

INTRODUCTION

About This Program

This Trainer's Toolkit for *Love 'Em or Lose 'Em: Employee Retention* provides you with the tools to teach managers about the A-Z approach of retaining good employees. These tools will be explained in detail and incorporated into the three exercises provided in this guide. Your participants will leave with the knowledge and ability to become the kind of managers who retain valuable employees.

The video program, *Love 'Em or Lose 'Em: Employee Retention*, is designed to increase the awareness of the important role managers play in retaining their star employees. The video program depicts typical manager/employee situations. After watching the video, participants will have a better understanding of why good employees leave, why they stay and what they can do to keep their best employees. This video is 22 minutes long and can easily be stopped for discussion between segments.

This Leader's Guide is part of the Trainer's Toolkit for *Love 'Em or Lose 'Em: Employee Retention* and is based on the book, *Love 'Em or Lose 'Em: Getting Good People to Stay* by Beverly Kaye and Sharon Jordan-Evans. It is designed to help you conduct a thorough training session on managing employees by following the A-Z approach. This Leader's Guide will assist you in using the video program in many different ways, giving your organization the flexibility to determine which training format is best for its specific needs. Overhead transparencies are provided with this training package to assist you in the presentation of this material.

Illustrated desk references are available for use with this program. These references may be given to managers as a helpful resource tool for future referral.

We recommend that you tailor the program to your organization's needs by including specific information unique to your employees' working conditions. The facilitation of this course can be easily modified to suit your needs.

Training Materials

There are a few things you will need for an effective training session:

- A training room located away from major distractions or interruptions
- A comfortable arrangement of chairs and tables, preferably in a circular pattern with an opening for the TV monitor and other visual aids, that can accommodate the audience. Be certain all participants can easily see the viewing screen and each other so they can exchange ideas.
- Adequate lighting that can be adjusted while viewing the video
- A location from which the trainer/speaker can lead discussions — possibly including a podium and/or flip chart
- The training video *Love 'Em or Lose 'Em: Employee Retention*
- TV/VCR with remote
- A copy of the class agenda for each participant that includes discussion topics, break times, etc.
- A desk reference and pencil for each participant
- A flip chart or dry-erase board and appropriate markers
- A computer with PowerPoint software and a projector for showing the PowerPoint Presentation included on the Leader's Guide CD
- An overhead projector, transparencies and transparency markers
- Other useful visual aids
- Copies of the Self-Assessment (See page 5).

Preparation

Preparation is the key to effective training. There are several things you need to do prior to the session:

Invite Participants

Send out letters or memos to participants or post a notice two weeks in advance of the training date. (Sample included on page 6). State location of meeting, date, time and agenda. Distribute Self-Assessments to attendees and ask that they complete and return them to you before the scheduled training session or bring them to the session.

Goals

Define the goals of this presentation. Goals should coincide with the particular needs of your organization and reflect the content of this video. Here are some examples of goals:

- Understand that retention is a serious and costly issue
- Understand what it takes to keep employees and why they leave
- Understand that the “buck stops with the manager”
- Understand that retaining good employees is as simple as A-Z.

Determining the overall goals in advance helps you identify the approach to take for the training session. Each goal could require a slightly different presentation. It is also important to decide what level of proficiency is expected from participants upon completion of the training.

Objectives

Determine objectives for the training session based on your defined goal(s). Write out your objectives clearly. Here are some examples of objectives:

- The learner will be able to identify the primary reasons why employee retention is so important to managers and employers today.
- The learner will be able to identify top factors, in addition to pay, cited by workers for staying with an employer.
- The learner will be able to explain why the manager is a key factor in employee retention.
- The learner will be able to identify typical behaviors of good and bad managers.
- The learner will be able to identify the questions a manager should ask before it's too late and employees leave.
- The learner will identify things a manager can do to improve his/her own performance.

Audience

Another aspect to consider in planning this training session is the audience. Tailor your presentation to the needs of your participants. The focus of your discussion and the depth of content presented may vary depending on whether you are providing an orientation for new managers or a refresher course for experienced managers.

