



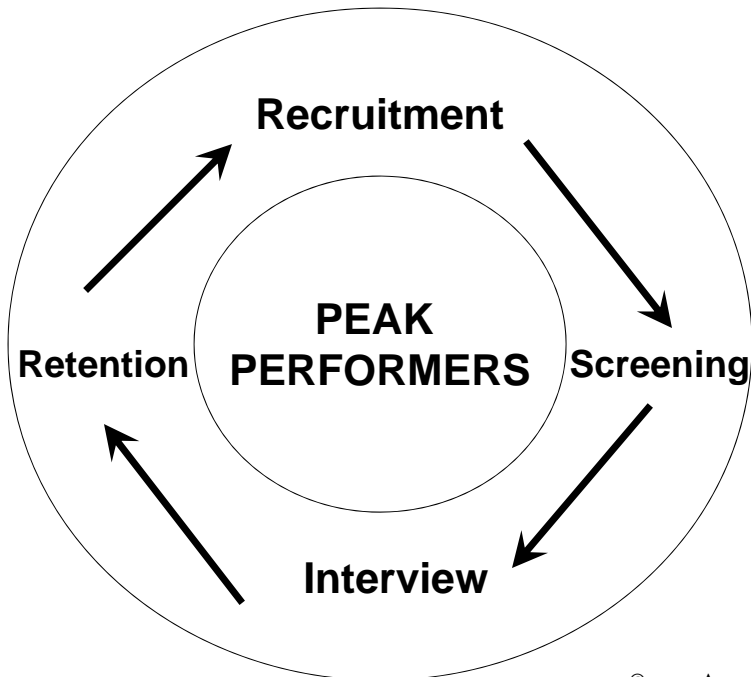
Build It and They Will Stay: Retention Strategies to Retain Top Performers



Patricia Jump, President
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COACHING APPROACH TO RETENTION

- Coaching entry-level staff
- Discipline vs. Coaching
- Invest Time to Save Time
- Respect as the Foundation
- Building your staff through confidence in their ability

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Essential Elements of Coaching

1. Relationship
2. Feedback
3. Worker's Perspective
4. Re-frame
5. Solution from Worker
6. Action & Commitment
7. Worker Accountability

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7 Fundamental Coaching Skills

1. Listen Empathetically
2. Focus on Future Behavior
3. Truth Without Blame
4. Focus On Worker's Own Solution
5. Balance Support & Accountability
6. Develop Self-Awareness
7. Model Accountability

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Coaching vs. Discipline: The Benefits

- Improve Retention
- Enhance Relationships
- Lessen Disciplinary Problems
- Encourage Worker Growth
- Teach Problem-Solving Skills
 - More Time for Coach
 - More Worker Confidence

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Managers/Directors: Strongest Link to Super Stars

- Leadership Skills for Supervisors
 - Know Risks & Causes
 - Confront Issues
 - Encourage Feedback
 - Be Fair, Not Temperamental
 - Change Direction Quickly
 - Look to Front Line
- Abolish Command & Control

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COACHING ASSESSMENT

1. Do you know why each person works for your organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No
2. Have you talked with staff directly regarding career goals?	<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Do you know their #1 career concerns?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4. Do you monitor staff for signs of fatigue or overwork and take action when needed?	<input type="checkbox"/> Yes <input type="checkbox"/> No
5. Do you have an open, trusting, respectful relationship? Have you asked them about the relationship?	<input type="checkbox"/> Yes <input type="checkbox"/> No

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COACHING ASSESSMENT

6. Do their work environments meet their personal and professional needs?	<input type="checkbox"/> Yes <input type="checkbox"/> No
7. Do their values fit those of the organization?	<input type="checkbox"/> Yes <input type="checkbox"/> No
8. Do staff seem satisfied with their work situations (assignments, colleagues, learning opportunities)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
9. Do staff know you will promote their development through projects and learning opportunities?	<input type="checkbox"/> Yes <input type="checkbox"/> No
10. Do staff know they play a critical role in your organization's reputation?	<input type="checkbox"/> Yes <input type="checkbox"/> No

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Top Reasons Super Stars Leave

1. The job or workplace is not as expected
2. The mismatch between the job and the person
3. Too little coaching and feedback
4. Too few growth opportunities
5. Feeling devalued and unrecognized
6. Stress from overwork and work-life imbalance
7. Loss of trust and confidence in senior leaders

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Orientation

- Starting Time
- Comprehensive Understanding
- Career Discussion
- Expectation Review
- Relationships
- OJT

