding purposes, with each employee representing a specific onboarding function. Learning from peers has the added benefits of enabling the new employee to bond with teammates and empowering the existing employees to pass on their knowledge of the company and the role. Types of onboarding tasks that could be shared out might also include things that are not role specific, such as preparing the new employee's desk, doing the induction tour of the company, introducing the new employee to other members of the team.

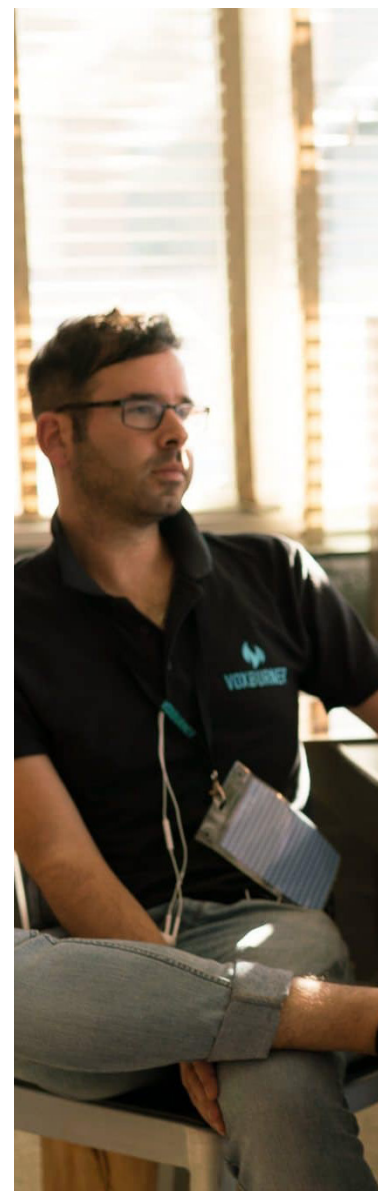
## 3. Set realistic initial expectations

You should bear in mind that newly hired employees need some time to understand their new roles. To this end, it is important to set realistic expectations during the first few weeks as they start to learn what is required of them and ease themselves into the demands of their new position. You want to ensure that your new people are not overwhelmed and that they have the time to learn and understand the specifics of the job.

When setting initial goals for new employees, they should be easy to achieve. As the employee gains experience and confidence in the role, goals can then be extended in-line with initial review periods. A gradual increase in expectation throughout the initial period of an employee's time in the company will allow them to develop quicker and become an integral part of the team. Ideally the transition of goals should appear seamless, so that as the new employee gains confidence in one area, they continue developing their skills and moving on to a higher level without feeling any more pressure or stress than they did initially.

## 4. Explore social engineering

Social engineering is a great go-to for business owners who want to make sure that new employees are comfortable and integrate successfully into their new team. Business owners can seek the help of other employees to ensure the new staff are included in team social activities. If there is a group that plays sports after work for example, they should be encouraged to invite new teammates to join them. If some employees go for a drink on a Friday night, new employees should be asked to come along too. Managers have an important role in setting the social tone of their teams as well. Whilst it is perhaps better if a team chooses to socialise without input from the company, if managers organise a few lunches or evening's outings, it sets the tone for the team to want to socialise and integrate new members.



Buddy systems can also be a good way to encourage greater social interaction between new and old team members. Typically, a new employee would be buddied-up with a more experienced colleague in the same or a similar role. The experienced employee will typically help their new teammate learn about the company's culture, rules, regulations, and some of the ins and outs of their new role. This peer-to-peer style learning can prove very effective as the employee works closely with a colleague in a similar role and it empowers the existing colleague to pass on their knowledge and experience to the new person. Buddies will normally form a good bond, which should then help the new employee to feel part of the existing team. You can ask the experienced employee for feedback on how the new employee is getting on and this will help you foresee any learning gaps and what their strengths and weaknesses might be, both in the team and their role.

Partnering older 45+ year old new recruits with younger experienced staff can prove very beneficial for everyone. The experienced colleague will be able to show their new older colleague the process, thus increasing their confidence in their own ability and performance in the role. Meanwhile the new recruit will be able to impart some of their life experiences on their young, experienced colleague, helping them to learn life skills and also making the older new hire feel valued.



### 5. Encourage feedback from new hires

Business owners should encourage feedback from new employees especially during their first three months of employment. Feedback can range from the onboarding process itself, their initial impressions on the working environment and the company culture, to opinions regarding their workload and work goals. Regular catch-ups will show that you care as an employer and genuinely want to see that the employee is getting on ok. As the employee progresses in the business, you may consider reducing the frequency of catch-ups.

A solid feedback system will allow employers to make improvements in their onboarding process and help them better cater to the needs of new employees. You may also want to consider providing training on giving feedback. Ideally feedback should be given and received in a positive way. Feedback should not be personal, but employees and employers should feel that they can give constructive feedback on areas that both workers and the Company can improve and grow.

## UNIT 2: THE 4 PHASES OF THE ONBOARDING PROCESS:

### 1: Pre-onboarding

Pre-onboarding begins when you offer someone a job and possibly even prior to this towards the end of the interview. When you have decided which candidate you want to recruit, you want to make sure they feel happy and excited to join your company. You can already show a new employee what a great company yours is to work for when you call them to offer the job. After you have offered the job, if there is any negotiation on salary or conditions, you should show some flexibility where possible. It is probably worth paying a little more for the right candidate and you don't want a new employee to start their new role feeling undervalued before they have even started. Once all has been agreed, make sure you send the new employee a letter of offer with the agreed conditions and make it clear that you are available if they have any further questions.

If you are hiring somebody who is currently in another job, make sure you give them enough time to finish everything up properly with their previous employer. In most cases, you would probably like a new employee to start tomorrow, but if you give them the time they need to finish up with their previous employer and to complete any handovers and exit tasks, they will be thankful. You should also be understanding that a new employee may wish for a small break before starting, especially if they were busy exiting their previous role. Allowing for a short break period before the employee starts will enable them to recharge the batteries and be better focussed on their new challenge in your firm. If you make a point of suggesting this when hiring the employee, they will already see that you care about their welfare and are a good and trust-worthy employer.

A new employee's personal circumstances are an important consideration. Are they relocating and do they need help in finding somewhere to live? Do they need help figuring out their commute? Will they need flexible working hours so they can do the school run with children in the morning? It's important that your new employee's work life fits in well to their existing home life. If you show that you care about their personal circumstances and that you are there to support them, it will help them feel more welcome.

### 2: Welcoming new employees

Keep the first day as simple as possible. During orientation, help the new employee gain a better grasp of your company culture and show them how your work practices are aligned with this culture. You will need to discuss compliance tasks, such as time off, attendance, medical insurance, and payroll policies, but try to keep these interesting. Remember to highlight any benefits that set you apart from the competition in a positive way.

You should make sure your new employee gets a tour of the workplace and knows where to find the canteen/kitchen, toilets, and any other relevant facilities. The main purpose of a tour of the office should be to meet teammates and colleagues. Staff that will be working closely with the new hire should already be aware that they are starting and know where they are going to fit in the team. It is a good idea to organise some form of informal get together with teammates on an employee's first day, such as a team lunch.





The background of the page features a dark, textured surface. In the upper right, there are vibrant, glowing blue and purple light trails that swirl and flow across the frame. In the lower left, a person's hand is visible, resting on a laptop keyboard, which is partially illuminated by a soft blue light.

### **3: Role-specific training**

The training phase is one of the most important phases of onboarding, and it is directly correlated with how successful new employees will be at their jobs. Your training programme for new employees should be carefully planned and thought out so that they will be best equipped to fulfil their new role. Without formal training, your employees may not know what it takes to thrive in your company.

Digital Learning Management Systems (LMS) have become a popular self-learning tool for companies. If you have an LMS, this can be a good way to allow employees to familiarise themselves with your company's practices and for role-specific training at their own pace or at the comfort of their own desk, but self-directed learning should be accompanied by some face-to-face training too. 45+ year olds may also be less accustomed and comfortable with this form of eLearning, so it is probably a good idea to have a downloadable and printable version of any learning manual to also cater for the older new recruit.

Face-to-face training will of course require the time of another colleague or teammate, but it will pay back in the performance of the new employee. An experienced employee will normally want to help a new teammate fit in and will have invaluable on-the-job information and experience that they can pass on to their new colleague. Where an existing employee is involved in the training process, this employee will also feel that their expertise is valued. Try exploring different types of learning techniques, such as blended learning, self-paced learning, microlearning, and more so that your new employees can select the style that they are comfortable with. Any onboarding learning materials should be stored safely in a place that employees can easily access and refer to at any time.



#### 4: Easing into the new role

The last phase of onboarding is intended to help employees go from being a new hire to a fully integrated member of the team and company. You should encourage managers to set clear expectations for new team members, so that they fully understand their responsibilities. Managers should regularly check in on new staff to see how they are getting on. This should be done in an informal setting, whereby the employee feels able to honestly state how they are, how they are finding the work and voice any difficulties, frustrations, or queries. This acts as an opportunity for managers to encourage the new employee to do things in the right way, but also to make them feel they are doing a good job and progressing well.

It is also a good idea to set SMART goals with employees to help them better visualise what success, quality, and productivity look like in your company. Using SMART goals will help evaluate how a new employee is performing and where they might be struggling or need to improve. Regular performance reviews linked to targets will enable new staff to understand their performance better and to know which areas or tasks they need to improve at to be a success in their new role. If you are using SMART goals and objectives with your employees, this should also help them focus on the most important elements of the role. If using SMART goals at an onboarding stage, remember not to be too ambitious with objectives – they must remain attainable and be fully understandable for the new employee.

When planning your onboarding strategy, it is important that the new employee receives enough, but not too much information. If you tell them everything about the company and role on their induction day, you cannot expect them to retain it. You should consider having an information pack about the company and culture that new employees can constantly refer to. Typically, this might include the company's mission, values, activities, goals, relationships, code of ethics, safety information, code of conduct and contact information. Similarly, if new staff receive a training pack with key information on their role and the elements that they are going to need to learn, this will help them gain confidence in what they are doing and who they need to talk to if they need help.

## UNIT 3: DEVELOPING AN ONBOARDING PROGRAMME

An onboarding programme for new employees can range from one day to half a year. Usually the programme will be in-line with a probationary period, by which time the company expects new employees to have a good level of understanding for the role and to be doing a good job. Even at the end of the onboarding programme, employees may need to refer to their earlier training and re-learn tasks they have done less frequently.

A strong onboarding programme will improve hiring rates, reduce employee turnover rates, and help employees integrate into the team and your firm. A successful onboarding strategy will lead to increased employee productivity and hopefully a positive culture and working environment. Some key elements of an onboarding programme should include:

- Consciously promoting the integration of the new workforce, introducing, accepting, and becoming part of the company's culture
- Promoting a harmonious relationship between the manager and the employee, establishing balanced employee relations
- Developing the ability to work responsibly and independently, e.g., transferring information and knowledge necessary for the performance of duties
- Creating the conditions for high-quality work planning,
- Ensuring continuous development (training).

If you are able to cover the above points, you should be able to build a smooth process of onboarding for new employees into the existing team. By giving a good onboarding experience to new employees, you should be able to make them feel safe, motivated, happy, and ultimately loyal to your company.

### General and personalised elements of the onboarding programme:

General elements (applicable to all employees):

- General presentation of the workplace,
- Company roles and responsibilities
- Performance appraisal, opportunities for advancement and career building

### Tasks related to the training of the new employee

The most common training after employment:

- Vocational training, where the aim is to acquire some theoretical knowledge or practical application relevant to the role and industry
- Skills development training helps to develop competencies related to work performance
- Team building training to build relationships, i.e., to integrate the new member within the existing team
- Special training to support the onboarding of employees with additional needs in the workplace



## SUGGESTED ONBOARDING SCHEDULE

### Pre-boarding

- Call the candidate to offer the job and negotiate terms where applicable
- Send a letter of offer with agreed terms and welcoming the new employee
- Prepare new employee's schedule
- Assign the new employee a buddy and/or a mentor
- Schedule training sessions for the onboarding period

### Onboarding – Day 1

- Organise a tour of the company
- Talk the new colleague through the company culture
- Introduce team members, the buddy and/or mentor
- Ensure they have received all IT and administration related items, equipment, and anything else that is needed to perform the role.

### Onboarding – Week 1

- Follow up on any questions the employee may have
- Ask new employee about their experience of the first week at the workplace
- Talk to the employee's buddy and/or mentor about their first week
- Discuss immediate and future training requirements

### Onboarding – First 3 months

- Assess performance and progress of the new employee
- Complete initial training and prepare for future training
- Increase responsibilities based on experience and newly acquired knowledge
- Define short-term and long-term goals
- Assess employee's performance and consider their possible career path in the company

### Onboarding – First 6 months

- Review short-term and long-term goals
- Complete a 6-month performance review
- Ensure employees fit the work culture

### Onboarding – First Year

- Review performance
- Review training needs and prepare a new training plan if needed
- Revisit short-term and long-term goals and discuss their career path in the company



During the onboarding period, objectives are usually accompanied by technical assistance from the immediate supervisor and/or the team. It is important that professional assistance and coordination is complemented by continuous feedback. Constructive feedback will help new employees learn and improve their professional work, and positive reinforcement and praise can reduce tension, insecurity, and increase the self-confidence for any new starter. The frequency of feedback will normally decrease as the onboarding period progresses, giving the newcomer more autonomy and responsibility over time. Allowing employees more independence and greater responsibility conveys the message that you are satisfied with their work and attitude and will help them gain confidence.

**Short-term** tasks surround welcoming your new employee and helping them settle into the company's culture and team. This includes the pre-onboarding process, compliance tasks, introductions, and orientation. Basic company information and any relevant training programme or schedule will normally be shared with new recruits at an early stage.

**Medium and long-term** tasks include professional coordination for the new employee, which includes the appointment of a mentor and full oversight of the learning process. During the medium-term tasks, it is necessary to return to the competencies formulated during the selection process. Based on how the new employee is performing against these competences, you can assess the need for additional training. In the long run, it is important for a leader to recognise the career development potential of a new entrant and develop a "year-long onboarding programme" for them.

The onboarding period can only be considered closed when the employee is fully integrated within the team and independent and competent in their role, making a valuable contribution to the company. The annual performance appraisal especially in the first year serves as a good opportunity to review where the employee is at and what they need to do next on the path to continue to be successful in your company.

## IMPROVING THE ONBOARDING EXPERIENCE

Onboarding processes are rarely perfect the first time, because it can be hard to put yourself into the shoes of someone who knows nothing about the business. As a result, the steps in your onboarding process might initially overlook basic facts about how the business works. You may also find that some steps in the process just did not work for a variety of reasons.





It is vital to collect feedback from new employees after the onboarding process has finished and once they have been in the job for six months. This gives new recruits the time to really think about what was valuable and anything they wish they had known earlier in the process. Employees need to understand that their constructive feedback will help you improve the onboarding process for future colleagues. Below are some examples of common problems and the solutions you could use:

***“I got stuck on something, but my line manager was really busy.”***

New employees often worry about asking too many questions, particularly if their manager looks occupied. You should emphasise that no question is a bad question and try to encourage a feeling of openness and approachability in your culture and management structure. A buddy system is also a good way of giving the new recruit a regular contact that is doing a similar role to them and may appear more like a peer and therefore less intimidating than a manager. Buddy systems have the added benefit of allowing the experienced buddy to impart their knowledge and experience and improve their confidence in their own role.

***“I didn’t understand the workplace acronyms but felt too embarrassed to ask.”***

Workplace acronyms are commonplace and rarely mean the same thing from one company to another. It’s a good idea to include a list of the most common acronyms used in your company in the new employee’s welcome pack or training programme, so they have a reference point if they don’t know what an “ABC” is or where to find the latest ZYX report.

***“I had to work with other people but hadn’t met any of them before.”***

As previously discussed, it’s a good idea to encourage socialisation among staff and semi-structured planned activities are a good way to make it easier for new staff to get to know their colleagues. For example, you might share cake with employees to celebrate birthdays, or you might organise a group game within the company on a Friday afternoon. Larger team-building activities are also a good idea at least once a year to allow colleagues to unwind and socialise in an informal setting and hopefully get to know each other a bit better in the process.

## **Better onboarding**

Implementing talent management strategies to better support your onboarding process, enables you to actively engage with your employees from day one. Providing new starters with the opportunity to immerse themselves in your culture, rather than being stuck behind a desk with countless training documents, will establish a stronger relationship between employee and company. Create an onboarding process that focuses on company culture and positions you as an engaged employer. Utilising employee engagement as a retention tool will result in increased retention levels and lower employee turnover.

## **Improved performance**

Utilising talent management strategies to consistently engage employees, will ensure a downturn in absenteeism and an increase in productivity. Employees who feel engaged with their work will naturally strive to help their companies realise their strategic goals, often going above and beyond the remit of their role to achieve this. Effectively implementing strategies that foster high levels of engagement, will nurture a high performing culture, where employees feel engaged with company operations and committed to producing high quality work.



Onboarding is a key part of the Talent Management process. This is your opportunity as an employer to impress new employees and give them a lasting first impression and positive start to their time with your company. If you get your onboarding strategy right, it will set you on the right path to retain the best talent and to provide new employees with a path to grow and develop their careers in your company, which should lead to long-term success for both employer and employee.

When developing your onboarding strategy, you should carefully consider the 6Cs of Compliance, Clarification, Confidence, Connections, Culture and Check-back. These elements will all help when devising your plan and working through the phases of the process from pre-onboarding right through to easing your new colleague into their new role. Ultimately you want to strive for a process that allows new talent to fully integrate into your existing set up in a positive way that helps motivate existing staff as well as your new employees.

With reference to 45+ year olds, consider how their needs might differ to younger people when developing your onboarding strategy. Where a younger person may have better technical skills and knowledge, the older employee will have more life-experience and knowledge. It's worth thinking about how you are going to support the older worker with specific tasks and technology they may be less accustomed to, but also how you can exploit the knowledge and experience they have gained over their working career to your company's benefit.

A well organised onboarding programme will include well devised targets based on short, medium, and longer-term tasks that are all intended to provide a smooth integration of the new recruit into their team and your company. It is important that onboarding strategies are evaluated and revised as necessary according to the ever-changing work environment. At first, implementing a new onboarding strategy will inevitably mean a lot of work and change for management and/or HR, but ultimately if you can successfully integrate new skilled talent into your workforce, you will reap the benefits of a happier culture where employees are motivated to do their jobs well and stay with your company long term.



# CHAPTER 3:

## developing talent

*“An employee’s job is to give his or her best work every day. A manager’s job is to give the employee a good reason to come back to work tomorrow.”*

*– Liz Ryan, CEO, and founder of Human Workplace*





Working with the best is what you desire as a manager and when you are professional in your approach to attracting and onboarding employees, chances are you are on the right track. In order to maintain this, you need to give your employees a reason to come back to work every day and be productive. As a manager you therefore need to provide learning and development opportunities that tap into the skills and interests of your employees, especially in the challenging labour market of today. Providing opportunities for each employee to develop their skills, use their talents, and progress to take on new roles is the challenge. Using their ambition and desire to do well within the company is the win-win outcome.

In this chapter dedicated to developing your talent, we will focus on the following unit:

- **Unit 1: Life-Long Learning and Development Strategies**
  - o Recognise the skills shortages that are faced by SMEs
  - o Identify the benefits to the company that upskilling and reskilling opportunities can provide in order to fill skills gaps.
- **Unit 2: Delegating responsibility**
  - o Examine the role that delegating responsibility plays in talent optimisation, professional growth and improve workplace efficiency.
- **Unit 3: Career Management and Progression**
  - o Highlight how Personal Development Plans can support workers to develop within a company.



# INTRODUCTION

We have read in the previous chapter, the importance and value of onboarding new employees well within your company's culture, structures, and processes. But what about the employees who have been with your company for a few years? Of course, you can assume that they know what they are doing, but there might even be a chance to equip them with yet better knowledge and competences. This is where the development aspect of talent management comes in. It is an essential part of the cycle of talent management that is presented in this handbook. One of the leading consultancies Deloitte, defines talent management as an organisation's commitment to recruit, retain and develop the most talented profiles available in the job market' (Hocking, 2019) while also considering global demographic changes, enlarging skill gaps and a new, more flexible generation of digital natives entering the job market. This demonstrates the essential part that development plays, not just for new but also for existing and older employees.

However, while recruitment and onboarding seem unquestionable in today's daily business practices, the development aspect that comes afterwards is often overlooked. It builds the groundwork for any future growth of your company. In a dynamic and challenging labour market that we are currently experiencing, that requires new skills all the time, as a company owner you need to tap into the assets you already have by investing in training and developing your existing employees to meet your operational demands. In doing so, you can hold on to your talented employees, rather than facing the costs of hiring and training new staff members. This is especially true for SMEs that have fewer employees. Losing a talented employee can be stressful and can result in a significant dip in productivity, while recruiting a new person can be costly and time consuming. The most valuable asset that a company has is its employees, therefore providing development opportunities to all employees seems like a no-brainer. If you have employees that have a long service history, they have acquired knowledge and skills in their professional work as well as their personal life over the years, they are the company's very own treasury of tacit and practical knowledge that ought to be valued and retained.