All managers (and their employees) within the organization will benefit from the *Love 'Em or Lose 'Em: Employee Retention* training program. Employee retention skills are essential for the ultimate success of your organization. These important skills can reduce company recruiting expenditures by keeping valuable employees on staff. The employee retention skills learned in this program will lead to greater employee job satisfaction, which will greatly enhance company productivity.

The training group size should range from 10 to 20 people. Most of the exercises in this program require that the group break into two smaller groups in order to increase participation. When the group is too large, individual attention may be lost.

Retention Self-Assessment

Please answer truthfully. No one except you will know how you answered.

	Please circle one choice per question.			
	Never	Tried Once	1x Month	1x Week
1. How often do you ask your employees what keeps them at your organization?	1	2	3	4
2. How often do you ask your employees what a competitor might offer them that would make them leave?	1	2	3	4
3. How often do you personally speak with your employees (other than managers)?	1	2	3	4
4. How often do you “bend the rules” to accommodate an individual employee’s needs?	1	2	3	4
5. How often do you show your appreciation by thanking employees for a job well done?	1	2	3	4
6. How often do you ask your employees about their career aspirations?	1	2	3	4
7. How often do you give honest feedback to an employee to let them know about their performance?	1	2	3	4
8. How often do you directly support your employees’ attempts to balance work and family life?	1	2	3	4
9. How often do you ask your employees for feedback on your management performance?	1	2	3	4
10. Do you believe that you as a manager can affect employee retention?	___ Yes ___ No Comment:			
11. Do you feel empowered by your company to do things to retain employees?	___ Yes ___ No Comment:			
12. Are you afraid to ask employees what will keep them because you will not be able to offer it?	___ Yes ___ No Comment:			
13. Do you feel that employee morale and retention issues are something someone else (like HR) should handle?	___ Yes ___ No Comment:			
14. How often do you initiate or take part in activities that promote fun and creativity in the workplace?	1	2	3	4
15. How often do you provide opportunities that will challenge your best employees (i.e., allow for greater decision-making responsibilities)?	1	2	3	4
16. How often do you help employees identify ways to incorporate their passions into their work?	1	2	3	4
17. How often do you ask employees for their (constructive) solutions to problems within their division or the company?	1	2	3	4

TOTALS

Now add up your scores. No one will know this but you. Your score is: _____.

If you scored between 50 and 60 — You must be the best manager in the world! You may want to consider becoming a trainer and writing a book.

If you scored between 40 - 50 — You’re great to work with and truly value your employees.

If you scored between 30 - 40 — You probably waste a lot of money training new employees!

If you scored between 0 and 30 — You’ll want to attend this training class regularly!

Comments:

Sample Invitation

Date: September 3, 2003

To: Managers

From: Sue Wilcox, Human Resources

Re: Managers Training Session

How do you keep your best people from walking out the door?

We have a great session planned that will explain why employees leave and what you can do to get them to stay. We will cover the A-Z approach of employee retention that features key steps for improving manager and employee relationships.

Please plan to be at the training session on September 17, at 2:00 p.m. We will be meeting in the main conference room for a three-hour session. If for some reason you are unable to attend, please contact me at 731-8788 as soon as possible.

Goals of the training session:

- Understand that retention is a serious and costly issue
- Understand what it takes to keep employees and why they leave
- Understand that the “buck stops with the manager”
- Understand that retaining good employees is as simple as A-Z.

Agenda:

- | | |
|-------------------|-------------|
| • Introduction | 2:00 - 2:25 |
| • Video | 2:25 - 2:55 |
| • Exercise 1 | 2:55 - 3:15 |
| • Exercise 2 | 3:15 - 3:35 |
| • Break | 3:35 - 3:55 |
| • Exercise 3 | 3:55 - 4:35 |
| • Session Summary | 4:35 - 5:00 |

We look forward to seeing you on September 17, 2003.