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“Soft” Skill Development

- An Investment
- Retention Strategy
- Positive Bottom Line
- Business Promotion

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MENTORING

A developmental, caring, sharing and helping relationship where one person invests time, know-how, and effort in enhancing another person's growth, knowledge and skills. Responding to critical needs in the life of another in ways that prepare them for greater productivity or achievement in the future (Gordon Shea)

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Mentoring For Keeps

- Why bother?
- Risks
- Formal Program
 - Pilot test
- Partnership
- Planning
- Goals

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MENTORING SUCCESS STORY

- Turnover
- Job Satisfaction
- Diverse Populations

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Fundamental Qualities of Leaders

- Sacrifice
- Let Leader Lead
- Contribute Best
- Compromise
- Try New Things
- Work TOGETHER

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Working Together Means...

- “Connectedness” Encouraged
- Failure Tolerated
- Communication Obligatory
- Together Frequently
- Direction = Better
- Excellence Rewarded
- Boundaries Set & Respected

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Strengthen Trust

- Position of Trust
- Consistency
- Listen With Open Mind
- Admit Mistakes
- Give Credit

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CONSTRUCTIVE FEEDBACK

- Definition
- Goal
- Includes the “important”
- Backfires if not used correctly
- Takes time to learn to give and to receive

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Claiming the Future through Constructive Feedback: The Win-Win Approach

- Give in Private
- Watch Tone of Voice
- Balance the Scale
- Focus on Problem, NOT Person
 - Be Specific
- Give Close to the Event
- Use Questions, not Statements
- Stick to One Subject
- Show Respect

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RECEIVING CONSTRUCTIVE FEEDBACK

- Welcome it
- Listen to it
- Maintain Eye Contact and Open Body Language
- Stay Calm, Hear the Person Out
- Avoid Excuses
- Say “Thank You”
- Restate Issue to Clarify
- View as Problem Solving, Not Attack
- Find Own Solutions

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GIVING EFFECTIVE PRAISE

- Know Your Common Goal
- Catch in the Act of “Doing it Right”
- Be Immediate
- Be Specific
- Be Silent
- End with Encouragement

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RECIPE FOR RETENTION

- Reality
- Balance
- Train Forever
- Excellent Leaders
- Communication Skills
- Listen
- Know Why Staff Leave
- Know Why Staff Stay
- Know What You Can Do
- Show You Care

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Pay/Retention Connection

- Take complaints about pay seriously
- Stay within market pay levels
- Examine merit pay
- Evaluate current pay systems with respect to the strength of pay-per-formance relationships
- Examine whether executive pay is moving in the same direction and at roughly proportionate rates, as employee increases
- Reward the soul and the wallet

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Communication/Retention Connection

- Inner Honor
- Dismiss EGO
- High Self-Esteem
- Emotional Intelligence
- Social Intelligence
- Approach Behavior
- Stop – Get Low - Speak

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Create Successful Workers

- Reduce Complexity and Reduce Stress
 - Ask Staff
- Give the Inside Scoop on Communication
 - Maintenance – talk to them in the hall, on the fly
 - Manager – make an appointment
- Measure satisfaction regularly and take action accordingly

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Why RETENTION?

- Cost of Turnover
 - Dollars
 - Quality
 - Satisfaction
- Worker Shortage

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Caring Company Culture

THANK GOODNESS IT'S
MONDAY

- Believe in Staff
- No Guilt
- You Work for Them
- Respect
- Hand Picked
- Silent Gratitude
- Measure Culture
- Fun at Work

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Career Paths

- Decision
 - Good At
 - Enjoy
- Goals
- Evaluate
- Assess
- Strengthen
- Act

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MYTHS OF COMMITMENT

- Committed Stay
- Results Immediate
- Absenteeism/Turnover
- Not As Committed
- Leave for Money
- Something Better Than Nothing
- Decisions Made Suddenly
- Low Turnover is Bad
- Ask Departing Employees
- Changes Imply Commitment

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Commitment Realities

- Must “Fit”
- Fun Counts
- Feel Welcomed
- Money Value
- Hire Right
- Career Guidance
- Trust
- Personal Life
- Commitment is Fragile
- Communication
- Hidden Reasons

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Predicting Departure

- Exit Interviews
- Current Interviews
- Recognize the Signs of Departure
 - Absenteeism
 - Increased reports of problems
 - Increased turnover cycle
 - Increased job dissatisfaction comments

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Re-Recruit Inside Talent

- Solicit Input
- Coach
- Prime Motivators
- Embrace Differences
- “I Quit My Manager”

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COACH YOURSELF

- Be a Voracious Learner
- Focus on “Doing” for Others
- Work Hard Every Day
- Take Vacations
- Improve Listening
- Stay in Touch With Personal Priorities
- Model Integrity
- Take Care of “Me, Inc.”