Long serving employees need to feel valued and challenged. Their mental, physical and digital abilities need to match their position. Providing older employees with development opportunities does not only better their satisfaction level, but also ensures their knowledge and skills are kept within your company. Redirecting those long serving employees to other positions could be beneficial to the company and be a much-needed challenge to these employees. This strategy can work well with employees over the age 45+ where retention of older staff is important. Making use of the tacit knowledge that older workers have and passing this knowledge on to younger employees is exactly what a progressive successful company does. This model can save you time and money in the recruitment process. The development makes the existing employees comfortable with a new and valued role. Furthermore, you know you have loyal employees in the new position who already know the heartbeat of the business. Increasing employee satisfaction while providing development opportunities to an employee who was not a perfect fit for their role before, can be rewarding.

In identifying the most suitable development opportunities for existing employees, it is necessary for the HR lead to have a structured approach for creating development plans for all employees – including those aged 45+. If the plan addresses all staff members at the right time of their career and ensures an ongoing learning process, it familiarises the employees with the training processes and makes the job more sustainable. Additionally, it allows you to tailor the development processes to each employee, meeting their specific needs and demands and avoiding generalised training that costs often more than it brings. In establishing a development plan in your company, you can match your employees' needs with those of your company.



Offering development opportunities to existing employees has a number of advantages, namely:

- Making use of the knowledge and valuable assets already available within the company.
- Working with loyal employees that know the company
- Ensuring employee satisfaction which leads to more successful and sustainable companies
- Avoiding a drop in performance of older employees when new challenges arise
- Saving money as opposed to hiring and training new people
- Adapt training to specific needs rather than generalising

## UNIT 1: LIFE-LONG LEARNING AND DEVELOPMENT STRATEGIES

It is no secret that the labour market changes rapidly, and new skills and different approaches are demanded from your workforce. Be it digital skills in a more and more technology-driven work environment or social and soft skills to be able to thrive in creative and innovative contexts. Often in SMEs with smaller workforces and the individual employee often taking responsibility for more than one role, this presents some challenges.

There are two ways of dealing with this challenge, the first is to simply do nothing, but in reality companies that fail to act, will ultimately struggle with the challenge indefinitely. The idea that the market will regulate itself and no planning in the sense of talent management is necessary is rather widespread. Companies following this direction rely only on outside hiring. When a position is open, they look for new people to come in. However, with fewer skilled workers available this has already become difficult and will be further exacerbated into the future. Professor of Management, Peter Cappelli therefore advises to keep your own employees and develop them to match the need from within – option 2.

Developing employees is not a new concept and has been around for decades, however the development process and the approaches therein have and continue to evolve as highlighted in the image below:



Businesses who elected not to put in place a development plan for hiring new staff relied on the concept of hiring as many new employees as possible to replace the loss of experienced employees to competitors. This seems almost like a vicious circle and shows clearly why you should have a talent management system that matches your needs and essentially provides you with the talent you require through a balance between outside hiring and developing the talents of your valuable existing staff.

While the former can be faster and cause an immediate reaction, the latter is generally cheaper and causes less friction. It will also tie your employees into your company as they grow with it. They will have reassurance that they are an essential part of the company and its success. If the development approach also includes their personal aspirations, they are likely to feel valued and perform well, boosting the company's success rate.

## HOW TO ORGANISE YOUR EMPLOYEE DEVELOPMENT APPROACH TODAY

Mapping out careers for the future does not seem feasible in today's labour market, where the adage of a job for life no longer exists. In today's ever changing jobs market it can be an advantage to gain valuable experience from taking employment opportunities from different companies and building up knowledge without older influences. Bearing this in mind, for an employer it is important to recognise the talent that you have in your company and have a development strategy for all employees. To start with, it is important to determine the status quo of your talent pool and their needs. Using this information you can estimate which talents you should keep and how this can be achieved through developing your employees further, accommodating the older and the younger employees – and which processes you need for this result. So, let's get started:

### 1. Know your needs – and talents

To ensure your development measures are worth the effort in time and money, they need to match the company's needs. What you need to have for this is knowledge about the roles in your company and the talents required for them.

*Ask yourself, what structures need to be there to be successful now and in the future?*

Once you know that, look at your staff and figure out together which talents are already there and what talents are needed. By putting this practice in place, you have already made a huge step forward. Now you can decide a timeframe for this to be successful for the company structures, management and strategies that are not likely to change. Although you can never fully know when an employee might leave the company, try to pick a period in which they most likely will still be working for you. With more and more development this period might increase. This is also the reason why it is important to involve the staff in this process. When employees feel like an essential part of the company, the measures are more likely to become a success. Telling them how it fits into your strategy also ensures they see themselves as relevant for the company's continuation. From then on it is a question of constant upskilling and regular check-ups and adaptations.

### 2. The development needs questionnaire

Developing your staff is time-intensive and can, compared to outside hiring, be more expensive in the beginning. However, when integrated into this strategy and with a well-designed process behind it, it can save you both time and money for the future. Once established, many processes can continue successfully without too much interference from you as a manager or business owner. Monitoring this new way of working on an ongoing basis is essential however.



To get to this stage, you need to determine which actions you plan to implement. Communication with your team is important to determine the strengths and weaknesses that exist. Although this process can be highly specific depending on the result or role you have in mind, there are some general measures that help you structure your thought process.

To find out if a development process is advisable, you can create a set of questions to help in this process. This way you rate situations similarly. These questions are based on Cappelli, 2008 and can be phrased differently to either take account of the changes in your sector (external) or ways of doing things (internal processes). The following questions are aimed at your internal processes and routines:

- How long will you need the talent for?
  - Estimate the length of time a specific talent will be required for. Is it only a short term? Is it long-term? Is an end foreseeable?
- How soon will you need them?
  - Is it on short notice? Do you have a longer period to plan? How busy is the time in between?
- How accurate is your estimation of the time you will need the talent?
  - Do you have a reference for the estimation? How much data does it rely on? How many other people can influence the estimation?
- How relevant is the development for the progression of the company?
  - Do you need the development to remain profitable? Will it support you in your growth? Is it one of your core areas/resources?
- Can the candidates learn the skills on the job from other more experienced colleagues without pausing their work or other investments?
  - Do you have enough experienced colleagues to mentor them? Are they willing to do this? What do they need to be able to do this?
- How important is the continuation of your current company culture?
  - Do you want it to continue? If a change is desired, what should it look like? Is the team willing to participate in any change?

In general, if the talent required is on a long-term basis it will be a positive and valuable development within the company. The respective person has already committed to your business, knows the processes and can continue to work while developing. The same is true for an accurate estimation (for planning), possible learning on the job (easier to do with familiar colleagues) and a maintained company culture (known to each employee).

These questions should always be asked in the future tense rather than the present. With the changing labour market and an increasing focus on digital technology, you are likely to see the creation of new jobs you have not needed previously. They will replace older jobs, leaving a skills gap. Hiring entirely new people for these new jobs and letting go of the older ones is simply too expensive. Instead of overburdening your HR personnel with a big recruitment load, plan ahead now and develop your employees to move from their old to their new job. Your future success is the basis of your talent management strategy, involving your existing staff.

### **3. General training as a base layer**

This process is valid for the individual training but also for upskilling a whole team or even the whole staff. After working in a company for some time, there is always a new skill – be it hard or soft – to learn. The World Economic Forum even predicts that machines will do half of the jobs currently done by humans within the next four years (Hocking, 2019). While this eliminates many jobs, it also opens up new opportunities for employees to require new skills such as creativity, imagination, and social intelligence.

For this reason, it is advisable to introduce general training for certain groups of employees within your company. After completion, you will be informed and have a better understanding about which candidates possess the necessary talents and should be developed further, you also shorten the time frame of the next forecast, making this more accurate and more reliable. When all staff members have received general training, the following development can be more specific, filling the skills gaps better and thus ensuring the survival of the company. Additionally, general training can also show employees' talents in other areas that were previously overlooked as they were not needed in the original role and can now fill gaps in another part of the company. This flexible approach is especially relevant for SMEs when ensuring that the training prepares for several roles with a special focus on 21st century skills (digitalisation etc.).

### **4. Be prepared for disruptions with the help of your employees**

With remote work becoming more and more prominent now, the need to develop new digital skills has surprised many businesses. While ad-hoc reactions and spontaneous coaching together with new software have counterbalanced these needs to some extent, companies with a digital strategy were generally better off. This shows that having a basic skill set, constantly reviewed, and adapted to the needs of the time, ensures a smoother work process for the entire staff in times of disruption.

Looking at your status quo report about the needs and talents in your company, also determine which skills and competencies will be needed by all team members in the given time. Again, include the employees themselves in this process. Some might already possess these skills but since they have not needed them in their work before you are unaware of this. Developing these forgotten skills requires less effort for a positive outcome. Additionally, you can use the cascading approach where employees can support their colleagues in learning new skills which not only helps team spirit but also is rather cost effective.



## **5. Keeping the employees that you have invested time developing their talents.**

When the training of your employees has begun and you are happy with the outcome of the development process, you will start to see the benefits to your company. Your employees will start to feel comfortable in their role, they will become dedicated employees and you can foresee keeping your experienced talented employees working within your company. This can be a win-win situation especially with employees 45+ who may not want to change jobs. So, they have more job satisfaction while you have highly skilled employees, within a progressive company all enjoying job stability. Another measure you can apply is asking employees to share in the cost of their development. While this can be especially appealing to younger employees looking to upgrade their skill set, it can also be of interest for the older workers, giving them a chance to change to another position more desirable in or suited for their current situation in life.

As mentioned before, your employees are your main asset as they are your company's main revenue generator. They bring in new ideas, produce or sell your goods and relate to the customers. Naturally, the confidence they have when they are well equipped to do their job offers a professional representation of the company. However, this is not only true for the staff but also for the customers. They will spend more when they feel they are dealing with professionals. An older employee with experience on the job and in life as well as up-to-date knowledge about the product is the perfect match here. So, putting more seasoned employees in the position as first contact for customers or training colleagues is an excellent use of an employee's talents. At the same time, it offers them a new challenge, again keeping them motivated.

## **6. Making your talent management work in practice**

To make use of your talent management system and put them into practice, there are three examples of practice to follow, according to a McKinsey study: 'rapid allocation of talent, HR's involvement in employee experience, and a strategically minded HR team' (McKinsey, 2018). All these measures can be linked to an effective development strategy in your talent management approach. Firstly, know about the talents needed and available in your company and record them. Write a profile for each role specifying the skills and knowledge it requires. You can ask the staff to support you as they know best what they do on a daily basis. Then document the skills your staff possess. Whenever a new position opens or a new role needs to be filled you already know what you need and what you have, making your reactions faster. A quickly allocated talent saves effort and most importantly money as the disruption time is short. Having such a visible collection of talents also functions as a conversation starter with your employees. On this basis you can discuss career options, development and training plans with all relevant parties in your business. You have a clear roadmap for all.

To be efficient, the HR personnel needs to also be informed about the employees' feelings and satisfaction levels. If these can be considered when filling the next position, you will notice a rise in motivation, leading to a better work environment. If you additionally manage to include these role changes into a positive employee life cycle, you are taking yet another step in the right direction. The employee life cycle is the whole time the employee spends in the company from recruiting to offboarding. If this experience is positive, it leads to a workforce 1.3 times more likely to outperform according to McKinsey. While of course your HR practices are not the only positive outcome on this approach, a well-thought and strategically planned talent management system supports this. This is also visible to your staff where both parties have a positive understanding.



This will tie in with the overall strategy for the company, giving you the whole package. As a business manager you should be involved in this process. When you know what the knowledge and competencies of the individual people in your company are, it will help you make educated decisions faster. To be always up to date, review the talent documentation regularly, at best every quarter.

## 7. Where to start

While it is important to keep all employees' talents in mind, on an ongoing practice and because of organisational needs, there is no need to develop all at the same time. Focus on the critical roles first. If you are going to miss a customer relations person in a couple of months, check your talent chart and see who might be able to take on this role. Then take all necessary development steps with this particular employee together.

If no role is going to be open in the foreseeable future, you can also start with the high performers and high potentials. Nevertheless, analyse and record the talents of all employees as this might surface talents you were not aware of before, turning these employees into high performers under different circumstances or in different roles. Therefore, it is always necessary to offer all employees a road to development within their own potential and the company's needs and possibilities. These measures may not require a lot of planning. Simply providing an opportunity for networking, to exchange ideas and broaden the horizon can be beneficial for these roles.

Another measure you can implement is setting up your staff in cross-functional teams. If the tasks allow this, staff members from different departments can work on projects together, combining their known talents for the greater benefit. This is also true for cross-generational teams, where the older employees share experience and best practices while the younger colleagues can support with understanding technology, innovations, digital tools, etc.. Again, the basis for all this is a clear understanding of the talents available in your company.

Whatever you do, involve your employees. A study by the employee engagement platform TinyPulse recently found that 76% of employees want to grow in their professional life. Having an efficient talent management system in place, demonstrates your willingness to provide these opportunities for them. This essentially gives them the chance to develop within your company instead of looking for opportunities outside. You keep better qualified employees while at the same time winning new ones through this system. It is valuable for all talents but especially for employees over 45+ who will most likely want to progress within the company. Through your talent management you can make this change for all.

## Development Checklist

- ☐ determine results for the future
- ☐ write a profile for every role specifying the skills and knowledge it requires
- ☐ record status quo of your talent pool
- ☐ match profiles with talent pool and record gaps
- ☐ estimate development needs using structured questionnaire and define process
- ☐ start with critical roles, then expand offers to entire staff
- ☐ involve staff and explain the company's strategy
- ☐ know about employees' feelings and satisfaction levels
- ☐ plan for assessable timespan with no major changes
- ☐ plan constant re-and upskilling and regular monitoring for educated decisions at any time
- ☐ introduce general training for certain groups
- ☐ be prepared for (digital) disruptions
- ☐ find agreement with employees to stay after training



### How others do it: The case of Netflix

Originally founded to lend DVDs via mail, the company later moved to paid online streaming, adopting new business models and requiring new skills from their employees. To be able to achieve this, they developed a set of HR practices that differ obviously from what many competitors do, but that proved to be successful for them.

And while Netflix is now a global business, some practices can also be taken and adapted to smaller companies.

One such thing is the requirement to employ only people best equipped for their role. When you have a so-called “A player” only in your team, the entire work is done more efficiently, and people are not busy correcting their colleagues' mistakes. It is therefore essential to place the right people in the right positions with the right skillset.

Another aspect is the expectancy to work only with adults. In Netflix's case this means handing over the responsibility for vacation time and organisation of travel entirely to the employees without any formal policy. They are only asked to act in the best interest of the company. This can be applied to development in the sense of skills improvements and personal involvement as well. When employees feel like they are giving responsibility and decision-making ability for their own doing, they will do what is best for their performance and – if they are in the right role – for the company's performance as well.

Additionally, Netflix has eliminated formal reviews. Since they were too formal and not often beneficial, they did not offer enough information about the performance of the individual employee. Instead, a regular conversation about performance was incorporated in the day-to-day interference between manager and employee. This way the measurement was more organic and also included 360-degree feedback from colleagues. It also eliminates the need for “Performance Improvement Plans” when the employee does not match the company's expectations as the development and thus a continued performance is planned ahead of time. This saves resources and stress and ensures you are still working with the “A player” in all positions. Including the colleagues – as in Netflix's case asking them what their co-workers should stop, start or continue to do – ensures the information from the base is also heard and incorporated to make the team work together still better.

Lastly, HR at Netflix sees it to be the manager's job to create a great team, at the outset a former HR manager asks others to think about a documentary of where the companies' successes will be in six months. The manager will recall the particulars and specific results. A focus is on the differences that exist now, and then looking back at the skills that are needed to achieve this. Only then are they asked to imagine what talents are needed to do these jobs. This is like our approach to define the future goals first, then the profile for the needed workers and then the talent pool in the company. When you know what you really need, it is easier to match the employees.

How to deal with the potential mismatch surfacing then, is also the topic of an episode of the podcast “We're Only Human” about talent mobility (available here: <https://upstarthr.com/talent-mobility-case-studies-and-research-podcast/>).

## UNIT 2: DELEGATING RESPONSIBILITY

A company works best when the talents of its staff are matched with the roles and its requirements, as the previous unit has shown. When analysing the status quo and designing a roadmap for development, your company might be faced with many development tasks and areas for improvement. However, this does not all have to be administered by you as a manager or your HR staff. Some tasks can be delegated to your employees, making them an essential stakeholder in your development process.

### **Use your development plan as strategy**

Applying the analytics of talent management, a company can forecast how many people they have employed, with which kind of skills and competencies these employees have, and what talents they will need in the future. In this way they can minimise skill gaps and make the recruitment process more effective. This is especially valid when older employees are leaving the company on a set date due to retirement. Nevertheless, this can also be beneficial before that when said staff members need to change roles due to their professional and personal circumstances, physical ability or just because they wish to make changes in their career. When you have a strategy for talent development and allocation, you can cater to some of these wishes, maintaining or even bettering these talents and preserving their knowledge for your company. Doing this, you ensure that the next generation takes in the wisdom of the parting one while the employees 45+ stay motivated and part of the company and also its culture until it is their turn to retire.

Establishing this system and including the employees themselves has further advantages for your talent management and thus the processes in your company. Instead of just knowing when you need a developed or a new staff member, you can actually grow your company through growing your talents. These engaged employees then lead to higher satisfaction and motivation rates, less absenteeism and less resignments and even more innovation and productivity, as research indicates.

### **Benefits for the company and your account**

Furthermore, you support and strengthen relationships within the team and make the whole system more inclusive. Taking this into account, distributing responsibility for the talent management to your employees does not only make you more successful in the HR area but also in terms of company culture through interrelations within the entire company.

While making the system work together for the benefit of HR and company culture is great, it also saves you money. When you understand the costs of development and the benefits of a trained workforce, you know where you have potential for growth, where an investment is advisable and where your still untouched talent pools lie. Managing and developing talents is therefore also a question of money.





An interesting practice by the large consultancy Deloitte shows how the integration of employees can even continue after they decide to leave. The firm keeps qualified ex-employees informed about the developments in the company and invests money to keep their contact details current. In case they want to return, they are already well informed and can start right away. This does not only ensure a good circle of brand advocates, but it also enlarges the talent pool and development options with little effort. From the SME context this can be applied to former employees and older employees who wish to leave the company. Keeping close ties and a constant flow of information about new developments enables those staff members to switch to new roles such as advisors, mentors' consultants etc. after they discontinue their initial job. In this way they are already taking responsibility for their colleagues while still in their current role and afterwards with a great inside knowledge of the processes.

### **Involve the employees and share responsibility**

Involving the employees is not only a good idea when determining the available talents but also when distributing people to certain roles. They are mostly aware of their own skills and often have decided on their own development options. If the latter is not the case, presenting potential new roles to them can cause them to rethink their potential and ways to reach it. They may even come up with ideas on how to match the requirements for that position. The consultancy McKinsey prompts this by posting new job openings or roles online. Interested employees can then indicate their preference which is matched with the ranking made by the person responsible for the project or department. A senior manager decides, balancing the interests of all and picking the option that works best in terms of developing the talents needed. This practice can also be cultivated for SMEs, where new roles can be posted to the notice board in the breakroom, shared on social media or emailed to all employees. They can then decide, if they see themselves fit for the role and what development they might need to be a perfect match. This can then be compared with the general skills roadmap and the analysis of available and needed talents. If you have created a record of the relevant skills in which to refer to. You as the manager can then match these two and decide who is the best fit for the new opening. Keeping the recruitment process internal this way also saves money and time required for outside hiring.

Additionally, passing some of the responsibility to the respective employees ensures they identify with the new role and invest what is needed to prove the trust put in them. If the process is done successfully, you will develop the individual employee's talent and thus benefit the entire company. Developing talent does not necessarily have to mean large investments but just listening to each other's needs and deploying the right people to the right position

Besides the higher satisfaction rate, this process will also further add to your allocation process. When you place the right people in the new position quickly, you save time and gain an advantage compared to your competitors. Production will not halt longer than needed – possibly not at all. A study by McKinsey underlined this with numbers, stating that companies are '7.4 times more likely to report rapid talent allocation when their organisations effectively assign talent to a given role based on the skills needed' (McKinsey, 2018). So, know what talent you need, who has it and how to match them efficiently.

## Specific measures to start your development process

When putting these plans into specific measures, you do not need to invest a lot of money in the process. There are actions you can perform that cost little investment, but it takes time for the recognition and succession planning. Additional measures that mostly need the involvement of other colleagues are job rotation and on the job training. With gradual investment you can also offer e-learning programmes, work-related tutorials and educational courses.

It is up to you to decide which action is best for your company and your team when looking at the recordings of available and needed talent. To help you form an opinion the different measures will be presented more in detail in the following.