Presentaion Tips

Overcoming anxiety

The best way to overcome anxiety about speaking before a group is to be prepared. Although it's natural to feel nervous, your sweaty palms will disappear once you focus on what you are saying.

The importance of retaining your employees is one of the most important topics you'll teach, and you want everyone to understand and benefit from the training. Therefore, concentrate on what you want people to understand, and your presentation will flow naturally. You'll forget you were ever nervous in the first place.

Choosing your vocabulary

Don't lose your audience by using words that are too sophisticated. It's better to use language that you would use when speaking to each person individually.

Getting rid of the "umms"

One of the most annoying mistakes a speaker makes is saying "umm" every time there is a break between thoughts. To avoid this, just don't do it. Remain silent while you think about what you're going to say next. The silence is really not that long, so don't worry that it may weaken your presentation. You'll even gain credibility because the audience will perceive you as being more in control.

Controlling the speed and tone of your voice

You'll put your audience to sleep if you speak too slowly, and they won't be able to keep up with the content if you speak too quickly. Approximately 150 words per minute is the best speed. If speaking too slowly doesn't put your audience to sleep, a monotonous tone will surely do it. Vary your tone often, especially when making a particular point. Adding emotion to your presentation will keep your audience involved. Again, speak to your audience as if you're having a conversation with each person individually.

Sticking to the schedule

Begin class on time and restart the session promptly at the end of each break. Explain that, except for emergencies, messages will be taken for participants during the sessions and will be distributed to them at the start of each break.

Asking for questions

Ask for questions throughout the session. Be prepared to answer all types of questions, but don't be worried if you don't know the answer. Simply say, "I'm not sure of the answer, but I'll find out and get back to you." Then, after class, make sure you do find the answer to that question and give it to the person who asked.

TRAINING SESSION OVERVIEW

The Self-Assessment

Self-Assessments are informative tools which can help you customize your training sessions by focusing on the needs of your audience. If you do not see the assessments in advance of the training, they still serve an important purpose by giving participants an opportunity to reflect on the subject before they attend the training. Another option is to administer the Self-Assessment at the start of the training session, then review participants' responses during the first break, to determine what portions of the training you will want to emphasize.

Presentation Outline

Introduce yourself and the training session. Welcome the participants, and offer a brief explanation of the purpose of the session. Use PowerPoint® Slide #2 to introduce the training session. These are the top factors, in addition to pay, cited by workers for staying with an employer:

1. Career growth, learning and development
2. Exciting and challenging work
3. Meaningful work that makes a difference and a contribution

Have participants introduce themselves.

Set the stage for a positive learning experience by including your students in the introduction. Use an "ice breaker" to relax the class. You may want to use the Introduction Exercises on page 10. Ask the participants to discuss problems they have encountered in retaining their good employees. Explain your expectations of the discussion and encourage students to participate in the discussion by asking pertinent questions, giving opinions and offering examples.

Start the video.

Pause the video, as appropriate, to emphasize a point or discuss a practical application in your organization. You may want to practice pausing the video in order to freeze images on the screen that have a significant meaning; or you may choose to wait until the end of the video for discussion.

Discussion Topics and Exercises

If you choose to view the entire video first, follow the video with a short, 10-minute discussion. You can choose any combination of PowerPoint® Slides/handouts provided in this guide for your discussion. Four exercises are provided for use after the discussion. Refer to the agenda to determine which exercises you have scheduled in your training session.

Sample Agenda

2-Hour Session Agenda

INTRODUCTION	25 MINUTES
VIDEO & DISCUSSION	30 MINUTES
EXERCISE 1	20 MINUTES
EXERCISE 2	20 MINUTES
CONCLUSION	25 MINUTES

3-Hour Session Agenda

INTRODUCTION	25 MINUTES
VIDEO & DISCUSSION	30 MINUTES
EXERCISE 1	20 MINUTES
EXERCISE 2	20 MINUTES
BREAK	20 MINUTES
EXERCISE 3 or EXERCISE 4	40 MINUTES
CONCLUSION	25 MINUTES

INTRODUCTION EXERCISES

Icebreaker #1

Materials: Notepads and pens

Time: 10-15 Minutes

Purpose: To get managers thinking about the issue of “retention.”

