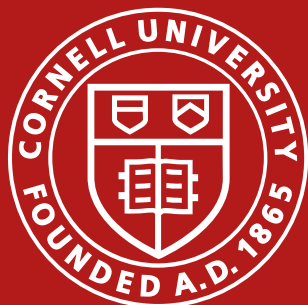




Engagement & Retention Conversations

A TOOLKIT FOR PEOPLE MANAGERS



What are Engagement and Retention Conversations?

Private, individualized conversations where a manager can learn more about what does/does not engage and motivate each member of their team. These conversations may help provide insight into an employees' intention to remain in their current role, their thoughts about seeking a new opportunity and the timing of these plans. Managers can ask questions to identify what is most important to each employee, where an employee may be struggling or feeling frustrated, and use this information to determine how best to best support each individual employee.

These are valuable to:

- Build trust by actively listening to and connecting with employees as individuals
- Gain insights to maximize individual productivity
- Increase communication
- Obtain valuable and actionable information you can leverage to make positive changes in your department
- Proactively collect information that can help prevent regrettable turnover



Preparing for the Conversation:

- Schedule meetings for a minimum of 30 mins with each of your employees. It may be helpful to spread them out over a few weeks to allow you time to process and regroup between meetings.
- Share why you are meeting and what to expect (see [Appendix A](#) and [Appendix B](#))
- Plan how you're going to use the information gathered so you can communicate next steps during the meeting wrap-up
- Agree on a mutually comfortable conversation location
- Select 3-5 open ended questions you would like to ask each employee ([Appendix C](#), re: questions)
- Practice asking the questions before the meeting to increase your comfort level

Note: Please plan to schedule conversations with new hires within the first 90 days of hire.

Having a Successful Conversation

- Always start the conversation by asking how your employee is doing
- Listen without judgment
- Be flexible in your thinking (no automatic no's)
- Avoid becoming defensive, you are seeking first to understand so you'll need to remove your ego from the conversation
- Take notes ([Appendix D](#))
- Ask probing follow up questions to learn more ([Appendix E](#))
- If you don't have the answer to a question, be honest about it and commit to getting the information and following back up with your employee
- Summarize what you heard before wrapping up
- Share next steps
- Thank your employee for their time and honesty



Next Steps

- Review your notes to identify common themes & potential responsibility swaps
- Follow-up with others who may be able to offer resources, suggestions or options (i.e., your manager, your HR Rep)
- Make tentative decisions
- Put your ideas in writing
- Schedule a follow up meeting with each employee to share and discuss your initial plan. Ask for employee input and adjust where applicable
- Mutually agree on next steps
- Communicate this will be a continuous team process
- Revisit how things are going during regularly scheduled 1:1 meetings
- Schedule future conversations as needed

Please contact Maria Wolff, mw284@cornell.edu with any questions regarding this process.

Appendix

Appendix A: Engagement & Retention Conversation Concept – A Customizable Script

Example Script:

Thank you for all the work you do for (enter department name). I know this has been a challenging last couple of years and I thought it would be a good time to connect with each of you to see how you are doing. It's important to me that I do all I can to create a positive work experience, so I'd like to get a better understanding of what you each like most about working here, what motivates you to do your best every day and what I can do to make it an even better experience for you.

During the next few weeks, I'll be scheduling 1:1 meetings with each of you to discuss your experience and to hear more about what is working for you and what might need some attention.

Please let me know if you have any questions about these meetings. I look forward to connecting with each of you and hearing about your thoughts and experiences.

Note: Sharing the concept of Retention and Engagement conversations during an all staff meeting where everyone will be hearing about it directly from you can be a good way to introduce the topic to your direct reports.





Engagement & Retention Conversation Fact Sheet for Employees

What is an engagement & retention conversation and what is the purpose?

An engagement & retention conversation is a 1:1 meeting with your direct supervisor focusing on what's important to you, what do you value and enjoy about working at Cornell, and what may contribute to your thinking about possibly leaving.

What happens during the conversation?

Your supervisor will ask questions related to how things are going and what they can do to make working at Cornell a positive and rewarding experience for you.

How should you prepare?

Ask yourself the following questions to help prepare:

- What do I appreciate most about my current position? What do I like least?
- On a day-to-day basis, does my current position meet my needs?
- On a broader scale, does my position meet my needs for achieving my career aspirations?
- What challenges or concerns am I experiencing?
- How can my supervisor help address those challenges and concerns?
- If I change one thing about my job that would make me happier – what would it be?

What may come up during the conversation?