These include:

1. Job rotation
2. Job enlargement and Job enrichment
3. On the job training/Mentoring
4. E-learning programmes
5. Work-related tutorials
6. (Educational) courses
7. Cross-departmental collaboration and job shadowing

### 1. Job rotation

Instead of working in the same position for the entire employee's life cycle, qualified staff members can move jobs within the company to get insights into other departments and teams and explore alternative career paths. It is thus characterised as a systematic movement from one job to another while staying in the same company. While it might be implemented in a bigger, more formal style in big enterprises, it is also of interest for SMEs when connected with specific time bound assignments as it gives employees the chance to understand other departments or teams and interact with the company on all levels, increase product quality and avoid stagnation and boredom. However, if not well prepared and executed, this measure also bears the risks of increased workload and thus decreased productivity for the respective employee. Additionally, the disruption of work for some time and reluctance on the superior's level need to be considered. If a complete job rotation seems too much, cross-training is an alternative. In this measure employees take on duties that surpass their normal job description. The duration of this action can be anything from an ad hoc fix to an ongoing, planned process. After completion the respective employee is not automatically moved to a new position, but it shows their willingness and determination to learn new skills, broaden their horizon and advance. You should record these new skills in the talent assessment of the staff member, which forms the basis for the selection of suitable cross-training candidates.

### 2. Job enlargement and Job enrichment

Instead of moving the employee to a new role, you can also change part of the job they already do. This can be done through job enlargement – adding tasks and duties thus expanding the scope of the job – or through job enrichment – putting more depth into it by granting more control, responsibility and discretion. These two processes should be combined to ensure a rise in motivation. To do so it is important to distinguish between the two processes, at best with the help of the employee to understand how they feel about the changes.

### 3. On the job training/Mentoring

Also referred to as 'stretch assignments', staff members learn quickly while actually working. At the same time, they have the chance to independently develop new skills, knowledge and competencies and gain experience enabling them to perform their current job better and eventually take on higher-level roles. The decision about the most fitting rotation is up to you as a manager and depends on the long-term plans for each employee and their needs. Research shows that cross-functional experience is best for first-level leaders, mid-level leaders could experience tough challenges, and new executive leaders need high-risk and high-visibility experiences. To be successful the measure requires some time investment and enough human resources for guidance. Instead of placing an employee entirely into a (new) team for learning on the job, you can also pair them with an experienced colleague as a mentor. Match them based on their skills and development needs. No matter if done formally or informally, it needs a clear outline, to track goals and monitoring. Using this relationship that often surpasses the professional ties, the turnover can be reduced, the recruitment enhanced and the productivity and the company culture benefit. This is especially true when the mentee comes from a less advantaged group. But also, the mentor benefits from the programme, sharing their experience and thus developing leadership and communication skills.

### 4. E-learning programmes

Even before the pandemic and the disruptive work environment that brought; the general need and desire for online learning has been a desired way of developing oneself and employees. Matters that were generally taught in a classroom setting to a wide range of staff members could be taught at the learner's own demand and pace and in their own time via digital learning platforms. E-learning can be achieved through online videos, tests, courses, and games. This is especially valid for skills that are not company-specific but of general interest to the workforce. However, to ensure engagement, you need to deliver content in small, easily digestible pieces with a clear connection to the actual work and its improvement. This is especially true when consumed on a mobile device. Implementing such training is generally easier especially when the audience is bigger or remote. As with all other measures presented here it is also important to tie this in with the overall strategy you have designed for your company.

### 5. Work-related tutorials

When only short training interventions are desired, take a look at work-related tutorials. These can be included from the very beginning of the employee life cycle all throughout their career to build a critical information base and demonstrate best practice. These can be included in a training plan to structure the development. Individual tutorials can be made up of video lessons and virtual simulations to introduce new knowledge and develop skills. "Psychology Today" supported this structure by saying the human brain can deal with and absorb video information up to 60,000 times faster than text. To do so however, the individual tutorials should not be longer than two minutes and get straight to the point. If you fear they will not be consumed intensely enough, you can combine them with other development actions which also increases retention.



## 6. (Educational) courses

The traditional classroom experience still offers valuable development options. When applying it in your company, emphasise soft skills which are useful for all employees and prepare them for the changing labour market. As most staff members work in teams – physically or remotely – they can use the courses to acquire skills in collaboration and communication. When you want to focus more on the educational, business-related contents, you can create a corporate learning classroom which offers job-related skills and company-specific confidential knowledge. Having a facilitator or trainer present allows for specific questions and more complex topics to be addressed. What can be learned here is of value for the whole company, not just the individual employee. It is also easier to align with the overall development strategy and goals while it demonstrates the willingness to provide development options. However, it can be more expensive and time-consuming than other methods.

## 7. Cross-departmental collaboration and job shadowing

Developing as an employee does not have to be limited to skill training in their own role or department. Collaborating across departments – also called social learning - supports empathy, cultural understanding and gives a better grasp of the entire company structure. Colleagues learn from each other instead of having to consult with management. However, it is not obligatory for most employees to work together and connect with other sections, so structural guidance is necessary. Define which teams you want to collaborate such as marketing and sales and make it a point for them to meet regularly. In a more regulated way, you can also introduce job shadowing, where a specific employee follows the processes of another department. Through peer-to-peer learning, teamwork and collaboration is enhanced. Employees' gain a different perspective this way and learn directly what difficulties their colleagues face. Being part of another department for some time, they understand what influence their actions have on others. Again, it is important that you structure this process and hand-pick the departments and employees.

These different measures all highlight the options and advantages that lie in delegating responsibilities to employees. While making the company more efficient or possibly establishing new, smoother processes, it can also support the development of the employees, making use of previously unused talent while closing skills gaps. Additionally, it can help the individual employee and thus the company grow.



## UNIT 3: CAREER MANAGEMENT AND PROGRESSION

To use the talent management successfully for career management and progression the goals of the company and the plans and aspirations of each individual employee have to be aligned. As a manager you need to know what you have planned for your business for the next few years or the next 12 months at least. Afterwards you need to consult with each individual employee to find out what their plans are, which talents they offer and where they want to develop. These two results then need to be matched to facilitate a way for development. This has to be an ongoing process, monitored at set times, to include all present and future talents. Balancing both sides is key.

Implementing this into the overall business strategy is therefore essential. Talent creates value for your company and has to be supported and developed whenever possible and fitting for the business. Goals in developing the individual talent must align with the goals of developing the company.

### Striving through talent management

If used successfully, the business will strive through talent management, as it is in its core 'anticipating the need for human capital and then setting out a plan to meet it' (Cappelli, 2008, p. 1). Meeting the demand with your own people helps you save money as recruitment processes are less necessary and the ties and connections to the business are already there.

### Collaboration as a basic key to success

There are many templates available online and through private consultants that try to make collaboration easy. Some promise you that you must answer a few questions and then you are ready to start. It is, unfortunately, not that simple. For you to be able to match the right talent to the right position, to understand their skills and potential gaps and to discover hidden talents, you have to make time with the employee. Sit down and talk with them, understand their aspirations and personal circumstances. Ask about the talents available on the employees side, even the currently unused ones. Which do they want to bring into the company? Give them support in realising their talents, hinting at personal experiences and hobbies as much as you know them and see fit. Explain the role profiles the company has, inquiring about talents needed to fill them. Ask them specifically, do their aspirations match the competencies defined by the company for the role/department/company. It is also helpful to look ahead together, in terms of what the employee sees themselves doing in five years from now. Where do they see themselves in the working world in the future? The tasks described then give a good hint at the talents available and wanting to be used. Essentially, it is about fitting the template to the situation instead of vice versa. Of course, guiding questions are helpful and ensure that all talks are somewhat similar and thus comparable, but it is about personal interaction and agreement, individual steps for the individual employee rather than a one-size-fits-all. So, modify the questions when needed to fit the individual employee and get as personal as feels comfortable. At a later stage these individual results have to be combined and aligned with the overall business strategy before any decisions are made. However, the basis is to talk to each other.

Below are some tips and hints on how to approach these conversations:

DO	DON'T
<ul style="list-style-type: none"> <li>• Take your time and let the employee feel involved.</li> <li>• Create a comfortable atmosphere for the talk, trying to understand their aspirations and personal circumstances</li> <li>• Structure all talks in a comparable way as much as possible</li> <li>• Ask about the talents available on the employees side, also the currently unused ones</li> <li>• Give them support in realising their talents, hinting at personal experiences and hobbies as much as you know them and see fit</li> <li>• Talk about the dream work in the future</li> </ul>	<ul style="list-style-type: none"> <li>• Use a template from books, online or consultancies without personalising it</li> <li>• Expect a one-size-fits-all plan</li> <li>• Come unprepared without profiles for all positions</li> <li>• Rush them to answers, offering personal information takes time</li> <li>• Waste time on talents not related to the company</li> <li>• Belittle or laugh about any talents mentioned</li> </ul>

### Talent management as supply chain

Understanding the talent needs in the overall company development can be compared to operations and supply chain management. Through analysis and the execution of certain steps you can prepare for and adjust to today's realities and plan ahead for the future. Developing a talent in a cost and time effective manner is comparable to finding the cheapest and fastest way to create a product. While sometimes outsourcing – hiring outside – is needed to gain quick results, the general supply chain comes from within the company. When going through the development process and gaining experiences, obstacles are remarkably similar to how products move through a supply chain: reducing bottlenecks that block advancement, speeding up processing time, improving forecasts to avoid mismatches' (Cappelli, 2008, p. 3). Just like supply chains, employee development gets better with better planning.

Besides, risks need to be managed. Again, the supply chain is helpful here. The decision between recruitment and development as well as the reduction of risks in the needs forecast belong to the demand side. The return of investment for development processes and ensuring the newly developed employees stay in the company returning this investment can be counted to the supply side.

### Monitoring and check-ups

When creating a personal development plan with the individual employee, the work is not entirely finished once the plan has been documented. You need to monitor the process as updates may always be necessary. Throughout the year you should review the agreements and executed developments again with the employee and check in with them if their aspirations have changed. It is necessary to do this on a regular basis. It is advisable to plan for employee development at the same time as you plan your company strategy to ensure that they are aligned.



## Consider all employees

When starting with the development plans it is important to have all employees in mind and create an opportunity to appreciate their thoughts and ideas. One way to do this is to include the creation of a personal development plan as an outcome of your performance appraisal process. This ensures that all employees are considered from a talent management and talent development perspective. Ensure that you consider the generation and department the employee comes from. While the younger generation might be looking more for technical development, the older generation may want personal development. However, this is not always the case. Especially for the older generations 45+ years, it is important that you hear them out and understand all they are capable of and how this can be included best in the company goals, also taking their personal circumstances into account. The question of work-life-balance may seem more obvious for them, but it is in fact essential for all employees to consider.

Clarifying the expectations on both sides is essential in agreeing on a common starting point. Naturally, you will only support development that ensures the potential skill gaps you have identified are filled. Nevertheless, give the employee a chance to explain their talents and how and where they see themselves in the company in the future. This can introduce new strategies or solutions you have not thought about before. Your employees will most likely have unused or untapped talents. After discussing the options, the goal of this conversation is to formulate a formal development plan with binding steps - it is the pathway to further development - important for both sides. When leaving the room, both you as the manager and the employee should know what will be done with which goal. These can include measures like leadership development, technical training, team building measures, secondments, project work or any of the specific measures from the unit above. The variety is great; however, all should have in common that they are aimed at the future and a betterment for the company.

## Start small

You can start the development process with a small group. Develop those who need the most help first, always giving the others a perspective and at best a timeline, so they know when it is their turn. Through working with smaller groups one at a time, you can monitor the processes better and see what works well. Additionally, you can update the forecast often and this way, base all following development measures on a more precise estimation. This is not only good for the group itself but for all other colleagues as well, getting better development opportunities that fit the company. If the measures do not work perfectly you can also go back and redo the personal development plan with this small group instead of having to redo them for all employees. You can build the plans that are tailored to each other.

Once you know what development steps you want to take with the individual employee, you can turn big changes into small steps, each with a specific timeline and a due date. Building the packages on each other and evaluating the forecast in between gives you yet another chance for shorter, more precise forecasts. A structured development plan for the employees gives you the chance to set the dates for monitoring visits right away and to package the entire development into small, doable tasks with checkpoints.

### Share the costs

When the evaluation calls for more intense training that requires outside support and investments, you can ask the employee to share in the costs. This is a fairly new approach, but since they can use what they learn with you on the open market, it is also an investment into their personal knowledge and experience. However, if they are not willing to pay for any training, you can also inquire if they are willing to do (some of) it in their free time. This way you save working hours, and your regular business does not stagnate. If doing so, ensure you offer a training package that can compete with those available on the open market that the employees might pick out themselves. Additionally, it is also advisable to let them voice their opinion in selecting the training programme when sharing the cost.

Having a written-down talent management process with a development plan for each employee is also a great feature when communicating the need for development measures to external stakeholders. They can then see and understand at a glance what you plan to do, why, and how it will affect the company in the future. Research supports this estimation by saying that companies with effective talent management have high abilities to attract and retain talent and thus to outperform. They are 'six times more likely than those with very ineffective talent management to report higher TRS [total returns to shareholders] than competitors' (McKinsey, 2018). This cumulation shows that talent management can support you on various levels in achieving your business goals.

### Supporting the company culture

Using your development plans to ensure the right talent is matched with the right position is almost obvious at this point. When knowing which talent is available and which is required, you know who is the right person for now and in the future. However, there are also other circumstances in which such planning can support the company's development. It also helps to align your staff with the company culture. When further training and development are part of everyday business life, it shows your staff that their competences and also their satisfaction level is important to you as a manager and the company as a whole. You can also work towards your desired company culture by presenting content and development options that support it. All this has to fit in with the employee's aspirations to be authentic.

### Keep the conversation going

Although you may only have time to re-evaluate the personal development plan of each employee annually, you can use the plan to start the conversation more often. When a due date or checkpoint arrives, you should meet with the respective employee for a feedback session to see what has worked so far and where potential for an even better performance is. Do not forget to inquire how they are feeling with this development and if there is anything you can support them with. When you see the need or want to make it part of your company culture to include the needs of the employees more, you can also start more casual discussions about the development every other month or once a quarter. This gives you a chance to ensure your investment is paying off and gives the employee a feeling of recognition and value.

Another aspect that is important for the employee is the fact that the personal development plan shows each and every one of the career options within the company and a pathway to get there. Knowing the potential roles that can be open to them if they develop according to plan ensures motivation and high satisfaction levels and thus productivity. Just knowing there is more to come, and they have a way of getting there can work against a drop in productivity through disengaged or even staff who want to leave. As most employees are looking to advance, they will see this as a





boost and refrain from seeking challenges elsewhere. Even if no such role is open yet, they know they are preparing for something bigger, and you know they are capable of taking on that role when it is available. The rapid talent allocation that this allows for will save you money in the future if your planning is correct. Identifying with the business and its future is especially relevant in SMEs with a smaller workforce and more internal mobility and will ensure your skilled workers stay with you for the long run. Especially the older generation of 45+ employees can thus see a path they can continue on in your company, passing on their knowledge and skills to their colleagues.

### Preparation for unexpected circumstances

Lastly, all the well-planned steps don't always work when unexpected circumstances arise. Something you cannot plan for cannot be covered by the development plan. However, if you know what your staff are capable of, you can react quicker than your competitors. You know sooner who to put in charge of solving the arising problem and which development potential you can set loose to get back on track. In disruptive times your company's continued improvement and ability to react to changing requirements becomes paramount.

Taking all this into account, having a development plan is a great advantage compared to your competitors. When taking the steps, it calls for you to have a direction in which you can go to identify gaps, overcome them, and develop your entire company for the better, preparing it for the future.

Developing your employees means developing your company. You as a manager as well as each employee knows where the journey leads to, which steps are necessary to get there and how this all ties in with the company's strategy and goals.

Writing personal development plans offers great potential to outperform – as a business as well as your own goals. Know your people, work with them, provide them with opportunities and they will return it – with more productivity, a better company culture and an overall successful company.

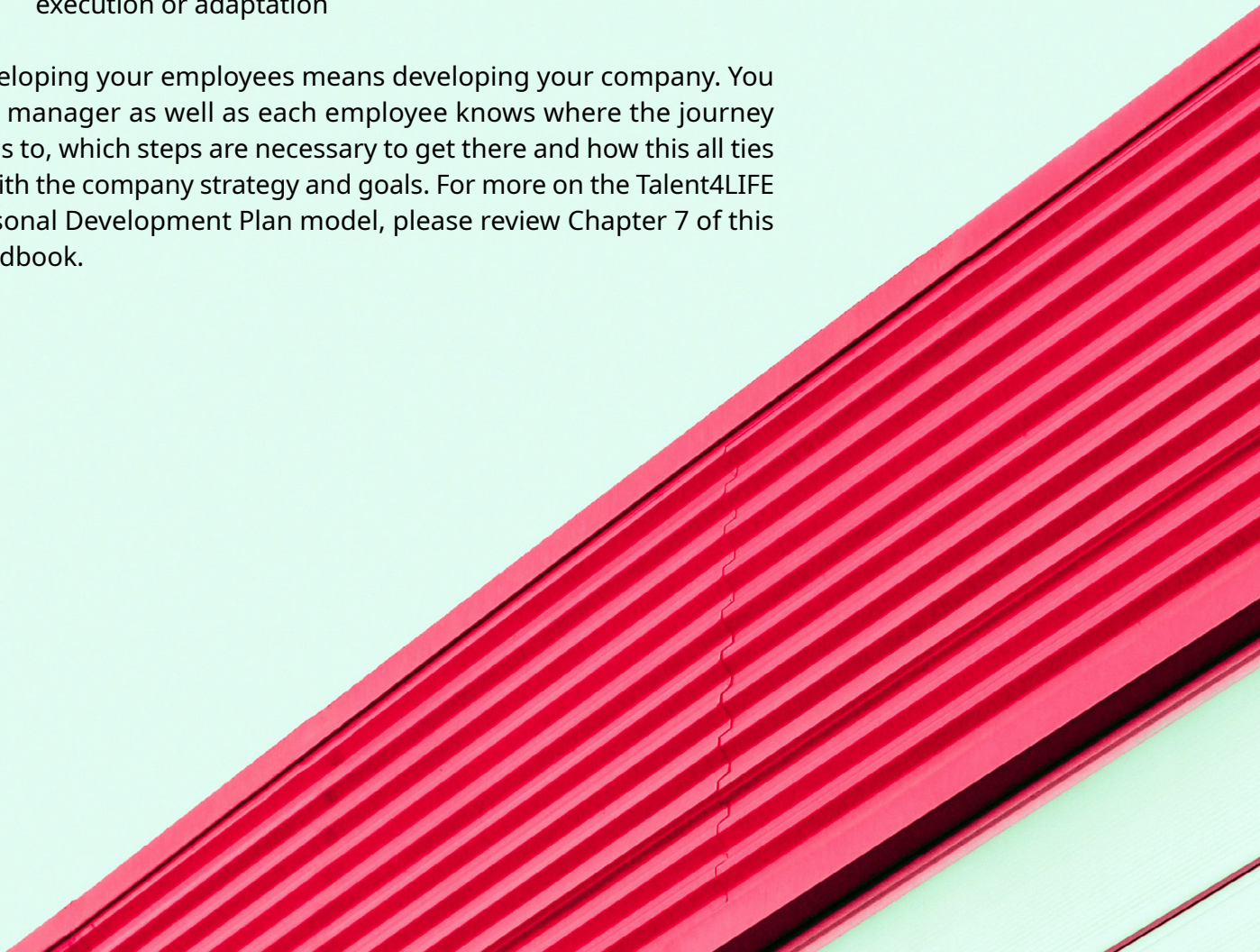


## Structure of a Personal Development Plan

All the previous steps and information can be put into action and be achieved through the performance of the following six steps:

- **Step 1:** Review the Talent4LIFE Personal Development Evaluation (Chapter 7)
  - Answer questions concerning the perceived talents and skills of each employee from the employer's and the employee's perspective
- **Step 2:** Core Talents for further development steps
  - Find and define available and needed talents and agree on developing them through a guided interview
- **Step 3:** Megatrends demographic development & digitalisation
  - Learn about them and their influence and define measures to address them, opening areas for developments and further defining the use of the talents
- **Step 4:** Work-life-balance
  - Measure the work life balance of each employee and find ways to address it short-, middle- and long-term
- **Step 5:** Steps to reach agreed developments
  - Define the actual steps to reach the development using the SMART method for the next one to three years
- **Step 6:** Milestones, common monitoring points and due dates
  - Set milestones and realistic due dates and common monitoring points to rate the development and ensure its execution or adaptation

Developing your employees means developing your company. You as a manager as well as each employee knows where the journey leads to, which steps are necessary to get there and how this all ties in with the company strategy and goals. For more on the Talent4LIFE Personal Development Plan model, please review Chapter 7 of this Handbook.