Ask participants to turn to the person on their left and interview each other by asking the following three questions:

1. What is your name?

2. What is one thing your co-workers don't know about you?

3. What word do you think of when you hear the word “retention”?

Ask participants to volunteer their word associations to the word “retention.”

Icebreaker #2

Time: 10 Minutes

Materials: 4 large sheets of paper or 3X5 cards, markers

Purpose: To help participants develop an awareness of their managerial strengths and weaknesses.

- Before the session: Tape four large sheets of paper around the room. On one sheet write the heading, “What I want to learn about employee retention.” On another, write the heading, “My weaknesses as a manager.” On the third, write, “My strengths as a manager.” And on the fourth, write, “First name of employees I wish to retain.”
- At the beginning of the session, ask participants to contribute to each sheet of paper on the wall.
- At the end of the training session, close by reminding participants that an awareness of their strengths and weaknesses can help them learn how to retain their best employees.



EXERCISES

Exercise 1

Time: 10-20 Minutes

Materials: Notepads, pens, flipchart and markers

Purpose: To focus attention and stimulate discussion on the topic of employee retention.

- Directly after viewing the video, ask participants to break into small groups of two to four people to discuss the different scenarios in the video. Each group should discuss:
 - Which scenario could you identify with?
 - What retention step would you like to learn more about?
 - How would that retention step be helpful to you in your particular situation?
 - Bring the groups back together and discuss each group's findings.
 - Record the responses:



Exercise 2

TIME: 35 Minutes

MATERIALS: Notepads and pens

PURPOSE: To help managers understand the value of showing appreciation and respect.

- Break into two groups. (In groups of 10 or fewer this can be done with the entire group together.) Ask each group to role-play the following scenario.

- Scenario

Bob has an impeccable reputation in his firm for delivering high-quality work ahead of schedule. He was chosen to be a team leader on an important project. This was an opportunity for which he had been waiting. He worked three months on the project, including working overtime and some Saturdays, receiving no extra pay. Senior management had high expectations for the project and looked forward to the sales opportunities. As team leader, Bob presented the product to senior management in a morning meeting. After the presentation, the room was quiet. Two questions were asked about technical aspects of the project. Then the meeting was adjourned. Following this meeting, Bob met with his team to report the outcome.

- After the role-play, participants will return to their group to discuss the scenario and to share their own experiences as they relate to the importance of showing appreciation. Discuss your personal experience with hard work that went unrecognized. How did it make you feel?

- Further points of discussion

Bob's efforts and the efforts of his team were not recognized or appreciated. What could senior management have said and done that would have made a difference? How does this kind of treatment affect the loyalty of a valuable employee like Bob?

Exercise 3

TIME: 20-40 Minutes

MATERIALS: Notepads, pens, flipchart and markers

PURPOSE: To practice developing career conversation questions and to explore career opportunities with employees.

- Using the case study on the overhead, ask participants to break into two teams. Team #1 will construct career conversation questions that Cindy's manager could ask. Team #2 will brainstorm ways to help Cindy realize her career goals.

Remind the group that career conversation questions are simply those which help an employee become more aware of their unique talents and interests. They also help employees focus on achievement of future goals

- Bring the teams together to discuss the types of questions they would ask and career opportunity ideas they developed.
- As a final exercise, ask a participant from each team to role-play both "Cindy" and her "manager" as they ask the career questions brainstormed by Team #1, and come up with a plan to get Cindy moving toward her career goals.
- Time permitting, discuss the role-play.

Exercise 4

TIME: 35 Minutes

MATERIALS: Notepads and pens

PURPOSE: To practice asking employees what they need from their jobs.