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Formal Retention Plan

- Examine & Train Leadership
- Teach Coaching vs. Discipline
- Know Each Staff & Individualize Retention Strategies
- Train for Excellence
- Re-Recruit Your Best Talent

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Acorn's End Resources

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- OASIS Training
- Recruiting & Retaining Peak Performers Video & Audio tapes
- "Boundaries & You Video
- Mentorship Implementation Manual
 - A step-by-step instruction manual
- HIPAA Training Videos
- Medicare Documentation Training Manual
- Medicare Mock Survey Tool for Home Care
- Minnesota Mock Survey for Home Care & for Assisted Living
- OASIS Quarterly Audit Tool for Home Care
- Home Care Policy and Procedure Manual

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SOLVING THE GENERATIONAL PUZZLE

More than 60% of employers say they are experiencing tension between employees from different generations

Generation	Avoiding & Resolving Performance Issues Through Understanding
Veterans (1922 1943)	<ol style="list-style-type: none"> 1. May not be comfortable with technology 2. Keep scheduling flexible 3. Create knowledge transfer programs where your oldest and most experienced employees can be honored and rewarded for sharing their wisdom 4. Seek input 5. Remember “please” & “thank you” & avoid profanity 6. Use clear enunciation and grammar 7. Establish rapport with them individually 8. Be patient with learning curve 9. Meet with them regularly to provide rigorous feedback, problem-solve, trouble-shoot, and provide resources. 10. Ask them to create standard operating procedures for every one of their tasks and responsibilities with clear, concise, step-by-step directions. 11. Create a "go-to" list of experts that younger workers can contact when they need wisdom on a customer, client, process, project, or procedure. 12. Formalize job shadowing, cross training, and job sharing opportunities and allow them to work with younger generations 13. They thrive on standard operating procedures---written and verbal
Baby Boomers (1943 1960)	<ol style="list-style-type: none"> 1. Emphasize relational culture of company – caring, compassion 2. Ask, don't tell 3. Place a high priority on career advancement opportunities 4. Publicly acknowledge and reward Boomers for expertise and special contributions. 5. Identify talented workers who are nearing retirement and help them redefine retirement so their skills and talents stay with you for as long as possible 6. Encourage those in leadership positions to identify and develop high potential employees to take over leadership roles as necessary.

Generation	Avoiding & Resolving Performance Issues Through Understanding
Generation Xers (1960- 1980)	<ol style="list-style-type: none"> 1. Little value placed on longevity – value ideas and experience 2. Like relaxed environment 3. Want to move around – find ways within the company for them to move 4. Love thinking outside the box (creative problem solving) 5. Provide learning opportunities, relationship opportunities, creative challenges, financial rewards, and work-life balance 6. Provide access to internet and keep technology current 7. Want frequent, constructive feedback and coaching. 8. Seek increased status, authority, prestige, and rewards. 9. Okay with being pushed to accept more responsibility and then recognized or that growth and development. 10. Offer opportunities to develop marketable skills, guidance to help them advance their careers, and flexibility with schedules, assignments, locations, and choices of coworkers 11. Help build one-on-one loyalty relationships with coaching-style managers, decision-makers, and wise mentors who can offer them the kind of learning not available from other sources 12. Will stay with a job as long as they feel challenged, heard and rewarded. 13. Expect themselves and others to get up to speed quickly and produce results (break job into bite-size chunks so they can see day-to-day results)
Generation Y (1980- 2000)	<ol style="list-style-type: none"> 1. Want constant feedback, coaching and recognition 2. Need high-tech environment 3. Want own performance to control financial/non-financial compensation 4. Relate to “task” oriented work - create a clear picture of what you want. Need small goals, tight deadlines to build up ownership of tasks 5. Provide with hands-on coaching, direction, and support every step of the way. Make their on-the-job learning dynamic and personal. Help them work faster and better. Repeat and clarify expectations on a regular basis. 6. Want to be assigned an older mentor 7. Aim to work faster and better than other workers. 8. Want fair direct managers - highly engaged in professional development. 9. Seek out creative challenges and view colleagues as vast resources from whom to gain knowledge. 10. Want to make an important impact on Day 1. 11. Thrive in an environment where creativity and independent thinking are looked upon as a positive – they are independent and tech savvy. 12. Want jobs with flexibility, telecommuting options and the ability to go part time or leave the workforce temporarily when children are in the picture. 13. Listen. Ask about their aspirations. Show them you care about their success 14. They are fiercely loyal to managers that are knowledgeable, caring coaches that can mentor them to achieve their goals.