# CHAPTER 4:

## growing your talent

*“Train people well enough so they can leave,  
treat them well enough so they don’t want to.”*

**- Richard Branson**



# INTRODUCTION

Growing talent is vital to the success of companies and SMEs. As a business owner, if you want to support your best employees to grow, you need to understand the gaps that exist within your company. It is important to recognise that talent means different things to different people, and the support you provide needs to nurture a culture of purpose and belonging. This is especially important for employees aged 45+ years. Encouraging employees to take initiative and step into new roles will reinforce the notion that your company cares about their growth and values the contribution they can make to the company. When employees believe their skills, perspectives and work are valued, they are more likely to remain engaged and loyal to their companies.

In a recent Harvard Business Review article, Build an A-Team author Whitney Johnson refers to this as a *learning ecosystem*:

“High-growth individuals who embrace new learning make the companies smarter and contribute to its growth, but they can’t do it alone. They need their managers to have a reciprocal interest in individual growth and to create a learning ecosystem to foster it.

“Like a biological ecosystem, companies are either growing or they’re dying. And companies grow when their employees are learning. So, if you want a high-growth company, you need to create a learning ecosystem to support high-growth individuals — to expose them to new and challenging opportunities before their roles become stale.”

In this chapter we explore how employee learning and development offers employees the opportunity to develop their capabilities to better perform in their present and future roles. This increases productivity, motivation, and employee performance. Encouraging your staff to grow works to help employees improve or acquire the skills or knowledge that they need to be more effective in their job. In some cases, it may also lead to change of role or promotion. Opportunities for employee growth can help employees make better decisions, become adept at problem-solving and learn to take more initiative. The promotion of talent management among employees has led to a change in mentality within companies. In today’s world, personalised, continuous learning and development has become the norm.

Training is a key asset in a company's culture. The current speed of change and evolution of markets can be a big challenge for SMEs. What works today may become obsolete tomorrow. Therefore, establishing continuous training processes helps the workforce to stay up to date and adapt quickly to new developments. As talent management is about taking a strategic approach to attracting, retaining, and developing a workforce, a company must encourage employees to grow. By enabling staff to learn new skills and take on more responsibility, staff will feel empowered and develop a willingness to stay with the company longer term.





# UNIT 1: EMPLOYEE ENGAGEMENT AND EMPOWERMENT

The importance of employee training is also intricately linked to motivation. To boost talent management, you must reinforce that your employees are doing their jobs well and that you value their efforts. Internal training programmes have become a necessity and by offering incentives linked to growth targets, you can motivate employees to want to grow. A company that invests in its employees is not only better valued by its employees but also by external professionals. The same principle applies to career plans. If an employee has a personalised development plan linked to eventually assuming greater responsibilities, they will be motivated to continue learning new skills. Ideally the personal development plan should be linked to an internal promotion plan in the company that determines when it is the right time and what objectives an employee has to achieve in order to be promoted within the company. By combining training, career plans and the promotion plan, the employee can foresee a clear path for success for them within the company and how they can get there.

A simple method of employee development is the basic training that many people receive when they start working for a company. Many prefer to work in a position where they feel they are professionally trained and prepared to complete the tasks that are necessary in their role. Once initial training is complete, employee growth can continue through ongoing training. This often helps employees gain the skills and knowledge they may need for promotion within a company. Such training may involve employees shadowing other associates and managers or receiving ongoing instruction within their position.

## What purpose does it serve?

Employees who are engaged and emotionally connected to their company have been shown to perform better at their jobs. Companies that apply a culture of work well-being, safety and human connection have a more committed and empowered team, which generates better work performance. Empowerment for health can be a social, cultural, psychological, or political process through which individuals and social groups are able to express their needs, raise their concerns, design strategies for participation in decision-making and conduct actions political, social, and cultural to meet their needs. Through this process, people perceive a closer relationship between their goals and the way to achieve them and a correspondence between their efforts and the results they obtain. If companies give too much priority to their results instead of their staff, you can end up with a stressed, uncommitted work team, which has a negative impact on results.

## What factors affect employee growth?

There are many different factors that can lead to employee demotivation and disengagement. To ensure that you can keep employees motivated and on a path to growth, it is therefore important to consider the following factors that can impact an employee's commitment to your Company:

- Stress and psychological health: the biggest problem that affects a growing number of people and continues to grow.
- Personal issues: work-family balance, debt, relationships, substance abuse.
- Business issues: roles in the workplace, work relationships, trust, and uncertainty.
- Decreased physical health: chronic diseases, serious illness diagnoses, sedentary lifestyle, or poor diet.

Many of these factors are external, but they can be supported by your Company to ensure employee engagement and growth can be a success.

## What leads to employee engagement & empowerment?

Employee empowerment is key to employee engagement. When your employees feel empowered, they are more motivated to push towards success since they have a larger stake in your Company. There are key drivers that lead to employee engagement and empowerment. Often managers play a pivotal role with this approach. As a manager, you can act as an agent of change and act to empower and engage your staff. This can be achieved through the 3 E's:

### 1. Employee Engagement:

The extent to which employees feel enthusiastic about their jobs

### 2. Employee Enablement:

The practice of giving employees what they need to do their job to the best of their ability

### 3. Employee Empowerment:

Providing employees with a certain degree of autonomy and control in their role

Engagement, enablement, and empowerment can be affected by discrimination, stereotypes and biases that prevail in the workplace. This can be evident among older workers as misconceptions exist about the attributes they bring to the workplace. It is important to implement strategies that look to eliminate this type of prejudice, and work to engage, enable and empower workers of all ages. Studies have shown that stereotypes and perceptions of older workers commonly reported negative beliefs (Harris, et. al 2017). Today's older workers want to remain in the workplace longer, so it is important to breed a culture that confronts discrimination and outdated assumptions. This works to improve staff retention, project an age-diverse workplace, and promote employee wellbeing.

When addressing this issue in your workplace, it is important to show employees how they are valued within the company. This can lead to increased motivation, self-confidence, and enhanced performance. Challenging ageist discrimination, stereotypes and bias can encourage older workers to feel respected, appreciated, and relevant in their professional roles. It also shows younger workers that older workers also make a strong contribution to the Company and have something relevant and important to bring to the table.

As an SME business owner or HR professional, you can implement methodologies that work to promote employee engagement and empowerment. These can result in:

- Employee autonomy
- Employee participation in decision-making processes
- Increased knowledge base
- Desire to progress within the company and take on more responsibilities
- Improvement of HR processes

How can you achieve employee engagement and empowerment? This can be pursued through varying strategies.

1. Offer training and promotional opportunities
2. Watch for social cues in the workplace
3. Have an open dialogue with employees
4. Implement mentorship programmes
5. Remain vigilant and recognise stereotyping



Putting these practices into use enables you to promote a multi-generational and diverse workforce. This can drive innovation, build a healthy talent pipeline, and promote the sharing of best practices and different perspectives.

### 1. Offer training and promotional opportunities

Ensure that training and promotional opportunities are evident to your staff. These training programmes should include leadership, continuous professional development, sensitivity, etc. Offer ongoing coaching and educational opportunities that allow workers the ability to upskill regularly. Training opportunities can be offered in a variety of formats:

1. **Online training:** this is training that takes place through Internet platforms. Sometimes the courses are offered live or recorded, so that users can access the materials whenever and wherever they want. It is extremely popular because of the flexibility it offers and the number of resources and third-party platforms that exist on the Internet today.
2. **In-house training:** In this case, employees receive training in their own offices and in person. The company hires a company or an expert to come to the company to provide the training. The benefit of this type of training is that you control when the employee completes it and as it is typically trainer-led, the training may be more memorable than an online course.
3. **Collaborative training among colleagues:** this type of training consists of organising sessions given by the company's own employees who have specific knowledge in an area. The employee shares information, experiences, and practical advice that can help others in their roles. This type of training also helps to improve communication and the atmosphere between teams and empowers the employee giving the training.

### 2. Watch for social cues within the workplace

It is essential to watch for social cues in the workplace that can promote ageist attitudes. This can often appear in jest; however, it can encourage harmful perceptions about the ability of older workers.

### 3. Open the dialogue with employees

Create safe spaces where employees feel that they can be open and comfortable enough to share any concerns or suggestions. If you cultivate open lines of communication, you will promote respect discourse and help break down barriers and stereotypes, including ageism. Open dialogue can build trust, show commonality, and break generational boundaries that often exist in the workplace.



#### 4. Implement mentorship programmes

Mentorship programmes are a popular favourite in the bid to challenge discrimination in the workplace as they can bridge age-related tensions that employees often face. Programmes such as *reverse mentoring* work to break down intergenerational gaps and connect employees of different age groups. This is where a younger and older employee are paired and encouraged to share knowledge and skills. Older workers typically impart their knowledge and experience and in exchange, the younger workers support older colleagues with digital technologies.

Multigenerational workplaces tend to develop more inclusive and diverse cultures. By challenging ageist discrimination, you can build better connections between employees. This can have a direct influence on growth, staff retention, engagement, and innovation, which will help drive your business.

#### 5. Remain vigilant and recognise stereotyping

Making assumptions that older workers are biding their time to retire or are uninterested in learning new skills can set a precedent that puts them in a negative light. This can affect morale and productivity within the workplace, whilst also potentially neglecting invaluable skills that a more experienced head can bring to the party. It is always important to consider all interested candidates when advertising a role, but a diverse inclusive staff with older 45+ year olds will bring a wider set of global skills to your Company, leaving you ready to better face new challenges.

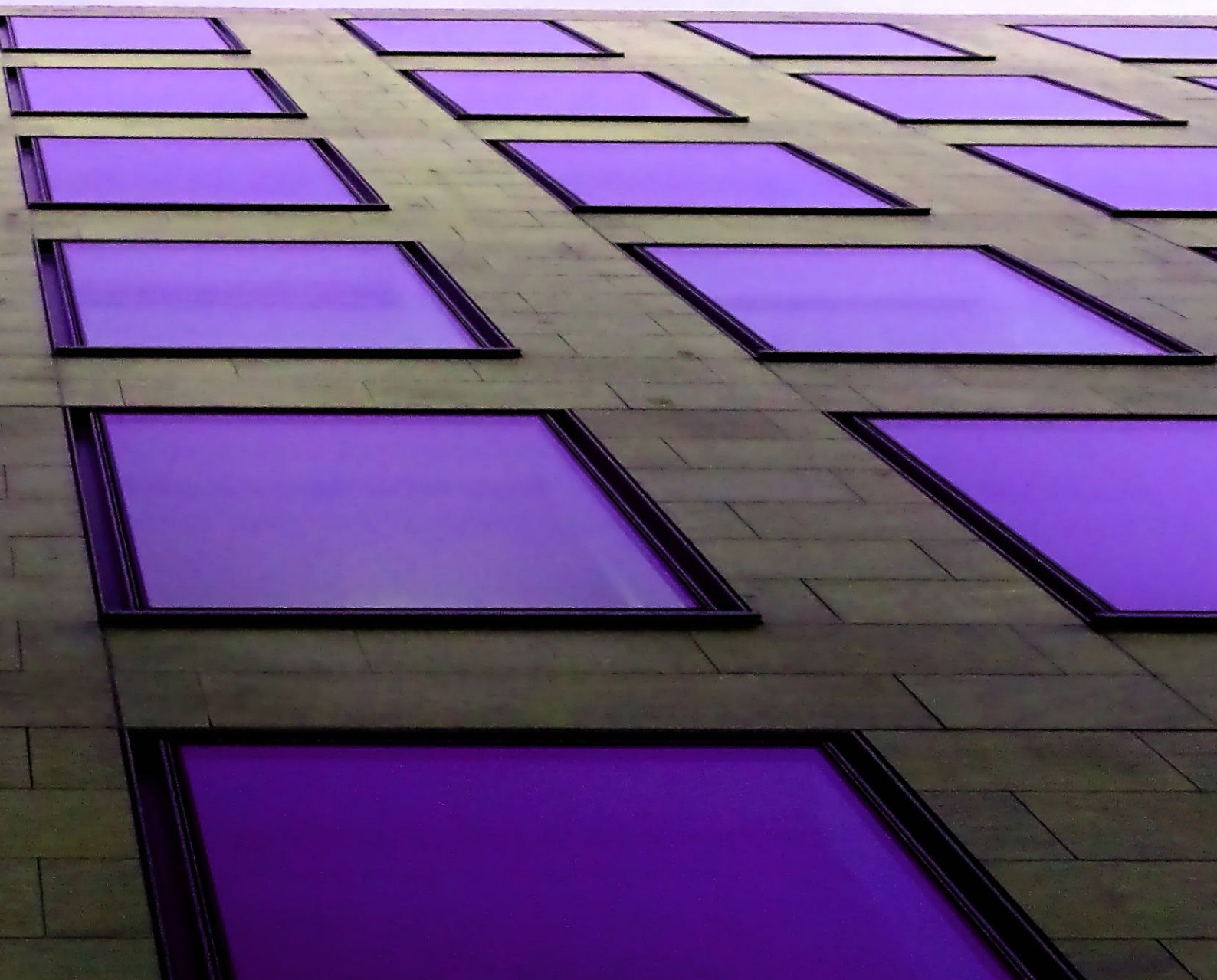




## UNIT 2: COACHING AND MENTORING TO GROW STAFF

Coaching and mentoring can help to strengthen your overall talent management strategy. Trying to build upon employees' existing skills while identifying new opportunities can support the talent management of workers aged 45+. This ensures that your employees and your company remain competitive in an ever-changing global market.

As discussed in the previous unit, taking a personal interest in employee career goals can result in increased staff retention and employee satisfaction. Help your employees to outline a career path within the company so that they can better visualise their future at the company. In doing so, you provide a better structure, support, and encouragement to your workforce. If you are concerned about skills gaps or employee retention rates that exist within your company, you might consider a revised talent management strategy which can address this issue. This also works to "future-proof" your company. Better preparing and supporting your workforce is the key to your talent management strategy. Through coaching and mentoring your employees can build the relevant skills and capabilities to reach their goals.



Coaching and mentoring to develop can fuel employee career growth. You can encourage your employees to pursue relevant business courses and workshops that look to further their career advancement. Help your employees to keep upskilling and ensure that their skills are relevant to your company and industry today. A mentoring programme can be an effective tool that focuses on employee growth. This can be beneficial for older workers as they can gain a fresh perspective on rising trends. It is also a wonderful way to increase the visibility of employees for future leadership opportunities. This 'two-way street' approach can offer deeper insights into intergenerational gaps that may exist amongst your staff. Taking a personal interest in employee career goals can result in increased staff retention and employee satisfaction. Help your employees to outline a career path within the company so that they can better visualise their future at the company. This leads to talent development growth within your company, which hosts many benefits to both you, your company, and your employees:





Supporting your employees to develop and grow can create a culture in which employees reach their goals, know they are valued, have a morale boost and better productivity rates. One of the most important tasks of a manager is to develop skills in your work team, which allow team members to have excellent job performance. As a leader, you should help members of your team establish goals that are achievable, are aligned with those of the company and that increase their motivation and personal success at a professional level.

### CASE STUDY – Mentorship for employee growth

#### Bill Gates

Warren Buffet acted as a senior mentor to Bill Gates – the successful tech-billionaire. After Bill Gates dropped out of Harvard as a teenager, he was unsure as to whether he would succeed in his professional life.

Bill Gates pursued a mentorship programme with Warren Buffet, who was 30 years his senior. With this experience, Buffet motivated Gates to overcome adversity and long-term thinking. This intergenerational mentorship allowed Gates to share his innovative ideas with Buffet, while Buffet could share his expertise in the industry. This led Gates to gain an insight into time management and task prioritisation. Warren Buffet's mentoring offered Gates an experience whereby complex concepts were put in a simple form, so that Gates could better perform in his role. This enabled Gates to fulfil his potential and successfully confront his 'high school dropout' tag.

Developing your work team is a strategic and particularly important task for your company since it contributes to making your company stronger and more competitive. However, sometimes companies are not clear about what they can do to support the professional development of their employees.

Encouraging your staff to grow and develop as older workers can help them feel included, respected, and appreciated. Albert Einstein said that if you continue to do things as you have always done, you will get the same results. That is why if you want to foster employee growth, you will need to adopt new strategies and attitudes within the workplace. To do so, why not try the following techniques:



## Build healthy relationships with your team

- Maintain consistent communication
- Show appreciation and respect of others
- Speak well of team members
- Be positive
- Create safe spaces

## Develop experiences

- Encourage team members to demonstrate their potential
- Allow employees the opportunity to put their skills into practice
- Provide learning opportunities inside and outside the workplace
- Offer new challenges
- Engage workers in new initiatives/programmes/projects/etc.

## Focus on career plans

- Encourage employees to create career plans. Ask questions such as:
  - o “Where do you see yourself in five years?”
  - o “How do you want to progress in this company?”
  - o “What do you need in terms of support to achieve your goals?”
  - o Motivate your workforce to achieve their goals
  - o Celebrate success

## Make meetings a space for learning

- Make meetings a place to share experiences and learning.
- Allocate time for team meetings on a regular basis (once a week/fortnight/month)
- Encourage feedback and discussion in meetings that boost staff morale and productivity

## Learn to delegate

- Delegate tasks to your team
- Encourage task delegation among reverse mentoring teams
- Entrust your team with various responsibilities that can help them to demonstrate their capabilities

## Encourage employees to venture outside of their comfort zone

- Offer opportunities to employees that explore what goes on in other departments, areas, and allow them to try out tasks they would not normally do in their daily role.
- Train your employees so that they can fulfill and assume responsibilities that are outside of their regular responsibilities.

## Offer constructive feedback

Create constructive spaces where specific recommendations for improvement are discussed. This can encourage employee growth, motivation, and development.

Implement career and development plans that give employees the opportunities to prepare for future responsibilities and challenges.



## UNIT 3: MOTIVATIONAL AND EMPOWERMENT STRATEGIES

Employee motivation and empowerment is crucial to have a resolute and productive workforce. Motivation can be defined as the set of factors capable of provoking, maintaining, and directing behaviour towards a goal. Motivation is important for employees to want to do their jobs. Motivated employees help a business to run smoothly. If an employee is satisfied with their work, they tend to perform better and can help improve the company's processes and procedures. Therefore, it is essential to consider motivation within HR strategies, the different types of motivation, and how they interrelate. Employee retention is important, especially when it comes to retaining staff with specific skills that are difficult to find.

Employee motivation is something that goes beyond employee incentive programmes. The success of a company is related to the level of work motivation of its employees. Employees are the real engine of the business and the people who can make your company succeed or fail. Hence why employee motivation should be central to your HR policies. HR policies should go beyond the selection of personnel, hiring and payment of salaries, and incorporate the development of soft skills that help create a good working environment and ultimately lead to better results for your Company.

As an HR manager or SME business owner, it can be useful to learn more about motivational and empowerment theories that you can implement in the workplace. Employees must possess the skills and knowledge, and even the experience necessary to conduct the tasks that each position entails satisfactorily. In this way they will feel motivated and pleased with their work. Such empowerment theories include:

- Alderfer's ERG Theory
- Frederick Herzberg's Motivation Hygiene Theory
- The GROW model of Coaching and Mentoring
- Locke's Goal Setting Theory

### ALDERFER'S ERG THEORY OF MOTIVATION

Alderfer's theory builds on Maslow's Hierarchy of Needs and outlines how individuals are motivated by three types of needs: existence, relatedness, and growth. In the case of Maslow's pyramid, it is held that it is not possible to satisfy a higher level without first having satisfied a lower level. For example, according to this theory, if the third level, which corresponds to affiliation, is not satisfied, it would not be possible to move on to the next one, which is recognition. This is not the case in Alderfer's proposal. Although it is suggested that existential needs would come first, followed by relational needs and, lastly, growth needs; the model raises the possibility of simultaneously satisfying various aspects of various levels. There is not as much rigidity compared to the classic Maslow pyramid.

In other words, this model admits individual differences, with, for example, some people who choose to prioritise their personal growth and others who choose to pay more attention to their interpersonal relationships. It should be noted that Alderfer's proposal raises something new with respect to Maslow's pyramid, and that is the principle of frustration-regression. According to this, if a higher need is not satisfied, the person becomes frustrated and chooses to satisfy lower needs in the hierarchy.



According to this theory, if an employee does not feel that they have had enough growth opportunities, they can become demotivated and frustrated. Below, we put this theory into a work-based context:

### 1. Fulfil your employees' existence needs

As an employer, make sure that the needs of your employees are met. Ask them the following questions:

- Are the working conditions satisfactory?
- Is the workplace safe?
- Is there enough security?

### 2. Check unsatisfied relatedness needs

Employee satisfaction rates can decrease if your employees don't enjoy healthy relationships with their colleagues. Try team-building exercises and activities that strengthen employee relationships. This can work well for intergenerational workforces to close the gap between employees. Try to adopt the following techniques:

- Make the workplace an environment where employees feel comfortable
- Check-in on employees who may work isolated from others
- Implement team-building exercises that strengthen employee relationships

### 3. Focus on growth

Ensure to provide opportunities for employee growth. This is vital among workers who are over the age of 45 years. This increases motivation and helps employees to feel more recognised within their roles. As a manager, you can help them to realise their potential and become the best versions of themselves. Ask them the following questions:

- What opportunities would help you to grow within the company?
- Do you feel valued in your role?
- What are your current short-term and long-term goals?