- Break into pairs. Decide who will play the manager and who will play the employee. Role-play either the scenario provided below or play yourself in your own role as either manager or employee. If you choose the latter option, consider the setting in which you are located as you approach your employee.

- Explain the scenario to the group:

Cathy is a manager with an engineering firm. She has recently lost a couple of key people and wants to retain the employees remaining on staff. Cathy will start her retention efforts by asking her good employees what keeps them on the job. During the morning coffee break, Cathy decides to approach Greg in the lunchroom and initiates a conversation.

* Managers should begin the discussion and ask the questions: What will keep you working here? What would cause you to leave?

- After the role-play, discuss:
 - How it felt to be in each role
 - How the surroundings affected the conversation — i.e., is there a “good” place to ASK for employee feedback and to initiate career conversations?
 - The individual responses, particularly those which participants found surprising!

SESSION SUMMARY

TIME: 25 minutes

Summarize

One summarizing technique is to review the basic principles of employee retention. Another technique is to ask each class participant to highlight what was learned from the training session. Ask the participants if they have any final questions.

Evaluation

Distribute the evaluation form (located on page 18) to each participant. When each participant hands in the evaluation to you, thank him or her for attending the training session.

EVALUATION FORM

Please circle your rating for each statement.

Ratings: 1=NA, 2= Needs Improvement, 3=Satisfactory, 4=Very Good, 5=Excellent

Subject:

The material was informative:	1	2	3	4	5
The information was interesting:	1	2	3	4	5
The material was easy to understand:	1	2	3	4	5

Training Program:

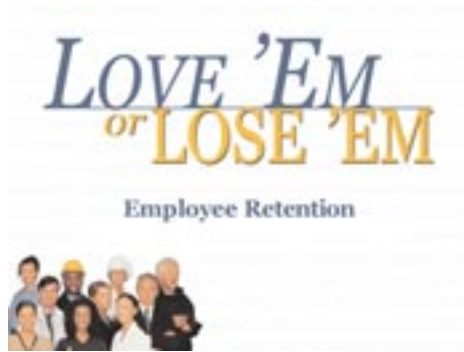
The exercises as a learning tool were:	1	2	3	4	5
The use of the program as a learning tool was:	1	2	3	4	5
The program provided real-life examples:	1	2	3	4	5

Trainer:

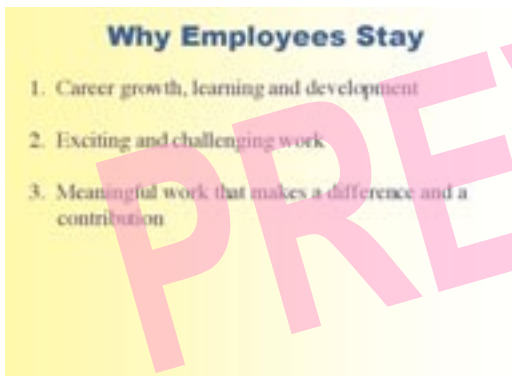
Trainer's presentation of information:	1	2	3	4	5
Trainer's level of knowledge:	1	2	3	4	5
Trainer's ability to facilitate discussion:	1	2	3	4	5

Additional Comments:

POWERPOINT PRESENTATION OVERVIEW



Slide #1 Title

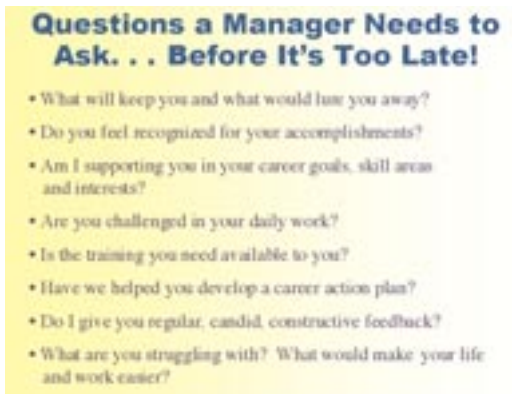


Slide #2

PREVIEW



Slide #3



Slide #4

POWERPOINT PRESENTATION OVERVIEW Continued

Employee Retention Begins and Ends With Managers

- Managers need to be asking employees: What would keep you? What would make you go?
- Managers must mentor and challenge.
- Managers need to identify and encourage career growth and development.
- Managers must assign meaningful work that makes a difference and contribution.
- Managers need to recognize and appreciate.
- Managers must support a work/family balance.