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COST OF TURNOVER WORKSHEET

All too often, providers use only the "direct" obvious costs when determining what it costs to lose an employee. A more accurate turnover cost is calculated when using both the "direct" and the "indirect" costs.

ACTUAL COSTS

- | | |
|---------------------------------------------------|----------|
| 1. Continued benefits | \$ _____ |
| 2. Separation pay/accrued vacation | \$ _____ |
| 3. New employee criminal checks, reference checks | \$ _____ |
| 4. New employee medical exams, vaccinations etc. | \$ _____ |
| 5. Temporary/contract employees | \$ _____ |

HIDDEN COSTS

(Appropriate salary/hour x time spent on activities)

- | | |
|--------------------------------------------------------------------------------------------------|----------|
| 1. Administrative cost to process separation
(Process benefits, payroll, exit interview etc.) | \$ _____ |
| 2. Departing employee cost
(Non-productive time for exit interview, transition meetings etc.) | \$ _____ |
| 3. Lower productivity: peers, supervisors, subordinates | \$ _____ |
| 4. Advertising and recruiting fees | \$ _____ |
| 5. Advertising creation and placement | \$ _____ |
| 6. Resume screening | \$ _____ |
| 7. Interview & selection time (count all involved) | \$ _____ |
| 8. Interview expenses
(Meals, mileage, other) | \$ _____ |
| 9. Loss of client admissions | \$ _____ |
| 10. Decrease in visits and/or client services | \$ _____ |
| 11. New employee orientation to job (non-productive x) | \$ _____ |
| 12. Training time with other staff (count all involved) | \$ _____ |
| 13. Training material for new employee | \$ _____ |
| 14. Informal one-on-one training | \$ _____ |
| 15. Loss of organization knowledge (departing employee) | \$ _____ |
| 16. Lower morale due to overwork | \$ _____ |
| 17. Errors due to overwork | \$ _____ |
| 18. Learning curve
(New employee + others taking over as interim workers) | \$ _____ |
| 19. Client issues related to turnover | \$ _____ |
| 20. Loss of client relationships/satisfaction | \$ _____ |
| 21. Disrupted organizational operations | \$ _____ |
| 22. Chain reaction turnover | \$ _____ |
| 23. Others not listed | \$ _____ |

TOTAL REPLACEMENT COST \$ _____

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WORKPLACE ASSESSMENT

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
5	4	3	2	1

1. I know what is expected of me at work	5	4	3	2	1
2. I have the materials, training and resources I need to do my job well	5	4	3	2	1
3. The majority of the time at work, I am doing something I enjoy	5	4	3	2	1
4. In the last week, I have received recognition or praise for my work	5	4	3	2	1
5. My supervisor knows my personal goals and my career goals	5	4	3	2	1
6. At work, my opinions count	5	4	3	2	1
7. I receive feedback at least every three months regarding my work	5	4	3	2	1
8. The people at work make me feel my job is important	5	4	3	2	1
9. I have someone at work who encourages my development to become a better worker	5	4	3	2	1
10. While I don't always agree with my supervisor, I do have respect for him/her	5	4	3	2	1
11. I am given opportunities at work to learn and to grow	5	4	3	2	1
12. I am provided services through work that help me balance my job and my family	5	4	3	2	1

Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
5	4	3	2	1

13. I am likely to be working here two years from now	5	4	3	2	1
14. I feel like part of the "family" at my work	5	4	3	2	1
15. I am proud to work for this company	5	4	3	2	1
16. I feel a strong personal attachment to this company	5	4	3	2	1
17. Clients can rely on this company to receive outstanding quality service	5	4	3	2	1
18. This company cares about me and invests in my success	5	4	3	2	1
19. This company attracts and keeps outstanding employees	5	4	3	2	1
20. The people here communicate openly and honestly	5	4	3	2	1
21. The people at this company listen well and respond quickly to feedback	5	4	3	2	1
22. I would like to see my relationship with the company grow in the future	5	4	3	2	1
23. I understand the values and principles that guide this company's leadership	5	4	3	2	1
24. I understand the goals of the company and the role I play in meeting those goals	5	4	3	2	1
25. I trust the company leaders to behave with fairness and integrity	5	4	3	2	1
26. Employee loyalty is appropriately valued and rewarded at this company	5	4	3	2	1