### Herzberg's Two-Factor Theory

Herzberg proposed the "Two Factor Theory", also known as the "Motivation and Hygiene Theory". According to this theory, people are influenced by two factors:

1. Satisfaction which is the result of motivational factors. These factors help to increase an individual's satisfaction but have an insignificant effect on dissatisfaction.
2. Dissatisfaction is the result of hygiene factors (see picture). If these factors are missing or inadequate, they cause dissatisfaction, but their presence has a trivial effect on long-term satisfaction.

According to Herzberg's research, when hygiene factors are optimal, they prevent employee dissatisfaction, and when hygiene factors are unsatisfactory, they cause dissatisfaction. This theory outlines current satisfactions and dissatisfactions that employees face in their role. To implement this theory in the workplace, ask your employees the following questions.

- Think of a time when you felt especially good about your job. Why did you feel that way?
- Think of a time when you felt especially bad about your job. Why did you feel that way?

Assess how your employees feel about working environment hygiene topics such as company policies, supervision, salary, interpersonal relations and working conditions. Then ask them to consider what motivates them. This fulfills individuals' needs for meaning and personal growth. This area focuses on achievement, recognition, job role, responsibility, and advancement.

### The GROW Model of Coaching and Mentoring

The GROW Model is a coaching model that forms the backbone of coaching in many companies. It helps people to achieve success on both personal and collaborative levels.

**G – GOAL**  
*What do you want?*

**R – REALITY**  
*Where are you now?*

**O – OPTIONS**  
*What could you do?*

**W – WILL**  
*What will you do?*

The GROW Model works to inspire and challenge employees. It promotes confidence, self-motivation, leading to increased productivity and personal satisfaction. Discuss with your employees what their current goals are. The questions outlined in the GROW method can help employees to dig deeper into their own awareness. To facilitate the implementation of this theory, consider asking employees the following questions:

### G – GOALS

- What do you want?
- Over what period?
- Where would you like to be on a scale of 1–10?
- Imagine you have achieved it:
  - o What does it look like?
  - o How do you feel?
  - o What are people saying to you?
  - o What are the benefits?
- What do you want to achieve in five years/one year/three months?
- How could you say your goal in a few words?
- Which part of that is the real focus?
- How will you know when you have achieved it?
- In an ideal world, what do you really want?

### R – REALITY

What is happening at the moment?

How important is this to you?

If an ideal situation is ten, what number are you at now?

What impact is this having on you/how do you feel?

What have you done so far?

Who else is affected?

What are you doing that's working towards your goal?

What are you doing that is getting in the way of your goal?

### O – OPTIONS

What are your options?

What could you do?

What else?

If there were anything else, what would it be?

What has worked in the past?

What steps could you take?

Who could help you with this?

Where could you find out the information?

What might someone else do in your shoes?

Imagine you have achieved your goal; look back on the journey and tell me you got here.







## W – WILL

- What will you do about that?
- How will you do that?
- When?
- What will it take for you to commit to that action?
- What could you do to become more committed?
- Could you do more?
- How many?
- How much?
- How often?
- Where will you find that?
- Who will you talk to?
- What else could you do?

## LOCKE'S GOAL SETTING THEORY

Edwin Locke proposes a goal setting theory of motivation. This theory outlines how goal setting is inextricably linked to task performance. It works to raise incentives for employees to complete tasks quickly and effectively. Hence, leading to better performance by increasing motivation, efforts, and feedback quality. It focuses on five key areas that help employees to identify and achieve their goals:

1. **Clarity:** In order for a goal to be understood by the employee it should be clearly defined and measurable with an associated time frame for completion.
2. **Challenge:** A goal should stretch an employee and not be easily attainable. It should be challenging and potentially outside the employee's comfort zone, but still be realistic.
3. **Commitment:** For a goal to remain relevant, an employee needs to commit to it. There is very little benefit in setting goals that are of no interest to the employee and that they are not willing to put the effort in to achieve.
4. **Feedback:** Managers/HR should provide feedback to the employee on their progress with goals during regular catch-ups and also during their review period. Feedback should be honest and constructive so that if the goal has not been fully attained the employee understands what they need to do to reach it. The employee should also be encouraged to feedback on how they found striving to reach the goal, to assess its usefulness.
5. **Task complexity:** Difficulty is a very important factor when setting goals. Goals should be challenging but not impossible to reach. If a goal is too complicated or relies on too many factors, it may need to be re-considered or revised.

This goal setting theory can boost employee motivation, especially among older workers. Goal identification guides employees to increase motivation and self-confidence. To use goal setting theory in the workplace you can:

### Identify the purpose of the goal

For example, you could ask an employee to learn a new skill or to use a new computer programme. This ensures that an employee has a defined outcome of their task and can motivate them to feel empowered through building competences.

### Meet with employees

If you are encouraging employees to meet certain goals, schedule a meeting whereby they can discuss this process with you. Get the employee's opinion on the need for the goal and ensure the employee understands their responsibilities in terms of accomplishing the goal.

### Develop a plan using the SMART model

Discuss how the employee can accomplish goals through the SMART model (specific, measurable, achievable, realistic, time-bound). An example of a SMART goal, could be something like this:

*By January 2024, Tom will have successfully led the delivery of the company's sales pitch to at least 2 prospective clients in the main boardroom.*

### Ensure that employees have what they need for goal accomplishment

Firstly, you should make sure that they have the necessary equipment, time and resources needed to accomplish their goals.

### Provide feedback

Have regular check-ins with employees to assess their progress, review their action plan and discuss the results achieved. When your employees meet goals, provide positive and supportive feedback that can motivate them. If an employee struggles to meet their goals, support them with constructive feedback to help them try again or revise their goals according to what is realistically achievable.

### Starting the coaching conversation

As we have read throughout this Handbook, today's companies need and rely on their managers or team leaders to unlock the potential of their employees and create environments where people are supported, engaged, and empowered to give of their best. This means that you need to develop individuals and teams that use the knowledge and experience they have to make decisions, to problem solve on a moment-by-moment basis, and work towards shared goals. In terms of employee growth, we want to unleash fresh energy, innovation, and commitment from those they work with, listen to people's ideas and opinions, and decide together on the best way forward. Talent management is about helping people to develop and grow, work independently, and take personal responsibility.

To help you get started with this element of coaching, in the section below, we will step-through a potential employee challenge that is inhibiting growth and impacting on performance. In this scenario, employee motivation is low, and it needs to be addressed. For the purposes of this example, we are using the GROW model as described above.

**SCENARIO:** John has been working with the company for several years, he is 52 years of age and is regarded quite well, and his work would usually be of a high standard. Lately, he has been quiet and gets lost in insignificant project details. He is disinterested and generally unmotivated in the office and other people have commented on this too. He is not contributing at meetings and not using his skillset. You, as his manager and coach, are due to have a meeting with John as part of the company's talent management process.

In getting started for your session, consider the following:

DO	DON'T
<ul style="list-style-type: none"> <li>• Prepare for the meeting</li> <li>• Get some feedback on what has gone well/not gone well for John</li> <li>• Be curious</li> <li>• Have a mind-set of wanting to help John get "unstuck"</li> <li>• Use the information you know to prepare</li> <li>• Reference your previous meeting notes in advance to get some hints and tips based on what you know...</li> </ul>	<ul style="list-style-type: none"> <li>• Make assumptions about the reason for underperformance</li> <li>• Rely solely on other people's comments and opinions about John – remain open minded</li> <li>• Go into the meeting unprepared</li> <li>• Criticise or compare John's performance to how it was previously</li> <li>• Give John the impression he is being discussed in the office</li> <li>• Avoid phrases like "We've all been there" "That's happened to me. This is what I did" "Snap out of it"</li> </ul>
SUGGESTED CONVERSATION	
<ul style="list-style-type: none"> <li>• Know what "good" looks like from a performance perspective for John and compare that to his performance now. Understand what has changed</li> <li>• Plan to ask questions such as "<i>When you <b>are</b> feeling motivated, what are you working on? Who are you working with? What about that do you enjoy?</i>"</li> <li>• Words such as "stuck" and "disinterested" are clues. Consider the types of questions that could unlock this behaviour and makes a note of some of them in case they are needed</li> <li>• Reflect on the support he has provided or made available to John over the last few months to ensure they have been offered and appropriate</li> <li>• Consider what projects/roles are on the horizon that may appeal to John</li> <li>• Note: Pre-prepared questions and ideas should only be introduced in the session if appropriate.</li> </ul>	



## SUGGESTED PREPARATION:

- Know what “good” looks like from a performance perspective for John and compare that to his performance now. Understand what has changed
- Plan to ask questions such as “When you are feeling motivated, what are you working on? Who are you working with? What about that do you enjoy?”
- Words such as “stuck” and “disinterested” are clues. Consider the types of questions that could unlock this behaviour and make a note of some of them in case they are needed
- Reflect on the support he has provided or made available to John over the last few months to ensure they have been offered and appropriate
- Consider what projects/roles are on the horizon that may appeal to John
- Note: Pre-prepared questions and ideas should only be introduced in the session if appropriate.

### SUGGESTED CONVERSATION

### COMMENTARY

**COACH:** *John, we are meeting today as the next scheduled checkpoint in your personal development plan, check in with how things are going and work together on something you might want to move forward with. How are things going now?*

- Outlines the purpose of the meeting
- Ask an open question to get John talking.

John says things are going “okay” **but the coach can tell that there is more to be said by reading John’s body language**

This is a key moment in the coaching session and an opportunity for the coach to build trust and gain further understanding

**COACH:** *Just, Okay? Tell me more about why that is the case*

- Reads non-verbal cues
- Uses John’s language to respond showing empathy.
- Uses another open question
- Creates a “safe environment”
- Conveys interest by using body language to encourage John to share more – eye contact, nodding
- Active Listening

SUGGESTED CONVERSATION	COMMENTARY
John opens up about feeling overlooked and unchallenged at the moment.	Using the GROW model the coach works through the various stages with John, adapting the questions accordingly.
<p><b>COACH:</b> <i>If I understand what you've said correctly, you feel underutilised at the moment and a little bored. It's not that you are not busy, but the work is boring, is that correct? [John confirms] Okay, let's focus on solving that today. What I am hearing</i></p>	<ul style="list-style-type: none"> <li>• Empathises with Coachee</li> <li>• Checks understanding</li> <li>• Moves to the GOAL `Establishes objective for session Starts to define successi</li> </ul>
<p><b>COACH:</b></p> <ul style="list-style-type: none"> <li>• Thinking about your current role, describe exactly what about it bores you or is uninteresting?</li> <li>• At what point is it at its worst?</li> <li>• How is that affecting you?</li> <li>• What is the impact on the team?</li> <li>• What solutions have you tried so far to change things?</li> <li>• Have you ever felt like this before, if so when and what are the similarities? What action did you take then?</li> </ul>	<ul style="list-style-type: none"> <li>• Moves to establish how things are now - REALITY</li> </ul>
<p><b>COACH:</b></p> <ul style="list-style-type: none"> <li>• If you could change anything at the moment, what would it be and why?</li> <li>• What other ideas do you have?</li> <li>• Have you considered X?</li> <li>• If you could try any other role or project, what would it be? What excites you about that?</li> <li>• How could you introduce elements of that to your current role?</li> <li>• Where would you like to be in a year?</li> <li>• Who on the team, do you think, might find these elements more interesting than you do? Who would find them challenging</li> </ul>	<ul style="list-style-type: none"> <li>• Moves to explore OPTIONS available</li> <li>• Introduces the future projects that are coming up</li> <li>• Asking about projects that spark an interest may unblock John</li> <li>• Asks questions to find out about ambitions John may have that he hasn't disclosed.</li> <li>• Identify opportunities for growth or stretch for John</li> </ul>

SUGGESTED CONVERSATION	COMMENTARY
<p><b>COACH:</b></p> <ul style="list-style-type: none"><li>• What action do you need to take now and when to make that happen?</li><li>• What support do you need from others to make that happen?</li><li>• How will you gain that support?</li><li>• When would you like to meet again?</li><li>• What will progress look like for you between now and then</li><li>• So, what we have agreed is....?</li></ul>	<ul style="list-style-type: none"><li>• Moves to the Way Forward</li><li>• Looks for ideas, commitment, and action from John</li><li>• Summarises the next steps</li></ul>

In closing this chapter, it is worth remembering that it is important to recognise that talent means different things to different people, and the support you provide needs to nurture a culture of purpose and belonging. This is especially important for employees aged 45+ years. Encouraging employees to take initiative and step into new roles will reinforce the notion that your company cares about their growth and values the contribution they can make to the company. When employees believe their skills, perspectives and work are valued, they are more likely to remain engaged and loyal to their companies.





# CHAPTER 5: retaining key employees

*“Culture is what motivates and  
retains talented employees”*  
- Betty Thompson

# INTRODUCTION

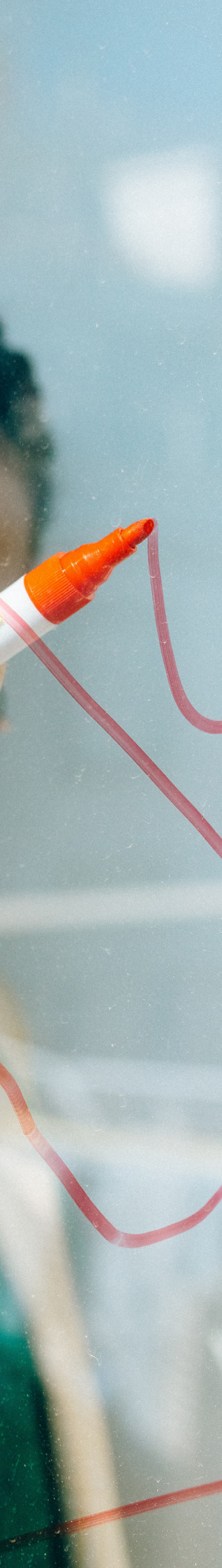
Retaining high functioning staff is one of the hardest challenges faced by a company. Over time, staff face challenges in their personal lives that will make them question if they can continue to be loyal to their employer. A company needs to be astute and recognise why an employee would prefer to stay, rather than move to a different company.

Undoubtedly, the labour market has entered a new era, because of advancements in innovation, knowledge development, globalisation, and overall competition (Sheehan, 2012). On the other hand, the financial costs of recruitment of new employees and low talent retention levels are major expenses for any company – and even more so for SMEs. Talent retention contributes to the overall success of a company of any size, as it is connected to employee turnover and can enhance organisational efficiency. To survive in an evolving and competitive environment, companies focus on retention and attraction rather than recruitment and selection (Holland et al, 2007). Throughout this process, talent management plays a crucial role.

The implementation of strategic actions is essential in managing employee retention. These actions include techniques to keep employees motivated and focused, so they want to stay in the company, but also remain productive. Moreover, a comprehensive employee retention programme plays a key role in reducing staff turnover and its related costs. Employee retention contributes greatly to a company's performance and overall productivity.







For employees aged 45+, the decision to remain in a company relies on their overall attitude towards their job, their flexibility and their employers' attitude. Employees who are engaged in a company's mission will stay longer, as this engagement produces a sense of belonging (Armstrong-Stassen & Schlosser, 2011). Some other factors that contribute to older employees' retention is the support they receive from their employers (Eisenberger, Stinglhamber, Vandenberghe, Sucharski, & Rhoades, 2002), adequate flexibility regarding working conditions (Bal, De Jong, Jansen, & Bakker, 2012), as well as personalised development opportunities (Govaerts, Kyndt, Dochy, & Baert, 2011). However, older employees are less likely to stay at a company where they sense that their skills are obsolete or that they cannot advance further in their careers (Kooij, de Lange, Jansen, & Dijkers, 2008). The willingness of employees 45+ to remain in a company are substantially shaped by their individual views regarding their employer's managerial efforts, as well as the overall working environment of the company they are in.

Taking into consideration the fact that retention is a critical issue faced by companies, it is vital that they are equipped with the necessary tools and anticipate impending shortages of talent in order to stay ahead of the competition. Companies that systematically manage employee retention - both in good times and in bad - demonstrate a higher chance of weathering challenges related to staff retention.

Keeping the above in mind, it is important for employers to focus on staff retention, and therefore on reducing staff turnover. The main reasons companies should focus on staff retention include:

- Staff turnover is costly in time and money
- Unwanted staff turnover negatively affects a company's performance
- Given the current shortage of talent, retention of sought-after employees may become increasingly challenging.

The following section provides a range of retention techniques and strategies and tools that can be used by SMEs to help retain their employees aged 45+ in the long-term.



# UNIT 1: REWARD AND RECOGNITION

According to many studies, employees become embedded in their jobs, and as they participate in their professional life, they develop a web of connections and relationships. When leaving a job, these connections and relationships can be severed and rearranged. Therefore, the more embedded employees are in a company, the more likely they are to stay. This is achieved through employee engagement, which companies can increase in a variety of ways. Some examples include providing mentors, designing team-based projects, encouraging employee referrals, cultivating team cohesiveness, and providing clear communication about the company's values and culture. Offering financial incentives based on tenure or unique incentives that are uncommon elsewhere may also contribute to employee engagement.

Employee retention relies on employers being responsive to the wants of employees. According to research, prior to the COVID-19 pandemic, nearly a third of employees sought out a different job because their current workplace did not offer flexible work opportunities. Following the pandemic, a considerable number of workplaces offer remote and flexible scheduling opportunities, a factor which benefits both the employee and the employer, by contributing to work satisfaction.

Moreover, it is a well-studied fact that employees want to be recognised for their achievements. This recognition contributes to fostering a positive workplace culture and employee experience, therefore positively affecting employee retention within a company (Baskar, 2013). Another factor that contributes to employee retention is the opportunity given to employees to move around within a company, whether to new jobs in different departments or promotion within the same area of work.

Benefits can also play a key role in employee retention. When a company offers a competitive benefits package, in addition to competitive pay, it reduces the likelihood of employees searching for new opportunities elsewhere. Offering a competitive salary may be quite challenging for many SMEs, but you should know the average salaries for the roles you are hiring for, so you can try and match them as closely as possible. Although it can be challenging for SMEs to match higher salaries, there are elements other than salary that can attract employees and make them want to stay. An important factor to consider is equality. If team members feel they are compensated equally, they are more likely to feel part of a team and be motivated to remain in the company.



## Creating a rewards and recognition plan

Taking into consideration all the benefits listed above, your SME could greatly benefit from creating a rewards and recognition plan tailored to your company. There are various ways of showing appreciation to your employees, and they all depend on your business setup and activities.

The three most common types of rewards are the following:

### 1. Performance awards

Performance awards are given to employees that demonstrate exceptional performance. They act as a means of recognising top performers, but also as a means of encouraging other employees to strive to reach the same level of performance as award winners. Whilst it is important to recognise strong performers, it is also worth mentioning that this type of award can lead to ill feeling if they tend to always be received by the same people. It is important to try and spread performance awards, whilst ensuring that they remain relevant and are applicable to a real achievement.

### 2. Peer-to-peer (P2P) recognition

In peer-to-peer recognition, the appreciation of an employee's work comes from their peers. This type of recognition also has a dual purpose. On one hand, to recognize employees for their efforts, and on the other to cultivate collaboration and team spirit. P2P recognition is generally presented via thank you notes and peer awards. Thank you notes are formal written cards that employees can exchange with each other as a means of recognising their dedication and guidance.

Peer awards are typically monetary awards whereby employees nominate colleagues for performance awards at regular intervals. In this way, the award is effectively peer-led and can act as a confidence boost for the employee receiving the award and should appear fair and deserved by their co-workers. Companies typically allocate a pre-defined budget for peer awards, which is usually big enough in value to be appreciated and small enough in value to allow the award to be repeated on a regular basis.

### 3. Milestone awards

Milestone awards are usually given to show recognition and appreciation to employees when they reach a specific employment tenure (for example, 5-year work anniversary). This type of reward can act as an incentive for employees to remain and showcases the benefits of remaining with the company to colleagues.

## Metrics and Reporting

An employee recognition programme should also include a means of measuring the value it creates. Although most SMEs do not measure the return on investment of their employee engagement or recognition programmes, the findings are crucial in keeping programmes relevant and current. A simple way for SMEs to determine a programme's effectiveness is by evaluating the following:

- Are the rewards offered adequate, fair, competitive, and appropriate?
- Did the programme meet its objectives?
- Did the programme influence change in processes, or did it support the Company's other performance initiatives?
- Does the programme have appropriate levels of communication?
- Do employees find the programme meaningful?
- What changes should be made in the programme for the future?

## Benefits of retention

Employers that systematically manage employee retention through reward and recognition —both in good times and in bad—are more successful. They are generally better able to cope with talent shortages as their employees are more motivated to stay.