Slide #5

What you can do . . .

- Find ways to encourage humor and fun.
- Maintain awareness of current key retention factors and your competitors' employment strategies.
- Find opportunities regularly to ASK your employees about what their career ambitions are.
- Initiate training and educational opportunities for your employees.
- Be aware of work/life balance within your organization and begin to ask your employees about work/family issues they are facing.
- Be willing to bend rules to support employees' individual needs.

Slide #6

Case Study

Cindy is your department secretary. She is bright, dependable and hard working. In her last performance review, Cindy hinted that she would like an opportunity to move up within the company. Cindy has an associate's degree and company policy requires a bachelor's degree for all junior-level positions. How would you help satisfy Cindy's desire to advance within your organization?

Slide #7

Love 'Em or Lose 'Em

The A-Z Approach For Getting Good People To Stay

- | | |
|--------------------------|--------------------------------|
| AME: What Keeps You? | NUMBERS: Run Them |
| BUCK: It Keeps Here | OPPORTUNITIES: Show Them |
| CAREERS: Support Growth | PAMPER: Encourage It |
| CRISITY: Show Respect | QUESTION: Reconsider the Rules |
| ENJOY: Energize the Job | REWARD: Provide Recognition |
| FAMILY: Get Friendly | SPACE: Give It |
| GOALS: Expand Options | TRUTH: Tell It |
| HERE: Fix It | UNDERSTAND: Listen Deeply |
| INFORMATION: Show It | VALUES: Define and Align |
| JOKES: Don't Be One | WELLNESS: Sustain It |
| KICKS: Get Some | WAYS: Handle With Care |
| LENS: Create Connections | YIELD: Power Down |
| MENTOR: Be One | ZENITH: Go for It |

Slide #8

POWERPOINT PRESENTATION OVERVIEW Continued

Love 'Em or Lose 'Em
The A-Z Approach For Getting Good People To Stay

ASK: What Keeps You?	NUMBERS: Run Them
BUCK: It Stops Here	OPPORTUNITIES: Show Them
CAREERS: Support Growth	PASSION: Encourage It
COURTY: Show Respect	QUESTION: Reconsider the Rules
ENERGY: Energize the Job	REWARD: Provide Recognition
FAMILY: Get Friendly	SPACE: Give It
GOALS: Expand Options	TRUTH: Tell It
HERE: Fit It In	UNDERSTAND: Listen Deeper
INFORMATION: Share It	VALUES: Define and Align
IRK: Don't Be One	WELLNESS: Sustain It
KICKS: Get Some	X-act: Handle With Care
LEAD: Create Connections	YIELD: Power Down
MENTOR: Be One	ZENITH: Go for It

Slide #9

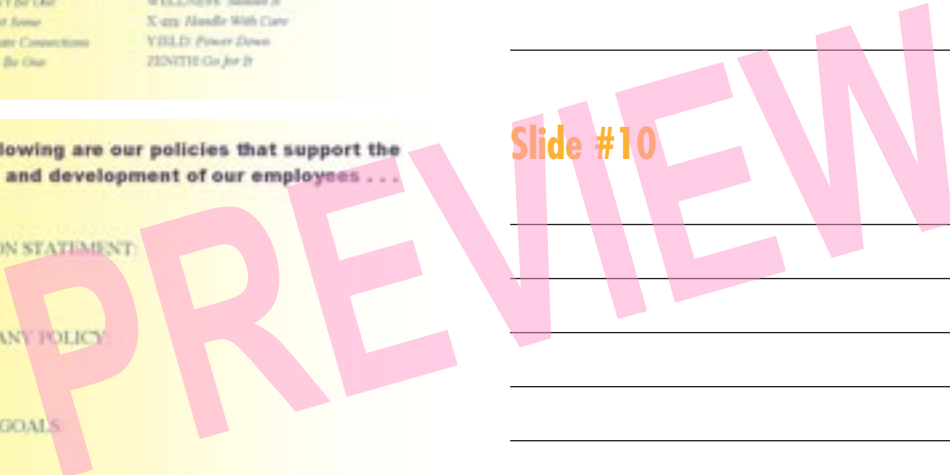
The following are our policies that support the growth and development of our employees . . .