- Workload (e.g., amount, autonomy and challenge)
- Career (e.g., career aspirations and development opportunities)
- Work environment (e.g., workspace location and wellbeing)
- Access to information (e.g., feedback and recognition preferences)
- Access to necessary resources (e.g., tools and equipment)
- Work relationships (e.g., interactions with your supervisor and co-workers)

What will happen after my engagement & retention conversation?

After meeting with you, your supervisor will evaluate and determine what changes they can make to help address the issues you discussed. Keep in mind, your supervisor may not be able to create your perfect job, but they will make a sincere effort to maintain or increase your job satisfaction. Once your manager has developed a draft plan, they will schedule a follow up conversation so you can mutually review it and agree on any next steps.

Appendix C: Engagement & Retention Questions

Below are sample questions you can ask during your conversation to obtain meaningful information from your employee. Choose 3 or more questions you think will be most relevant for understanding your team's individual experience and needs. Be prepared to adjust your questions based on each employee's responses and displayed level of comfort.

Engagement & Retention Questions

Motivation & Engagement

- What made you decide to become a (insert position title)?
- What do you look forward to when you start the workday?
- What aspects of your job do you find most frustrating?
- What part of your job do you wish you didn't have to do?
- What skills and talents would you like to use more often?
- In an ideal world, what would you be working on right now?

Work Environment

- What do you like most about working on our team?
- What do you think about our culture gets in the way of our success?
- Is this a better department to work in now compared to 6 months ago? Why?
- Do you have the tools and resources to do your job well? If not, what is missing? (workplace set up, ergonomics, technology, skills, time, etc.)
- Do you view your co-workers as friends, acquaintances, or strangers? What makes you feel that way?
- If you were in my role, what is the first thing you would change in our department?

Manager Effectiveness

- What's one thing I do that you find helpful?
- What's one thing I do that irritates or frustrates you?
- What's one thing you recommend I START doing?
- What's something positive I do that I could be doing a lot more?
- Tell me about a situation you felt I did a good job managing.
- Tell me about a situation you wish I had handled differently.

Career Aspirations

- What professional or career-related opportunities are you most excited about pursuing?
- Are there specific roles in the university you would like to learn more about?
- What knowledge and skills do you need to get to the next stage of your career?
- What would you like to be doing 2 years from now?
- As your manager, what's one thing I can do to help you achieve your career goals?

Growth and Development

- What is more important – mastering and excelling in your current role or growing in other areas?
- What skills do you want to learn this year?
- Who in the organization would you like to learn from? What do you want to learn from them?
- As your manager, how can I best support your growth and development?

Wellbeing

- How are you doing.....really?
- How has your wellbeing been impacted by the pandemic and national events over the past two years?
- Have your professional and/or personal goals evolved as a result of these events? How so?
- On a scale of 1-10, how fulfilled are you by your work? How important is feeling fulfilled to you?
- When is the last time you had a day off? When is your next day off scheduled?
- As your manager, what can I do to support your wellbeing?

Retention

- What makes you want to stay on our team?
- What would make you listen to a call from a recruiter?
- If you could change one thing about your job, what would it be?
- What would a nightmare workday look like to you?
- What would a perfect workday look like to you?

Appendix D: Notes Template

Name:

Likes	Dislikes	Items to Follow Up On
Interested In	Not Interested In	Next Steps

Appendix E: Probing Follow Up Questions

These open ended questions were designed for you to gain more clarity and insights in your conversations.

Why	What	How	Miscellaneous
<p>Why do you think that is?</p> <p>Why do you feel that way?</p> <p>Why do you think that happens?</p>	<p>What kind of impact do you think that would have?</p> <p>What would need to change for you to accomplish this?</p> <p>What do you think the root of the problem is?</p> <p>What is the connection between these two things?</p> <p>What seems to be working well? Why?</p> <p>What indicators are you looking at to see if things are on or off track?</p>	<p>How would you feel if that happened?</p> <p>How would you like to proceed?</p> <p>How is this impacting you, your work or your relationship with colleagues?</p> <p>How are you handling X (specific thing)?</p> <p>How is this impacting you as a whole person?</p>	<p>Is this issue unique to our department?</p> <p>Is there anything else you would like to add to that last statement?</p> <p>Can you help me understand what x means to you?</p> <p>When you say x, I'm picturing ABC, how do you see it?</p> <p>Can you share more about your thinking? What else are you considering?</p> <p>Of all the potential approaches to deal with this, which do you think would be the most effective?</p>