### *i. Cost Reduction*

First and foremost, retention through reward and recognition helps reduce staff turnover. Heavy staff turnover causes the following:

- High recruitment expenses
  - o Annually, trillions of Euros are spent by corporations on finding and recruiting replacement workers. These costs include advertising, interviewing, and screening, as well as onboarding expenses, such as training and management oversight.
- Unwanted staff turnover negatively affects the overall performance of a company.
  - o Productivity tends to go down, engagement is lower, customer service issues typically arise, and a negative impact can be felt on company culture, all of which compounds the cost of heavy staff turnover.
- The retention of talent becomes increasingly difficult as the availability of skilled employees decreases.

### *ii. Morale Improvement*

A “revolving door” environment may dampen employee morale, as it not only affects employee connections, but also results in heavier workloads and responsibilities for the employees that remain. As a result, the remaining employees’ motivation and satisfaction levels are negatively impacted.

When staff turnover is frequent, it can become contagious. Employees may decide to leave because they notice co-workers job hunting, talking about quitting or leaving the company.

Having a successful employee retention programme helps companies to lift employee morale and create positive emotions in the workplace. If these positive emotions become contagious amongst employees, retention becomes far easier.

### *iii. Experienced employees*

One of the most crippling costs of staff turnover is the loss of institutional knowledge, skills, and relationships within the company after an employee leaves. In addition, the company faces the “opportunity cost”, which refers to the loss of the potential value the employee could have delivered if they had remained and reached their full potential. Moreover, when an experienced senior employee departs, it has an impact on succession planning.

Even during times of high unemployment, top talent is often at risk of turnover. Therefore, companies that focus on retaining senior and experienced employees see significant returns, as these professionals are adept at solving complex issues on their own.



#### *iv. Recruitment and Training Efficiency*

The replacement of an employee entails substantial costs, as it requires searching for a replacement qualified employee, recruiting, onboarding, and then training. If a new employee leaves, the money invested in this procedure is wasted.

By focusing on employee retention, recruiting costs can be dramatically reduced. Another consideration is to recruit from within the Company. The financial costs associated with training and re-skilling an employee from within the firm, usually results in large savings.

#### *v. Increased Productivity*

Persistent staff turnover results in several issues for employers, with the most immediate impact being loss of productivity. On average, it takes one to two years for a new employee to reach the productivity levels of an existing employee. Moreover, new relationships need to be built from the ground up, both with co-workers and customers. An understaffed environment creates a lot of challenges, including employee overtime and burnout, lower work quality and delays.

Successful employee retention results in maintaining productivity. High-retention workplaces tend to employ people who demonstrate higher levels of engagement, and, in turn, are more productive. These employees are more likely to improve customer relationships. Teams with strong foundations tend to be more productive.

#### *vi. Better Customer Experience*

Customer experience is a customer's perception or opinion about their interactions with a business, ranging from the very first interaction to post-sale support. These interactions are based on the employees of a company, whose own experiences shape the way they engage with customers.

Heavy staff turnover can take its toll on customer experience. For example, new employees might need more time to complete a task, may be less adept at problem-solving and may be more prone to mistakes — all of which can have a toll on customer experience. This can lead to a company's reputation being put at risk, as customers might share their negative experiences with others. Conversely, satisfied employees typically have higher morale, and this is subconsciously apparent to customers and contributes to a better customer experience.

#### *vii. Improved Corporate Culture*

Corporate culture has a key role to play in recruiting and retaining the right people within a company. The perceptions, preferences, and behaviours of employees all feed into the culture. When an employee leaves, this event may trigger other employees to question why they are leaving, and they may start questioning their own loyalty to the company. On the other hand, if an engaged employee who is aligned with a company's culture remains, they strengthen the organisational ethos and environment.

### *viii. Better Employee Experience*

Employee experience is an employee's perception of their interactions within a company. It incorporates their experiences from when they first applied for a position to when they leave the company. Employee experience takes into consideration the person's professional relationships with co-workers, managers, and customers. Productivity is significantly affected by a positive employee experience, which therefore contributes to positive customer experiences, and greater customer loyalty.

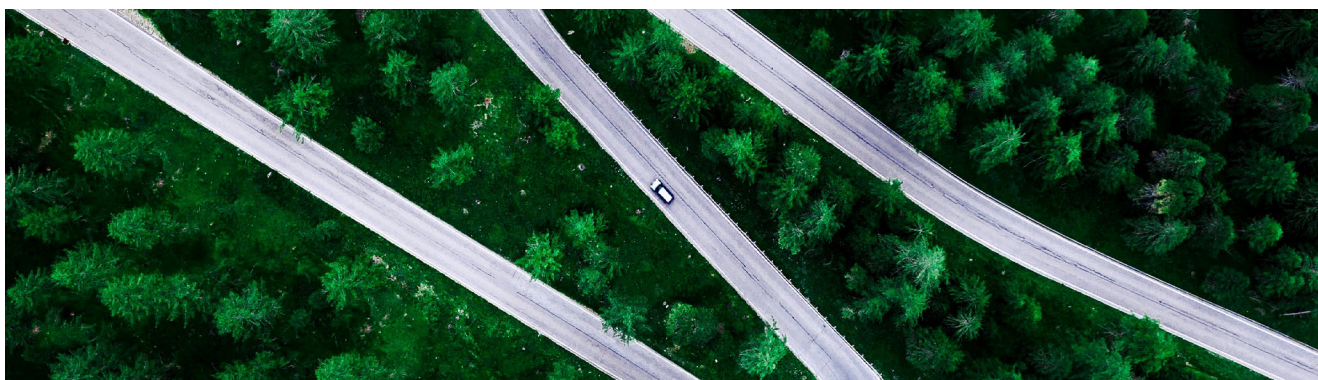
Employee experience is impacted by lots of factors, many which are outside the HR department's control. However, companies can build a positive employee experience and drive retention from the beginning, by focusing on the employees' needs and preferences.

### *ix. Increased Revenue*

Employee retention inherently helps a company save money by reducing hiring costs and retaining the increased productivity and good customer experiences that an experienced and highly motivated employee can deliver. It is important for HR to keep track of employees so that they continue to remain engaged and grow, ultimately leading to them wanting to stay.

### *x. Improved Employee Engagement and Satisfaction*

A positive employee experience positively affects employee engagement. Engaged employees feel motivated and care about their role within the company and are more likely to stay. Employee satisfaction and morale are interlinked with the level of engagement, all of which are fundamental factors contributing to a company's success.



## **Conclusion**

A keen focus on employee retention undoubtedly pays dividends across the company. Designing, implementing, and maintaining an effective employee retention strategy is a fundamental component of comprehensive workforce planning.

Although the creation of an effective employee retention approach requires significant effort, time, executive oversight, and targeted investment, it pays off for the companies in the long run. Companies that fail to focus on employee retention and staff turnover reduction may come across significant challenges, not only in terms of the high costs related to finding, recruiting, onboarding, and training replacements, but also in terms of decreased productivity and knowledge, more negative customer and employee experiences, lower morale, and weaker corporate culture.

In the following chapter, employee retention techniques and a suggestion for a comprehensive retention strategy are presented to aid you in the process.

## UNIT 2: EMPLOYEE RETENTION TECHNIQUES

As important as it is to understand the reasons that valued employees stay at a company, it is just as important to understand the reasons that drive them to leave. There are many reasons why employees decide to leave their roles and move on. It might be that they find a different job, that they continue with their education, or relocate. Some employees may decide to retire, and others may quit on impulse. Typically, an employee's reason for leaving will fall into one of the following 4 categories:

### 1. *Employee dissatisfaction*

Creating a lasting impression on employees is important, and fairness and transparency are fundamental yet powerful concepts in this process. The five factors identified as the leading contributors to job satisfaction are the following (Society for Human Resource Management, 2017):

- Respectful treatment of all employees at all levels.
- Compensation/pay.
- Trust between employees and senior management.
- Job security.
- Opportunities for employees to use their skills and abilities at work.

A successful employee retention programme relies on employee job satisfaction and engagement. Addressing these factors is important, but it is a time-consuming process. In the long run, the time and financial resources needed to implement a retention programme pays off and leads to increased performance, productivity, good employee morale and high-quality standards. Companies with good retention programmes will decrease staff turnover and reduce employee-related issues. The bottom line is that by investing the time and money in developing employee retention programmes, companies will be successful in retaining talented and motivated employees who are focused on contributing to the Company's overall success.

### 2. *Competitiveness*

A company's offering compared to its competitors' is key to its success in attracting and retaining staff. If your rewards, development opportunities, and the quality of the work environment is considered better than other companies in your sector, employees will naturally be more inclined to stay. You should also be prepared for the eventuality that your employees might be offered a position at a competitor and consider how you might convince them to stay.

### 3. *A planned change*

Planned changes refer to exits based on personal circumstances. The more flexible and considerate you can be towards employees' personal circumstances, the more likely they are to want to remain with you or come back in the near future. Employees may have a predetermined plan to quit as part of their personal life. For example, following the pregnancy of a spouse, a job advancement opportunity, or even an academic opportunity. If you are willing to consider their circumstances and adapt to help accommodate them, you will be able to retain staff that plan to leave. For example, if a company is facing exits as a result of family-related plans, more generous parental leave and flexible working hours, may convince them to stay. If an employee does decide to leave for personal reasons, if they can see you have made a big effort to try and accommodate their needs, they will appreciate it and will be more inclined to want to return to work for you in the future.



#### 4. A negative experience (impulsive)

If employees have a negative experience in the workplace, they may decide to leave without having any predetermined plans. Often, this can happen because of a negative response to a specific action, such as not being promoted or experiencing challenges with a supervisor or colleague. In these cases, analysing the types of work-related issues that are driving employees to leave is crucial. Additionally, when dealing with impulsive exits, companies should consider if and how they could avoid a similar situation from occurring again. It may be that training or additional support mechanisms are required, such as conflict resolution procedures, alternative work schedules or employee assistance programmes.

### Retention strategy for SMEs targeting employees 45+

Developing a comprehensive retention strategy for employees 45+ can help your SME be better prepared for future challenges. Developing such a plan is essential, as according to Jerry W. Hedge, (programme director at RTI International, North Carolina), “[a] large firm can absorb losses more easily [but] with a small business, if you lose a valuable older worker, it’s a much bigger hit.”

Below, five low-cost strategies are presented to help your SMEs retain older talent. These strategies can be tailored to your company’s needs and specific characteristics.

#### 1. Express to your employees 45+ that you want them to stay

Employment predictability and security are issues that concern older employees. The issue of no longer being needed or wanted in a company is a possibility that employees 45+ keep in mind. To boost your older employees’ morale and retain them in your SME, make sure to regularly express that you want them to stay and that they are valued. Additionally, you can set up a mentoring programme, where older employees share their knowledge and experience with younger staff.

#### 2. Provide the option of flexible schedules

People aged 45+ are more likely to have greater responsibilities and commitments in their personal lives. If you allow them greater flexibility in managing their schedules and working hours, they are likely to use it constructively. For example, an employee with children at home, will most likely try to maximise their productivity during working hours if it means they will then have more time with the kids afterwards. If the scenario works, the employee will be more motivated and happier to remain in the company.

#### 3. Provide a variety of benefits and let employees choose the ones they want

Employees of different ages and different stages in life value different benefits. As employees age, their needs change and so do their views on different perks. Therefore, providing a variety of benefits to your employees and letting them choose what is more suitable and appealing to them can help to retain older employees. For example, if a team has worked overtime, a younger person may prefer to be paid for the extra hours they have worked, but an older colleague may prefer to have the time off in lieu instead.

#### *4. Slow the exit of experienced talent with phased retirements*

Provide phased retirement plans for your employees approaching retirement age, where they reduce their hours slowly over a prolonged period. This approach creates a smooth transition for both the employee and the company and delays the employee's exit as well as the loss of their institutional knowledge. A potential danger with this approach is that the employee is still expected to get the same amount of work done in less time, so it is important to consider that the employee's workload also needs to be scaled back to match their hours with this approach.

#### *5. Use training and education to increase engagement*

Two widespread, but false stereotypes of older employees are that they are resistant to learning and that investing in their training is not fruitful. On the contrary, employees aged 45+ are more likely to remain at a company than younger employees. Setting a plan in place for your older employees, which provides them lifelong learning opportunities enhances their loyalty to the company and boosts morale. By continuing to help older employees to develop themselves professionally, they are less likely to want to leave or retire early.





## UNIT 3: CASE STUDIES: STRATEGIES THAT SUPPORT THE RETENTION OF STAFF

A variety of practices that contribute to employee retention are crucial in all areas of HR, and all roles within a company play an important role in collectively developing and implementing multifaceted retention strategies. Both broad-based and targeted strategies - or a combination of both - may be needed, depending on the circumstances of each individual Company.

This unit explores several effective practices in different areas, which can be particularly helpful for a company in achieving its retention goals. These include:

**Recruitment:** Recruitment practices can strongly influence staff turnover and presenting applicants with a realistic job preview during the recruitment process has a positive effect on retention of new employees. If employees do not fully understand the role they have applied for and what working in your company will be like, they are far more likely to be dissatisfied and ultimately walk away.

**Socialisation:** Employee turnover can often be high among new hires. Delivering socialisation practices through a strategic onboarding and assimilation programme will help new employees get used to and understand their new environment and therefore become happier with where they are and what they are doing far quicker. Examples of socialisation practices include individualised learning experiences, formal and informal team activities that enable employees to get to know each other, and the assignment of senior employees as mentors.

**Training and development:** Employees need opportunities to continually update their professional skills and knowledge. Even if they feel happy in their environment and with the job they are in, if they don't feel they are developing new skills or learning anything, they are likely to get bored of the daily grind and ultimately decide to move on.

**Compensation and rewards:** An employee's decision to leave a company may be impacted by pay. There are three possible strategies a company can follow to avoid these instances:

- Lead the market with respect to compensation and rewards.
- Tailor rewards to individual needs and follow a person-based pay structure.
- Link rewards to retention (such as linking vacation days to longevity, offering retention bonuses or stock options to longer-term employees, or developing benefit pay-outs for pre-defined years of service).

**Supervision:** An important element of employee retention is fair treatment by supervisors. It is important the managers are able to build a strong rapport with their charges and regular management training is a good idea to make sure that teams work well, and that morale remains high throughout your company.

**Employee engagement:** Engaged employees are satisfied with their jobs, enjoy their work and the Company, and believe that their job is important. They will normally take pride in their company and believe that their employer values their contributions. It is important to be constantly aware of how you can continue to keep employees engaged, so that they remain motivated and keep their strong affiliation with the company.



## Broad-based Strategies

Broad-based strategies are directed at the entire company, no matter its size, and their aim is to address overall retention rates. Examples include providing across-the-board market-based salary increases, as well as tailoring the hiring process to incorporate retention-related criteria.

The data needed to implement the broad-based strategies can be derived by the following practices:

- **Retention research:** Research can reveal the primary drivers of staff turnover. Attending conferences and acquiring membership in professional associations can provide employers and HR departments access to the latest research on turnover and retention, which enable them to better understand how to implement staff retention plans.
- **Effective practices:** You should also consider good practices being implemented by other Companies. If somebody else is keeping hold of their talent and you are losing yours, what are they doing differently and what can you learn from their retention policies?
- **Benchmarking surveys:** By taking stock of where your company is in relation to the competition, you can gain a better understanding of why employees may choose to stay longer with one company over the other. By comparing tangible elements, such as pay, holiday, bonuses, working hours, travel, you can get an idea of where you sit as a Company in your industry and what your strengths and weaknesses are in terms of your employee offering.

## Targeted Strategies

You can use resources to target information on employee retention in your company. For example, exit interviews, post-exit interviews, remain interviews, employee focus groups, predictive turnover studies, and other qualitative studies. The data collected from these sources can be analysed to shed valuable light on any problem areas for employees and which strategies are most relevant and appropriate to develop and implement in response to them.

## Implementation

Employees in managerial positions play a crucial role in the effective and efficient administration of any employee retention strategy. For the programme to succeed, the employees in these positions need to be educated about employee motivation, retention strategies, benchmarking, and best practices.

### First steps

By following the steps listed below, a company can attain the information needed to determine the extent of any issues and to help shape the retention strategies that it implements in response.

1. **Determine whether staff turnover is a problem.** This first step can be completed by conducting employee turnover analysis, benchmarking, and an external and internal needs assessment.
2. **Establish a plan of action.** After the review of turnover analysis, benchmarking data and needs assessments, you can begin developing a retention plan. This step includes the identification of broad-based or targeted strategies.
3. **Implement a retention plan.** This step includes the execution of the relevant and appropriate strategies that have been identified as a response to your staff turnover analysis.
4. **Evaluate the results.** Following the implementation of the retention plan, the last step includes the evaluation of results to assess the impact relative to the cost. Have your efforts resulted in better employee satisfaction? Longer-term do you notice greater employee retention and lower proportion of staff turnover?

### Benchmarking

Establishing appropriate internal and external benchmarks is a crucial first step in preparing the implementation of any employee retention strategy. Within the framework of SMEs, each company's consortium can assist in developing benchmarking practices (Zairi and Whymark, 2000a, b).

The process of benchmarking uncovers a significant number of opportunities for SMEs in terms of evaluating their own performance against their competition. Furthermore, benchmarking enables SMEs to identify gaps in their performance and then detect the most suitable best practices (Voss, Ahlstrom, & Blackmon, 1997). Benchmarking can also be used as a process to determine and set goals for an SME, as well as performance objectives – which eventually leads to determining suitable tools for performance enhancement (Venetucci, 1992).



### External benchmarking

Benchmarking, along with a needs assessment, can shed valuable light on whether turnover is a problem for a company. Through the process of external benchmarking, a company compares its turnover rates against industry and competitor rates. The data collected by this process shows annual and monthly exit rates as a percentage of total employment and broken down by industry, geographic location, sector, etc. For an SME, external benchmarking can be implemented through other SME owners in your industry, or peers from government bodies such as the Chamber of Commerce.

### Internal benchmarking

Through internal benchmarking, a company can track its employee turnover rate across time. If the turnover rate rises, either overall or among particular groups, it may be a sign that a problem exists in the company.

### Checklist of steps in the Benchmarking Process

- Step #1: Determine what to Benchmark
- Step #2: Identify Best Practices
- Step #3: Compare Company Performance
- Step #4: Address Performance Gaps

Regularly monitor the final step and repeat the entire benchmarking process frequently. This will ensure that your company stays at the forefront of the competition and the performance goals set.

### *Dealing with common problems*

As with all strategic initiatives, there are some common problems associated with employee retention programmes. These include:

#### **Lack of senior management support**

In the event senior management does not highlight the value of employees and the retention strategy to managers and supervisors, supervisory employees are unlikely to focus on people-related issues. For a retention process to succeed, senior management needs to actively participate in it and involve all employees. This way, managers and employees will understand the true value placed on employees by the company.

#### **Perception of the retention programme as time and energy consuming**

Following the previous point, organisational commitment is crucial to the initiative, along with a clear understanding of how it is strategically contributing to the company's successful long-term performance. Lack of commitment leads to the perception that focusing on people is a waste of time. If a staff retention strategy is new to your company or receives a major update, it will be necessary for all employees to receive training on how it works to understand the central role that it plays to the company's future success. If a retention policy is clearly communicated at its inception, staff are more likely to come on board with it and appreciate its merits.

### *Costs and return on investment*

It may be difficult to put an exact figure on employee retention costs, but you should go into it with a budget and try to stick to it as closely as you can. In financial terms, the return on investment may be estimated by reviewing various metrics, such as staff turnover data, promotions/transfers from within the company versus external recruitment, absenteeism, discrimination complaints, etc.

### *Evaluation*

Any initiative or programme - especially one designed to retain a company's key talent - needs to be continuously evaluated to determine its effectiveness, but also to detect areas of improvement. Conducting an independent audit is an effective way of evaluating whether the programme works. For instance, you might discover whether certain types of employees (e.g., low-skilled, highly skilled, technical, professional, managerial, executive, etc) leave the company more than others. If that is the case, then these specific groups could be targeted to increase staff retention going forwards.

In addition to reviewing employee turnover rates and exit interview results, a company can conduct remaining interviews with current employees. These interviews will provide information on why good employees stay and what might make them leave. It is highly recommended that managers themselves conduct these meetings, after receiving proper training, as they have the most direct relationships with employees. In a case where an employee was thinking of leaving and had a change of heart following on from a retention offer, their reasons for staying could be particularly insightful.



## Checklist for Employee Retention

- Fulfill all promises or benefits to the employees in a timely manner. Do not promise anything you cannot realise.
- Show employees that they are valued in the Company.
- Treat employees as assets.
- Provide adequate and regular training to employees so they are well-equipped to face any challenge that might arise.
- Invest time in providing feedback to employees regarding their performance and support them whenever needed.
- Keep employees motivated.
- Nurture a healthy work environment and positive work culture.
- Implement an effective incentive policy to maintain high employee morale.
- Provide financial incentives to employees, such as bonuses.
- Create a positive career graph of each employee's new skills and qualifications and update it regularly



## COMPANIES THAT EXCEL IN RETAINING STAFF THROUGH BEST PRACTICES

### 1. CarMax

As a result of the economic recession in 2008, many companies were forced to save money by cutting employee perks, benefits, recognition programmes, and even by letting employees go. During those challenging times, CarMax decided to act in the completely opposite manner, by investing in employee programmes.