MISSION STATEMENT:

COMPANY POLICY:

TEAM GOALS:

Slide #10



Customizing a PowerPoint® Presentation

The PowerPoint® presentations included on the Coastal CD and DVD products are customizable when used on a computer loaded with Microsoft® PowerPoint software. (Note: In the following instructions, “click” implies a click with your left mouse button. If a “right” click is necessary, it will be so indicated.) Microsoft® PowerPoint has many features. The following steps will help you customize our presentations quickly. To customize a presentation:

1. If the “Customizable Version” icon is displayed on the landing screen, click on this option. If this option is not available, click on the PowerPoint presentation to open it. Save this presentation to another location, such as your hard drive or a folder on the network. You will make your customizations on the saved version.

To add, copy, hide or remove a slide, or to change the order of the slides in the presentation:

2. Click on “View” on the menu bar.
3. Click on “Slide Sorter” from the “View” menu. Or, under the “Normal” view, you may use the “Outline” on the left side of the screen.
4. To add a slide, place your cursor in front of the slide where you want to add a slide. Click on “Insert” on the menu bar. Then, click on “New Slide” on the “Insert” menu. Or, click on the “New Slide” tool on the tool bar. Choose a slide format to fit your desired content, and follow the prompts given.
5. Sometimes it’s easier to copy a slide, and then change the content of the slide than to create a new one. To copy a slide, click on the original slide. Click on “Edit” on the menu bar, and choose “Duplicate.” A new copy will be created to the right of the original slide. Or, click on “Edit” on your menu bar, and choose “Copy.” You may then “Paste” the slide wherever you want it to appear.
6. To hide a slide from your presentation, but to keep it for future use, right click on the slide you wish to hide, and choose “Hide Slide” from the menu. Or, click on the “Hide Slide” tool on the tool bar.
7. To remove a slide from the presentation, click on the slide you want to remove. Click on “Edit” on the menu bar. Then, click on “Delete Slide” on the “Edit” menu. Or, click on the slide, and press the “Delete” key on your keyboard.
8. To change the order of the slides in the presentation, click on the slide to be moved and while holding the mouse button depressed, drag the slide to its new location. Release your mouse button to place the slide.

If you wish to change or remove the animation effect as you move from slide to slide:

1. Double click on the slide you want to change the animated transition on.
2. Double click on the text box of the slide. A border and white handles appear around the text box.
3. Click on “Slide Show” on the menu bar. Then, click on “Preset Animation.” To turn off the effects, choose “Off.” If you wish to change the effect, there are many options to consider.

To edit content of any slide:

1. Double click on the slide you want to change the content of.
2. Double click on the text box of the slide. A border and white handles appear around the text box.
3. Type the desired changes.

Remember to save any changes made to your presentation!

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This leader's guide is one of a series of print materials, video, interactive CD-ROM, Web-based and DVD programs produced by Coastal Training Technologies Corporation. Each product is the result of painstaking analysis, design, development and production by the instructional designers and technical specialists on our staff.

Our catalog is constantly being revised and expanded, so we would appreciate any comments on current titles or suggestions for future ones. For further information on any Coastal product, or to receive a free catalog, call Coastal Training Technologies Corp. (Virginia Beach, VA) at 800-285-9107 or send a FAX to 757-498-8820. Visit us on the Web at www.coastal.com.

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