Top 10 Strategies to Avoid and Resolve Performance Issues

1. Use a Coaching Approach to Discipline
 - Use Respect as the Foundation
 - Building your staff through confidence in their ability
 - Apply Essential Elements of Coaching
 - 1) Build Relationships
 - 2) Give Constant Feedback
 - 3) Get the Worker's Perspective
 - 4) Re-frame the Issue if You and Worker Disagree
 - 5) Get Solutions from Worker**
 - 6) Set up Action Plan & Commitment to a Next Meeting Time
 - 7) Hold Worker Accountability
 - Learn and Apply 7 Fundamental Coaching Skills
 - 1) Listen Empathetically
 - 2) Focus on Future Behavior (Say what you WANT to see)
 - 3) State the Truth without Blame
 - 4) Focus on Worker's Own Solution**
 - 5) Balance Support & Accountability
 - 6) Develop Self-Awareness (how do others perceive you?)
 - 7) Model Accountability
2. Learn to Give Constructive Feedback
 - Give in Private; Watch Tone of Voice; Balance the Scale; Focus on Problem, NOT Person; Be Specific; Give Close to the Event; Use Questions, not Statements; Stick to One Subject; Show Respect
3. Learn to Receive Constructive Feedback
 - Welcome it; Listen to it; Maintain Eye Contact and Open Body Language; Stay Calm, Hear the Person Out; Avoid Excuses; Say "Thank You;" Restate Issue to Clarify; View as Problem Solving, Not Attack; Find Own Solutions
4. Know the Workplace Environment to Discourage Poor Performance and Encourage Creative Resolutions
 - Reality, Balance, Train Forever, Excellent Leaders, Communication Skills, Listening Skills, Know Why Staff Leave, Know Why Staff Stay, Know What You Can Do To Help, Show You Care)
 - Conduct regular review of workplace environment
 - [See WORKPLACE ASSESSMENT FORM](#)
5. Know Top Reasons for Discontentment & Performance Issues
 - The job or workplace is not as expected
 - The mismatch between the job and the person
 - Too little coaching and feedback
 - Too few growth opportunities
 - Feeling devalued and unrecognized
 - Stress from overwork and work-life imbalance
 - Loss of trust and confidence in senior leaders

Caregiver Performance Issues & Resolutions
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- Lack of understanding between generations ([see GENERATIONAL PUZZLE FORM](#))
- 6. Train for Excellence Before the Issues Arise
 - Orientation – Provide Comprehensive Understanding
 - 1) Have a Career Discussion (at ALL levels of the Organization)
 - 2) Conduct an Expectation Review
 - 3) Make Sure They Meet Key Members of the Organization – Build Relationships
 - Provide On—the Job-Training (assign a mentor)
 - “Soft” Skill Development – train extensively
- 7. Establish a Mentoring Program
 - Use formal program
 - Pilot test for at least six months
 - Train Mentors and Mentees
 - Handpick Mentors
- 8. Monitor, Train & Build Your Managers - Your Strongest Link to Direct Care Worker
 - Provide Training on Leadership Skills (and make sure leaders are competent)
 - 1) Know Risks & Causes of Performance Issues
 - 2) Confront Issues – deal with the bad apples
 - 3) Train managers about the connection between performance issues and high turnover as well as the cost of turnover ([See COST OF TURNOVER WORKSHEET](#))
 - 4) Encourage Feedback (including about yourself as the leader)
 - 5) Be Fair, Not Temperamental
 - 6) Change Direction Quickly
 - 7) **Look to Front Line for Solutions**
 - 8) Abolish Command & Control Method
- 9. Insist on Fundamental Qualities of Leaders
 - Complete self-evaluation ([See LEADER SELF-TEST FORM](#))
 - Willing to Sacrifice – Leave own agenda off the table
 - Contribute His/Her Best – ALWAYS (nothing withheld)
 - Willing to Compromise
 - Willing to Try New Things
 - Work TOGETHER
- 10. Re-Recruit Inside Talent to Enhance Ongoing Performance Excellence
 - A. Solicit Input
 - B. Coach Regularly
 - C. Know Individual's Prime Motivators
 - D. Embrace Differences
 - E. Keep Pay Current Compared to New Hires

* **BONUS TIP** - Coach Yourself (Be a Voracious Learner; Focus on “Doing” for Others; Work Hard Every Day; Take Vacations; Improve Listening; Stay in Touch With Personal Priorities; Model Integrity)