CarMax, led by CEO Tom Folliard, enhanced its existing employee training and development programmes, and encouraged and supported existing employees to earn promotions and pay increases. Additionally, the company focused on cultivating its own employee ideas via feedback to enhance their customer experience. Subsequently, those ideas were rewarded in valuable employee recognition programmes.

In essence, CarMax's retention strategy highlighted the role of the employees in the company and rewarded their work. During a conference in 2012, Folliard stated: "Take care of your associates, they will take care of your customers, and the rest will take care of itself."

### Takeaway for employers

- The employee retention strategy you develop must have employees and their needs at its core before any other business factors come into question.
- Do not try to save money by cutting from your human resources – it might be a quick solution, but it will not help you in the long run.
- Great results and profits come after you take care of your team and the people that take care of your business.







## 2. Hyatt

It is estimated that, on average, an employee stays with Hyatt for more than 12 years. It is evident therefore that the hotel chain has an effective retention plan in place. It offers a quality training programme, which allows management to identify and select potential candidates for leadership roles within their existing employee population.

Hyatt implements a training programme which is focused on listening and encourages employees to find new and creative ways to overcome challenges and accomplish tasks in the workplace.

The company demonstrates trust in its existing employees, by allowing them to provide recommendations for new hires. In fact, employee recommendations are the main source of hiring new employees at Hyatt. This strategy is positive on several levels: if you are recruiting people that fit your company well, it stands to reason that their friends will be like-minded and therefore also a good fit. By recruiting friends of employees, you are empowering the existing colleague by following their recommendation. The new employee will have the comfort of a familiar face to turn to and to learn from in a more informal way and is also more likely to learn the company culture far quicker than an unknown recruit.

Hyatt highlights the importance of diversity at the workplace, and they were even in the Human Rights Campaign's Best Place to Work for LGBT Equality list, while they are also praised for their commitment to hiring older and ethnically diverse employees.

### Takeaway for leaders

- Providing high quality education and training programmes to your employees is a valuable investment for your SME, which will contribute to retaining your employees longer.
- If you give your employees licence and flexibility to come up with their own solutions to everyday issues and foster a culture of opinion sharing within the Company, you will empower employees and help them understand the value of their contribution.
- A diverse workforce can help your company grow with different cultures and points of view often feeding into collective results in a positive way.







### Conclusion

It is crucial for employers to understand the benefits of attracting and retaining older employees in today's global economy. Employees aged 45+ can be highly valued as they carry years of knowledge, skills cultivated through the years and vast experience. Furthermore, they demonstrate other characteristics, such as a sense of dedication, strong work ethic and loyalty to their work role.

Keep in mind the below list of major factors involved in the retention of employees aged 45+:

- **Compensation** - Includes salary, rewards, bonus, health insurance, and retirement benefits.
- **Environment** - A healthy company environment motivates employees to perform better. Remember that positive workspaces create positive energy and therefore positive employees.
- **Growth** - Each individual employee needs growth in his/her career, irrespective of their age. An employee will expect to grow within the Company they are working in.
- **Support** - Cultivating and sustaining a support culture within a company helps employees to perform more efficiently, but also to grow professionally. Your role as an employer is to support your employees both financially and emotionally, to aid their performance and foster positive feelings of security.

It is important to remember that a workplace can be positively diversified by older employees and can even contribute to the company's competitiveness. A multigenerational company is better equipped to deal with a growing base of older customers.

In conclusion, it is evident that it is more efficient to retain a quality employee than to go through the process of recruiting, training, and orientating a replacement employee – even if the replacement employee is of the same or similar quality.

# CHAPTER 6: off-boarding & succession planning

*“Walk the talk and act on the issues that your leaver raises – this shows to the rest of your workforce that you actually value their feedback”.*

**- Ellen Joris, Chief Customer Officer at Talmundo.**

# INTRODUCTION

Offboarding is described as the formal disassociation process of an employee from a company. It covers all the systems which help to successfully part ways, be it resignation, retirement, or termination; a compassionate exit essentially speaks well of the company and its values.

To tackle the challenges of the future (such as demographic development and digitisation) as intended in the Talent4LIFE project, a good offboarding strategy is an essential part of talent management. Along with for example the retirement of baby boomers, a lot of knowledge leaves the workforce. If an offboarding process begins long before an employee retires, institutional knowledge and skills can be retained. Older employees can mentor and train younger employees to ensure a smooth transition.

Where, on the one hand, the onboarding activities efficiently introduce a new hire to company operations, and ethics, offboarding manages experiences in an employee lifecycle. Both these practices are critical to creating a memorable last impression. The former is concerned with providing a fresh recruit with all the essentialities to perform his duties; the latter is about their smooth transition for an uncomplicated, pleasant departure. In the end, both are about managing your company's reputation and optimising employees' working experiences.

## UNIT 1: PLANNING YOUR OFFBOARDING APPROACH

Offboarding starts with a plan of action. One that is thorough and compassionate enough to help your existing candidates, remaining employees, and your company to a better tomorrow. Additionally, a well-structured offboarding model is necessary to keep in line with the formalities which avoid legal or security threats.

### Significance and ethical issues of effective offboarding process

The significance of offboarding is clear from the fact that it is one of the three approaches - onboarding, performance management, and offboarding - which help develop a sound employer-employee relationship. This explains how offboarding is a crucial part of the provision of optimal employee experience. In combination with onboarding and performance management, offboarding gives companies the opportunity to create and imprint a consistent impression.

It is understandable that a departing employee will either become a good brand ambassador for your company or a bad one. To diminish the possibility of earning a bad reputation in the market, it is essential to offboard an employee with respect, dignity, and the right perception. This is why it is important to have an all-round offboarding process.



Once an employee decides to leave, their offboarding experience helps define their extended relationship with the company:

1. Advocates or brand ambassadors: all former employees are patrons of your company. As they explore other opportunities, they will share the experiences they had with your firm. Nothing beats free publicity from a former employee who had a good run with you and left with a favourable lasting impression.
2. Customer/ business and employee referral source: a happy, satisfied employee is not only an advocate for your company, but also a rich referral source. They will redirect potential employees and customers based on their satisfactory experience and may also help drive new like-minded talent to your door.
3. Circle back or boomerang effect: a parting employee may wish to reconsider after some time and return to work with your company again. It is not uncommon when employees have a great working experience at a company that they later decide they would like to come back after they have developed new skills and knowledge elsewhere. You may not want to miss out on this opportunity as someone familiar with your company norms, models, and operation will fit in far better and quicker than somebody entirely new. You also know what you are getting before you hire an ex-employee.

Ultimately if an employee's offboarding experience is a good one, you only stand to benefit from their advocacy in the future. Conversely a negative offboarding experience could easily lead to former employees painting your company in a negative light leading to potential reputation damage.

### **What is the difference between onboarding and offboarding?**

Both the onboarding and offboarding processes provide an employee with the necessary tools to have a positive start and end to their time at your company. The former does this by bestowing means and information to integrate an employee. The latter provides a set of exercises and formal undertakings to support the employee transition to their new job/life. Both onboarding and offboarding contribute to wholesome talent management. HR plays a crucial role in managing both processes speedily and effectively.

Whilst onboarding extensively introduces a new employee to company operations, norms, and policies, the offboarding model ensures their smooth transition as they leave the company.

### **Offboarding Process: a structural analysis**

As simple as it may seem, offboarding must be the right blend of formalities and familiarity. Formalities like an NDA, retrieving company assets, a formal resignation letter, compensation, etc. are necessary to avoid legal pitfalls. The more informal part of the process is used to gather valuable feedback, expertise, opinions, and knowledge before the employee departs.

An employee can either retire, be laid off/fired, or resign on their own accord. Whichever is the case, the offboarding timeline is nearly the same and continues in a similar structure. The offboarding process can be divided into 2 key areas: the time before an employee leaves, and the formal day of employee offboarding (departure).

## Before an employee leaves the company:

### 1. Receive/Issue a formal notice

In the case of a layoff, issue a formal notice depending on your contract. In the event of offboarding resignation, ask for a letter of resignation if not already tendered.

### 2. Complete the Paperwork

The moment you issue or receive notice, start preparing the paperwork, including:

- Letter of termination or resignation
- Non-disclosure agreement
- Severance package agreement
- After employment benefits (usually in case of retirement)
- Letter of recommendation

### 3. Work documentation

Ask the employee to document all their job responsibilities, duties, clients, projects, and keep track of transferable knowledge. It doesn't have to be in the form of a lengthy written document, but it's important that the knowledge is transferred in a way that it will be remembered by colleagues and new employees taking over.

### 4. Prompt Communication of the Offboarding

Communicating the offboarding process to the rest of the team is the best practice. HR notify all colleagues of the impending departure and arrangements for the transfer of knowledge and information etc.



## The formal day of employee offboarding

1. The day of offboarding should include a celebration to show gratitude to the employee who is leaving for their service. Normally the worker's manager will talk about some of the employee's key achievements and enjoyable moments with the team. It is also the responsibility of HR to collect all physical and non-physical assets, such as digital devices equipment, software access etc.
2. One of the most important aspects of the offboarding day for a company is the exit interview. This is an opportunity for HR to ask valuable questions that give insight into ground-level company operations and ask for suggestions for improvement. It is a golden opportunity to gain honest feedback on why the employee wants to leave the company and as such it should be conducted in such a way that the employee feels at ease and able to offer candid answers without feeling that they are at risk of compromising themselves.
3. If an employee has decided to leave the company, you should use this day to show gratitude towards them and to make them feel appreciated for their efforts and contribution. Throw a small lunch party, give a parting gift, and send off an employee with warm wishes.

## Six Best Offboarding Practices

Apart from the step-by-step offboarding processes, there are some essential practices to invest in and make it a huge success:

### 1. Disclose the change in a timely organised manner

To positively manage the change that comes with departure, prompt communication is key. Therefore, a fair offboarding practice is to announce the news as early as possible. This formal announcement prevents unwanted gossip and gives no room for fragmented information, keeping team members and managers in the loop. Ideally HR should decide with the employee when and how their departure will be communicated.

### 2. Perform an exit interview

The exit interview should be used as a tool to collect information about the entire work experience. You should try and understand the highs and lows the employee has experienced. The feedback will allow your company to fill gaps within the company structure and escalate employee satisfaction. Questions asked during an exit interview should revolve around gaining an insight on the following fronts:

- True reason(s) why an employee is leaving
- The employee's relationship with their manager.
- Perceived professional growth during the employee's time with the company.
- Feedback on company policies, culture, and work ethic.
- Suggestions for improvement.

### 3. Allocate time for knowledge transfer

Knowledge transfer is central to offboarding. It is the process where someone leaving the office is to transfer his knowledge to a colleague. It ensures smoother business operations, uninterrupted progress, and no speed bump in productivity. It is the responsibility of HR to ensure that before someone leaves the company, knowledge about their tasks and activities and customers/partners is passed on to colleagues. This process may take time and should be carried out in advance of the employee's departure day.

### 4. Reset system access and reclaim company assets

After an employee leaves, it is important to revoke access, close accounts, or change passwords for software and online accounts. This step leaves no room for security breaches and is necessary from a cybersecurity point of view. The IT team should normally do the following:

- Disable access to company emails.
- Remove the former employee from the internal systems/database.
- Automatically redirect their emails or phone calls to a supervisor/new employee for some time before shutting them down permanently.
- Remove them from upcoming meeting calendars.



It is also HR's responsibility to collect any hardware, tools, IDs and access cards the employee may have before they depart.

#### 5. Do not be a stranger

You cannot stop people from leaving, but you can ensure you maintain a cordial relationship or better. When you part ways on a good note, it is a good idea to keep in touch. You never know when your paths might cross again and an ex-employee with a good impression of your company can be a good referral source and foster networking opportunities too.

#### 6. Show gratitude

Any employee that was to leave would have given their fair share of expertise and provided some value during their tenure. It is important that you extend gratitude on behalf of the entire Company for their efforts. Throw a farewell party, say goodbye with a gift, send sincere wishes on a card, write a thank-you note, and show your appreciation.

### EMPLOYEE OFFBOARDING CHECKLIST: KEY COMPONENTS

A well-compiled plan lends a helping hand to execute employee offboarding in a more planned and systematic way. Just like an onboarding checklist, an equivalent written offboarding plan should also be in place. Here is a sample offboarding checklist comprising the best practices and steps.

#### Phase 1 – Before an employee leaves:

- Receive/Issue Notice
- Complete and file the paperwork
- Settle the final pay
- Document work for knowledge transfer
- Communicate the departure

#### Phase 2 – On the Day of Offboarding

- Reclaim physical/non-physical assets
- Update IT access/permissions
- Conduct an exit interview/survey
- Throw a send-off celebration



## Commonly made mistakes with Offboarding Employees

As representatives of the company, HR executives ought to take special care while handling sensitive matters like onboarding and offboarding. While onboarding is generally a very positive experience all round, the offboarding process can bring about mixed feelings, and it is easier to make a few errors. Below are some of the things you should avoid:

1. Treating a departing employee with negativity and contempt.
2. Overwhelming a departing employee with extra work during their notice period.
3. Looking for faults and giving a negative performance review.
4. Feeling personally attacked due to a person's decision to leave.
5. Not conducting an exit interview or holding one and rushing through it. This face-to-face discussion is the final chance to gather honest opinions and views. Inability to utilise it properly is just an opportunity lost.
6. Failure to know the reason why an employee is leaving and not making a counteroffer for them to stay. It is paramount to try to understand the reasons why someone is leaving your company. If you are pleased with their overall performance, you should try to convince them to stay. Consider giving them a raise or making modifications to their working environment but do try to change their mind.
7. Too many gaps in information and communication like incomplete paperwork, pending salary payments, and other incomplete formalities. All this leads to last-minute frustration for the employee and potentially a tarnished company reputation.
8. Alienating and neglecting former employees and not staying in touch. Unless you have a particularly bad experience with an employee and would not welcome back, they should feel like you are genuinely going to miss them, and they would genuinely be welcome back in the future.





## UNIT 2: THE ROLE OF FEEDBACK AND EXIT INTERVIEWS IN THE OFFBOARDING PROCESS OF SMES

“There are no second chances for the first impression – but also not for the final impression!”

The offboarding process of employees who decide to leave a company (or also where the company has decided to terminate the working relationship) is significant for the company itself. It is in fact equally important as a well-designed and planned onboarding process. It is easy to perceive the offboarding process as a waste of time as the employee has already decided they wish to leave the company. While new employees arriving in the companies are very much welcomed and supported, it can be tempting to not put the same effort into allowing somebody to leave. Offboarding at the end of the relationship with an employee may be the last impression an employee will have of that milestone in their professional life. A poor offboarding experience will leave a bad taste in the mouth of the employee leaving and can lead to consequences in the long run. Reputation is an important factor in attracting and retaining staff. There is no need for an employee to leave on bad terms and you should not underestimate the positive impact that a positive offboarding experience can have for your company.

*“Depending on the behaviour of both employee and company, offboarding has the potential to mirror a venomous divorce or an amicably conscious uncoupling, or anything in between”, Rachel Cooke, founder of Lead Above Noise.*

Of course, planning and implementing an offboarding strategy is not necessarily enjoyable and can require a lot of effort, but a well-executed offboarding experience will pay back to your company, even if it is not necessarily evident.

### 1. It is a future investment in your company:

The shortage of a skilled workforce has become a significant problem for productivity and competitiveness in European companies generally. The effort to search and find new well-skilled and competent employees has increased dramatically over the last years. It is therefore important that the company creates a positive image with current employees and equally with employees that wish to leave. Former employees will continue to spread the word about your company and can influence your employer branding a lot. If the final impression they have is a positive one, the leaving employees will naturally promote your company and possibly even become an advocate for job opportunities with their friends. Conversely, a 1-star rating of your company on Google compounded by a poor offboarding process can only damage your company's image.

### 2. It is a positive message to your remaining employees:

If you react to an employee's decision to leave your company by showing them disrespect, neglect, or even psychological punishment for their decision to leave, their colleagues will pick up on this and may well question why they are working in such an environment. If on the contrary you show respect for the employee's decision and try everything you can to convince them to stay, colleagues will understand that the employee is leaving of their own accord and that they are free to do so with good wishes. This second environment shows employees that they are valued and that they are at the centre of the company's plans.





### 3. It is a chance for feedback, reflection, and improvement:

The offboarding process and in particular the exit interview is an opportunity for both parties to speak about the company honestly and openly. It gives you and your company the chance to identify areas to improve and invest in for staff retention.

### 4. It is a support for the remaining staff / employees:

When an employee leaves a company, their colleagues will inevitably be impacted. Even if a new employee is hired, other colleagues in the team will typically need to cover some of the former colleagues' roles and responsibilities at least short term. The offboarding process helps to clarify which roles and responsibilities need to be passed on, who in the team they may be best passed on to and may also help identify any skills gaps presented by the unique knowledge the departing employee may have in specific areas.

The exit interview or talk with the person leaving the company is a formal and structured talk with the person leaving the company. It is an opportunity for you to show appreciation to the person for their contribution to the companies' success, as well as a possibility to exchange experiences, improvement potentials etc. Unless there is really no desire to re-hire the employee who is leaving, HR should express the offer to return to the company in the future.

An offboarding interview should always be offered to employees who are leaving. Whilst it may not reflect well on the employee to reject the opportunity, there should never be any negative consequence if an employee declines such an invitation. If the company has decided to terminate the working relationship, an offboarding interview is a bit trickier as there might be a lot of frustration, especially if the employee feels they have contributed well to the company and do not deserve to go. In this case the offboarding interview may be shorter and more likely to be rejected, but it should still be offered, and any opinions and feedback given by the employee should be taken on board, even if the company strongly disagrees with what is being said.

## Why is an offboarding interview important?

1. Employees will generally talk more openly about issues when they know that they are leaving a company. There is an opportunity to get a different view about problems and challenges in your company.
2. The farewell is not forever. Employees who are leaving (especially if they have management functions) will often keep in contact with remaining employees in your company and may still influence opinions from outside your company. For this reason, it is certainly better to have an appropriate and positive offboarding experience for them.
3. Former employees can play an important part in promoting your employer branding. If they have a positive offboarding process, they are more likely to recommend your company to friends as a potential employer and to recommend your products and services to other professionals or customers when in their new role.
4. Online information can stay eternally visible and thus a negative impression or comment on your firm can have a negative impact on your company's image. Conversely positive comments and ratings are likely to impress potential new talent looking to join your team. Existing staff might also think twice about leaving if they are surrounded by only positive endorsements from external sources.
5. Unless you have decided that to completely sever ties with an employee, you should always leave the door open for their return. Especially given the current skills shortage today, it is always good to keep them in mind and let them know that they would be welcome back. So-called "boomerang employees" can have a lot to offer, as they already understand the company culture and structure and will need far less time to settle in than an employee with no prior knowledge of your Company.

## How to conduct an offboarding interview properly?

The offboarding of employees should be considered a standard process in your company. For this reason, it is also important and useful to define standard steps and levels for the whole process including the offboarding interview.

To achieve and conduct a proper and useful offboarding interview, the following steps should be considered:

1. The offboarding interview is part of the whole offboarding process: The interview itself could and should only be a part of the whole offboarding process for a person leaving the company. It should not be a standalone action. It is important to clarify and decide the position of the offboarding interview within the whole offboarding process and if there are any specific questions that need to be asked in view of the underlying reasons the employee may be moving on.
2. Select the right person for the offboarding interview: The offboarding interview is a clear responsibility of the human resource department in a company rather than a direct supervisor, line manager etc. Where there is no HR function in your company, a neutral person from the company should be identified and lead the interview. Of course, it would be better if this person is trained in interviewing people, leading interviews, asking questions, active listening, and appreciative questioning etc. but ideally, they should be from a different function or viewed as separate from the employee's main working group/team.
3. Arrange a proper date for the offboarding interview: The offboarding interview is nothing for the final working day of an employee where often some celebrations are planned, and the person is usually very busy and not actually doing too much 'work'. The offboarding interview should be arranged two or three days before the person is leaving the company. You should agree on a date and time in advance, so that both HR and the employee are prepared.

4. The offboarding interview needs to be arranged in advance: The offboarding interview is not something that should happen shorthanded between doors and other meetings. The interview needs to be arranged well in advance of the employee leaving the company. The date, time and location of the interview should be made clear to the employee, and they should also understand that their participation is not mandatory and that they will not be treated any differently if they do not wish to take part. You should consider that employees may not have experienced an offboarding interview before and may not understand what it is for. It is therefore important to give some background to the procedure and benefit when arranging the interview. You may wish to consider sending a short agenda when you send the appointment so that the employee can prepare their answers. Remember that this interview serves not only as a vehicle to understand an employee's reasons for leaving but also as an opportunity to imprint a long-term positive image of the company on the employee that they will hopefully disseminate further.
5. Select a proper location for the interview: Your (HR) office with one person in front and one behind the working desk is not (!) an appropriate location for an offboarding interview. You should seek a calm and positive interview atmosphere. A round table would be a good idea, also a corner situation with a small table between is good. The confidentiality of the interview should be guaranteed.
6. Creating a positive interview atmosphere during the talk: The offboarding interview is a PR event of your company. You need to consider that the employee leaving the company in fact has little to gain from such an event but you as a company have a lot to win (and a lot to lose). The interview atmosphere is of course dependent on who has decided to terminate the working relationship, but in any case, the message for you - don't get defensive, listen closely, and record the information received. You should try to be friendly and open and avoid confrontation, even if you strongly disagree with what the employee is telling you. Make sure you put them at ease, so that it feels more like an informal chat. At this point, you should not correct or try to justify anything negative that the employee is telling you. It is also a good idea to hand over the reference letter at the beginning of the interview so that the employee does not have the fear that any critical answers or opinions will have an impact on the quality of their reference. In addition, you should make it clear that the interview is confidential.
7. The questions for the offboarding interview are prepared in advance and are standard questions: The questions for the offboarding interview need to be prepared in advance and should generally be the same for all offboarding interviews in the company. You should prepare the questions in a way that allows you to keep the conversation flowing and try to keep eye-contact, without taking too many notes. To record as much information as possible, consider using checkboxes which can be ticked and recording the interview, so you can go back over any specific comments made by the employee. It's a good idea to send questions to the employee in advance, so they can prepare their answers – you may also get more complete answers if you give them time to think about what they are going to say.
8. Properly ending the offboarding interview: the final word of the offboarding interview is on the employee! You should probably ask the employee if there is any additional information he/she wishes to communicate before shaking hands and thanking them for their dedicated service.
9. Analysing the offboarding interview: The most important part of the offboarding interview is the analysis. The first task is to separate relevant and important information from less important information. The fact that your vending machine does not offer Coke Zero is probably not so important, whereas the leadership style of a manager or a perceived lack of training opportunities are factors far more relevant to employee retention. You might consider using a dedicated interview analysis software to help identify trends and patterns that come up collectively from offboarding interviews.





## Key Questions for an offboarding interview:

1. How would you describe your time working with us?
2. What are the main reasons you want to leave the company?
3. What did you enjoy most about working here?
4. What didn't you like at all about working here?
5. Did you receive all the resources needed to get your job done? (e.g., equipment, support etc.)
6. What was your experience of management/leadership in our company?
7. What could we have done better to convince you to stay?
8. What is your opinion about current remuneration for your position?
9. Did you receive sufficient support in our company, and did you have internal development opportunities?
10. What is your opinion of our company in general as an employer?
11. What impressed you whilst working for us?
12. What was disappointing for you?
13. Is there anything else you want to tell us?

If applicable, you could also raise a few additional questions e.g.:

- What does your new employer offer you that we were not able to give you here?
- Are there any other reasons in your decision to change employers?
- How did you like working in your team?
- How would you rate your direct supervisor?
- How was the work-life balance for you in our company?
- What could / should be done to improve work-life balance in your opinion?

## What should be avoided during offboarding interviews?

There are a few things you should consider and try to avoid during an offboarding interview:

Not enough time (an offboarding interview should be planned at least for one hour)

- Having the interview between doors and not in a dedicated location / space
- Answering calls or messages during the interview
- Offending the employee who is leaving or making them responsible for actions, consequences etc.
- Inviting additional persons to the offboarding interview (the offboarding interview is always a talk between two persons)
- Breach of confidentiality (e.g., telling the leaving employee what others have said about him/her)
- Trying to influence the decision of the employee to leave the company (this is not the proper setting for this)
- Getting into conflict with the employee



## What are the potential learnings for managers?

A person who has decided to leave the company will always speak more openly and freely about issues that are positive and negative. This is a valuable source of information, even if not all negative issues raised were true. Potential learnings from an offboarding interview might include:

You can identify trends: where employees who leave the Company cite the same or similar reasons, this should point to the areas that need to be improved to retain staff.

1. You get insight: in an offboarding interview, employees will describe working situations, challenges of leadership, management from a perspective they would never do if they were not leaving. You will most likely get insight into your processes and daily work life in your departments from a totally different and hopefully detailed perspective. All insights may not appear true and objective to you, but at least the possibility of a different perspective is a huge value of an offboarding interview.
2. You can learn about what other companies are offering: One important question in your offboarding interview should always be what the new company is offering to the employee which your company wasn't able to. Hence, you can learn the gaps you need to fill to retain the employee and potentially to attract new employees and talents. In a second step, you could consider making similar or more attractive offers to retain the employee.
3. You can compare information and data from standardised questionnaires: through this comparison you will be able to identify patterns and see e.g., what is highly estimated by your employees and which elements do often receive criticism.
4. The offboarding interview is also a kind of PR event for your company and helps your employer branding. The better such an offboarding interview is, the more likely you receive a higher rating as an employer or company as a whole.



There is of course the risk that during such an offboarding interview your leaving employees are mainly expressing all their problems, frustration, bad experiences etc. for you it will be important to be able to distinguish between objective and relevant information and personal feelings between colleagues, frustration, private background of problems of employees etc. In any case the offboarding interview is a unique chance for you and your company to gain honest and open insider information on one hand and achieve a good final impression at the leaving employer on the other hand. Those two elements are the crucial ones and the main motivation for a professional planning and implementation of offboarding interviews.

## UNIT 3: SUCCESSION PLANNING

*"Succession Planning, like a relay race, has to do with passing on responsibility... Drop the baton and you lose the race"* - **William Rothwell, Author of Effective Succession Planning**

To run a business successfully, a well-planned strategic plan to fill positions which at the core of the Company is crucial. The task of succession planning and talent management often falls to human resource management. Therefore, HR Managers play an important role in planning for future challenges in a company. A well-thought-out succession plan is an important part of the overall talent management strategy. Succession Planning is a systematic process where companies identify qualified and talented people who are ready to move into key positions when needed. This will be important when current leaders or a hard-to-replace team member leaves the company. An important part of succession planning is to strategically plan and think about the development of employees. If there is no succession plan implemented in the company, it can lead to difficulties in maintaining leadership continuity or identifying leaders when needed.

### Why is it important to start with succession planning?

- Succession planning ensures the stability of the workforce
- Succession planning ensures the continuous and effective performance of a company through the strategic use of key people
- Succession planning helps to retain and develop intellectual and knowledge capital for the future and encourage individual advancement
- Succession planning helps to address strategic and operational challenges by having the right people in the right place at the right time to do the right things and get the right results
- Succession planning is proactive. The continuity of management positions is to be ensured primarily by promoting talent within the company in an ongoing process.

### Why do companies need succession planning?

#### 1. To tackle the challenges of the future

Succession planning is considered successful if it can be implemented despite changing conditions (keyword: shortage of specialists and managers) and, as a result, the company can (continue and as permanently as possible) devote itself to realising its purpose. The development of internal talent is particularly beneficial to meet the company's current and future talent needs. Succession planning not only applies to management positions or leaders, but there is also a need to extend it to any job category. In this way, many years of experience in a successful corporate culture can be passed on from departing employees to their successors. In today's unpredictable world, it is never too late to start with succession planning and be better prepared for the future.

#### 2. To be aware of critical roles

Succession planning is necessary to stay competitive. To be able to fill critical roles, it is crucial to understand which roles are key to your company and which are particularly difficult roles to fill. If a critical role is not occupied for a long period, it can have a significant impact on the delivery of results, the achievement of milestones or the fulfilment of budget requirements. Therefore, not only if the position is not filled but also a bad hire could create irreversible damage for the company.



### 3. To continue business successfully

You cannot forecast sudden changes, illnesses, disasters, accidents, or pandemics, but you can be prepared for what to do in case one should happen. If you start succession planning too late, an effective handover will be difficult. If the successor's decision is forced, ill-informed, or panicked, it could mean that the role falls into incompetent hands. Uncertainty and lack of leadership could have catastrophic effects on the company and within the company structure. The key to success here is to allow enough time to formulate an effective succession plan.

#### Risk and consequences of not having a succession plan:

- Putting the business at risk
- Loss of knowledge and experience from skilled or specialised employees
- Lack of knowledge of possible successors in the company
- Client's needs aren't met due to an increased workload if an employee exits suddenly
- Other employees may also leave if there is no clear structure when an employee decides to leave
- No successor for a critical role
- Missing able and willing candidates internally who may take their talents elsewhere
- Disastrous hires who damage the company's reputation and long-term growth

#### Examples

Methods to succession planning vary to suit different companies. Management guru Peter Drucker once said, "There is no success without a successor." Therefore, succession planning is essential for a successful business.

To begin succession planning, ask yourself the following questions at your next team meeting. These questions form the basis of succession planning.

- Are there people here who will retire in the next few years?
- Is anyone ready to take this position?
- How many people are in the company who alone understand certain processes in their department and are responsible for them?
- Are there difficulties or delays in production if knowledgeable employees are missing?
- What would happen if key knowledgeable employees stopped coming to work?
- If someone in the company suddenly quits for various reasons without announcing this step-in advance, would certain processes be affected or even come to a standstill?
- Would an exit mean the loss of important knowledge forever?



## How to conduct proper succession planning:

### 1. To start the succession planning process acting proactively is important

To be well prepared when a hard-to-replace team member leaves the company, it is important to have a plan for a smooth replacement. Sometimes you know well in advance when an exit is taking place, such as when someone is about to take a planned retirement. However, there can sometimes be a surprising and unforeseen transfer of employees. To be well prepared, it is necessary to look at all the key roles in your company. The following questions can be helpful:

- How does the respective position affect our company or our department in everyday life?
- How would the loss of this person in the respective position affect our business?

### 2. For successful succession planning find out possible successors

After understanding the impact of certain employees leaving, find team members who may be able to take on that position. Ask yourself the following questions:

- If we can fill this position with employees from our company, who could it be?
- Do these candidates require training? If yes, what, and how?

Look for people who have the skills necessary to succeed in a higher position, regardless of their current title. Sometimes key employees are not in the upper leadership but in support positions. Don't assume you know your employees' career goals. Make sure you look at all employees. Even if a person would be ideal for a position for you, it is possible that this person has completely different ideas about the future. Talk to employees about future career ideas and only then make a succession decision. Let them also know about your idea that they potentially step into this new position. But let them know that there is no guarantee and there can always be a change in the situation. The circumstances in the company or the circumstances of successor candidates may change for example.

### 3. Invest in professional development of succession decisions

If you have already selected possible candidates for a position, this will enable you to acquire additional knowledge and experience. Job rotation or mentoring programmes and help prepare an employee for eventual succession. Leaders have strong communication skills and interpersonal skills such as empathy and diplomacy. These competencies can be practiced before a possible change of position. In the event of early detection of potential successors, you can give employees time to acquire additional skills and experience. The most important thing is that you let them know and feel that their contributions are essential to the success of your company.

### 4. Test your succession plan

Once you have selected potential successors to take on an advanced role, do a test run of your succession planning. For example, you could give an employee responsibility to cover the role you think they could succeed whilst the current person in the role is on vacation. This will help you understand where that person will need additional training and development and the potential successor, will also get a flavour for the role and whether it suits them. Ambitious employees will continue to be motivated to work hard if they can see that they are being considered for a future promotion. This approach inevitably leads to better job retention if employees can see a clear career path within the company.

### 5. *Think of your succession planning in your hiring strategy*

Once you have identified employees as successors for key positions in your company, also think about the talent gaps that would arise if that person changed positions. This strategy can help you in your recruiting effort to find out what talent your company is lacking. Therefore, succession planning starts at the very beginning when new employees are hired. At that time, you can already start observing and coaching to find out if they are potential leadership candidates and support them with further development to fulfil that potential.

It's important to remember that the line-up of your team can change all the time. The departure of a valued employee from the company cannot always be predicted. Nonetheless, effective succession planning can pave a continuous path into the future of the company. It can help your company grow by identifying weaknesses and making plans to overcome existing and future hurdles.

### **Benefits of Offboarding in real life context: Offboarding case study: Onwelo**

Here is a glimpse of a case study from Onwelo, a modern Polish tech company. Onwelo focuses on collecting and analysing data to improve the working environment and attract the best talent. The focus is on the entire life cycle of an employee. Onwelo considers the off-boarding process as the perfect time to collect facts that will enable the Company to make improvements. Onwelo finds that exit-interview feedback is of great value, because graduates are usually more honest. With the information, the company can control processes in a targeted manner. In addition, allegations can be clarified, and the air can be cleared where necessary. It is also important that employees voluntarily agree to the interview and that it is treated with confidentiality. It must be borne in mind that not everyone finds it easy to give constructive feedback (Morawiecka, 2020).

### **Offboarding research study:**

A 2020 research study explores the relationship between the level of employee turnover and the level of engagement in the EVP [Employer Value Proposition]: preboarding, onboarding, and offboarding. They ask about the relation between the employee turnover and the level of engagement and investment during the EVP. In the study, seven semi-structured interviews were conducted with managers, employees, and workers of a multinational company. Conclusion of the study: "The engagement and investment in the three different EVP touchpoints was shown to be affected by the turnover in different ways, thus affecting the company socialisation. With a generally low staff turnover for many years, a sudden reduction in loyal employees was experienced due to retirements and resignations. This was followed by a strain on resources that already were not considered superfluous, creating a negative spiral. A considerable difference was found in the engagement between the preboarding, onboarding, and offboarding experiences of employees. The entry points were increasingly more of a priority than the exit points, with a growing imminent need for new employees. However, this also halted the efficiency of a "proper" onboarding procedure in the most afflicted departments, as it was not possible to complete the knowledge transfer and socialisation with every new employee being hired. This unintegrated approach across the company resulted in core values no longer being consistent among the workforces. Conclusively, there needs to be a consistent proactive effort to manage these EVP touchpoints and create prerequisites for a sustainable EB, especially in today's labour market" (Dedic/ Zavaher, 2020).



# CHAPTER 7:

talent4life  
personal  
development  
evaluation

# INTRODUCTION

A balanced scorecard is a strategic planning and management system, used by organisations and large corporations to look at strategic measures, in addition to traditional financial measures, to get a more “balanced” view of performance. The Talent4LIFE project has taken this traditional balanced scorecard principle and repurposed it in such a way that we can balance the views of managers and employees (the talent) in the context of retaining staff within the talent management system. The complexity of managing a company today requires that managers be able to view performance in several areas simultaneously. As we have highlighted throughout this Handbook, for successful staff retention, especially for employees 45+ years to be achieved, it is crucial that the interests and needs of the individual and those of the company are assessed, aligned, and balanced in order to satisfy the objectives of both parties.

For the purpose of the Talent4LIFE project, we have created a Personal Development Evaluation focussing on three core areas of Talent Management namely: 1. Develop, 2. Grow and 3. Retain will be accessed through the use of this tool within companies and SMEs. We have specifically chosen these three dimensions as they are integral to the retention of employees within companies as has been clearly demonstrated thus far. Businesses that invest in the development and growth of their employees and proactively seek to retain their talent are proven to be more future-proofed, agile, and responsive to the labour- and global- marketplace.

By using the Talent4LIFE Personal Development Evaluation, HR managers, line managers and business owners will be in a position to identify job-related gaps in skills and competences, enabling employees to develop according to their specific needs and that of the company. This helps companies to close skills gaps in a proactive, strategic, and inclusive manner. Hosted at <https://talent4life.eu/tool/public/>, you are invited to use and complete the Talent4LIFE Personal Development Evaluation online and then proceed to utilising the Talent4LIFE Personal Development Plan. The Talent4LIFE Personal Development Plan guides your appraisal talks and analyses each employee's individual development potential. It provides four worksheets dealing with the following aspects:

- **Step 1: Personal Development Evaluation**
  - o Answer questions concerning the perceived talents and skills of each employee from the employer's and the employee's perspective
  - o It is recommended that both parties complete the scorecard independently and then come together to review and discuss the scoring system and results under the three specific dimensions.
  - o Once the aggregated rating has been determined, the next step is to:
- **Step 2: Core Talents for further development steps**
  - o Find and define available and needed talents and agree on developing them through a guided interview
- **Step 3: Work-life-balance**
  - o Measure the work life balance of each individual employee and find ways to address it as basis for development steps
- **Step 4: Development steps and milestones**
  - o Define the actual steps to reach the development using the SMART method and set milestones and realistic review dates to ensure execution or adaptation



Together, the Talent4LIFE Personal Development Evaluation and Personal Development Plan (<https://talent4life.eu/tool/public/>) offer a robust and practical tool for SME business owners and HR professionals to use in staff retention and finding agreements and balance between influencing factors on the level of the company and the level of workers (45+). To start off, your employees and you use the Personal Development Evaluation, which gives both the chance to analyse the status quo using a traffic-light system. The employer answers a set of questions concerning the individual employee about how they perform in the dimension's development, growth, and retention. These are further broken down into criteria and statements. The employee replies to a set of corresponding statements. The system analyses the answers, calculates the results, and highlights any areas that need attention – in this case anything that is flagged red or amber by either the employer or the employee. This step thus matches the perceived talents and skills to the needed profiles and sets the groundwork for a fruitful discussion and further developments.

Following this initial stock-taking is the definition of talents for further development steps. This means, the employer and the employee set out together to define the talents that are available, needed and fit for further development of the individual employee. To achieve this result, the tool provides a set of guideline questions and a hitlist to record the talents both agree on. To facilitate the identification of the needed talents, both employee and employer receive separate guidelines on how to define talents plus an aide for the employer to write the profiles including exemplary skills in the accompanying guideline. This step results in a list of talents to develop for the employee to remain a valuable asset of the company.





TM Dimensions	Criteria	Employee Statement	Employer Statement	Employer Score (0-5)	RAG Rating	Justification for Score
DEVELOP	Fit for the role	I am confident that I have the skills, training, and knowledge to excel in my role.	Does the employee have the skills, experience, and knowledge to excel in the role?			
	Accountability	I can achieve all assigned tasks.	Do you trust the employee to complete all assigned tasks?			
	Consistent and reliable performer	I regularly produce consistent, good quality work.	Is this employee consistently productive?			
	Quality and timeliness of work	I take every opportunity available to develop my skill set.	Would the employee avail of opportunities for learning and development if presented to them?			
	Quality and timeliness of work	I deliver my work in a timely manner and to a high standard.	Is this employee producing quality work in a timely manner?			
GROW	Attitude	I am motivated and like to show initiative.	Does the employee possess the initiative required to make a positive contribution?			
	Promotability	I am ambitious and believe I have the potential to progress within the company.	Does this employee have the potential to move up in the company?			
	Ability to solve problems	I use my knowledge, skills, and ability to provide solutions independently of management.	Does this employee show good problem-solving abilities within the remit of their role?			
	Decision-making	I trust in my own abilities to make good decisions.	Is the employee capable of making decisions within their role that support the company's objectives?			
RETAIN	Collaboration	I enjoy engaging with colleagues to gain an understanding of their roles, so I can provide mutual support at all times.	Does this employee engage with colleagues in a positive way that encourages cooperation within the team?			
	Impact	I am confident that my combined talents, skills, and experience have a positive impact on the company.	Has the employee shown the capability to have a positive impact within the company, and do they have the potential to thrive in this environment?			
	Leadership	I am happy to take the lead on assignments or tasks when required.	Does this employee show good leadership qualities?			

# CONCLUSION

The Talent4LIFE Model Handbook was written against the backdrop of two key megatrends which are impacting on Europe's economy and its SMEs in particular - demographic shifts and digitalisation. For SMEs in Europe these are crucial risks for their survival since there is the need to employ workers who are able to apply digital skills in practically every economic sector, however, it is difficult to find talented younger employees within Europe. The "war for talents" has already started and when one considers the demographic challenge with an ageing workforce; the identification and hiring of new young talents is no longer the only option or solution.

One solution is to approach staff retention through active talent management and development within the company. Moreover, with companies we can also clearly see that workers aged 45+ years have managed to grow and develop, taken on more responsibility, secured senior jobs, better payment etc. but around this age their growth has somehow slowed down or stopped as they are already supervisors, line managers, fore workers etc. and there is little perceived potential for further development. Especially in SMEs there is in fact not much to offer for the best talents who are at their peak of corporate development. If businesses (and SMEs) are not able to make an appropriate offer to this target group of workers the consequences are rather dire.

The Talent4LIFE project set out in 2020 to improve the development and retention of employees with a special focus on those aged 45+ years. The Talent4LIFE Model Handbook presented here acts as a guideline on how to:

1. introduce a talent management system
2. why it is important to develop and retain staff successfully, and
3. how to enhance different areas within your company to improve talent

It highlights that implementing a talent management system is often time-consuming and requires significant effort by SMEs but is very beneficial to your company in terms of its future proofness to respond to current and future labour market challenges. Developing your employees pays off in the end and it adds value to the work they do and directly benefits your business.

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