Retention
White Paper

Building Loyalty and Commitment in the Workplace

Global Organizations Share Engagement and Retention Practices
In This Report

Partial List of Participants

- Bench International
- Bulgari Corporation of America
- Burger King Corporation
- Canadian Department of Fisheries & Oceans
- Cognos Incorporated
- HealthFirst
- Intel Corporation
- JPMorganChase
- Michelin North America
- MTV Networks
- PacifiCorp
- Pfizer
- The Food Group
- United Airlines
- U.S. Patent and Trademark Office
- Volvo Cars of North America
- Wells Fargo Bank

“Disengaged employees are the psychological casualties of talent mismanagement; employees who leave are the physical casualties.”

1

Introduction

4

Key Findings and Best Practices

15

Conclusion

Note: The quotes that appear throughout this document were collected from participants.
How do you build a culture that engages and retains talent in a changing economy? How can you foster loyalty and commitment in your workplace?

Introduction

For several years a group of global talent leaders have been meeting in Los Angeles to discuss issues of talent retention and engagement. Their conversations have centered around not just hanging on to talented people, but about fully engaging them as well.

Career Systems International, a leader in talent management solutions, and Beverly Kaye and Sharon Jordan-Evans, co-authors of the best-sellers *Love 'Em or Lose 'Em: Getting Good People to Stay* and *Love It, Don't Leave It: 26 Ways to Get What You Want at Work*, hosted these events. The goal was to provide a forum for talent leaders to discuss, debate, benchmark and collaborate on the timely topic of engaging and retaining talent.

This report summarizes the key findings and best practices of these practice leaders, and provides “food for thought” for others facing similar issues.

Background and Current Reality

These leaders redefined engagement and retention. *They described engagement as capturing employees’ minds and hearts at each stage of their work lives.* To be fully engaged requires emotional involvement in the work, leading to increased productivity, higher customer satisfaction, and greater profits. Engaged employees bring value to organizations, improve the organization’s competitive position and reap personal rewards from the work they do. Their engagement, commitment and loyalty are a result of being challenged, appreciated, heard and respected.

Interestingly, according to a Gallup 2001 study, only one quarter of employees are engaged (see inset).

Disengaged employees are the psychological casualties of talent mismanagement; employees who leave are the physical casualties. Both drain the organization of the brainpower and commitment that is vital to ensuring productivity and profitability.

The participating talent leaders agreed that the term employee retention has acquired new meaning or, perhaps, new importance during recent economic
turmoil. They used business survival language to describe what retention means to their organizations: mission critical, direct impact on customer satisfaction, financial impacts and correlation to revenues, productivity, ability to bring technology forward, affecting time to market. A Towers Perrin study of senior executives corroborated this point of view. It revealed that finding and keeping talent are critical elements of an organization’s ability to:

- Improve profitability
- Manage costs
- Grow m² acquisition
- Innovate
- Develop new products/services
- Create e-commerce sales solutions
- Uncover new markets

Clearly, only a talent-focused culture can successfully compete in these areas. Every one of these business strategies requires keeping talent engaged and on the team.

The Importance of Engagement and Retention Today

Some people think the “heat is off” and that leaders, human resources professionals and line leaders can relax. Unemployment is up, compared to two years ago. People are just happy to have a job, right? Not so fast. A Towers Perrin Report shows that at least some managers are keeping their eyes on the retention dilemma.

### Managers believe they will continue to struggle to attract, retain and engage talent.

*Given the changes in the economy over the past several months...*

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Is it more or less difficult to motivate and engage employees?

“The vast majority of manager respondents (88% in US and 91% in Canada) believe that, compared with more favorable economic times less than a year ago, it is now just as difficult or more difficult to attract and retain talented employees. Even more, 92%, believe it is as difficult or more difficult to engage and motivate employees.”

*The Towers Perrin Talent Report*

Participants at the Retention Convention agree that engagement and retention remain spotlight issues – for several reasons:

- **There are not enough “good” workers to go around.** The U.S. Bureau of Labor Statistics predicts a shortage of 10 million workers in the United States by 2010.

- **Workers’ attitudes and expectations have shifted – permanently.** Blind loyalty to an organization is a thing of the past. Employees may show devotion, but only if it is earned, and fewer than half of today’s employees believe their companies have earned their loyalty. Towers Perrin reports that 56% of today’s workforce is open to moving on.

- **New employment options lure the best and the brightest.** The free-agent movement is proving to be an attractive alternative to today’s workers: 26% of today’s workforce operates as temporary or contract
Building Loyalty and Commitment in the Workplace

workers and, by 2010, this number is projected to grow to a startling 41%.

- **Finding a new job has seldom been easier.** Even in a slow economy, job options not only abound for skilled workers, but also are easier to find and pursue in the Internet age (with 9:00 to 5:00 being the most popular log-on time).

- **The cost of losing talent is high, no matter what the economic conditions.** On average, the costs to replace talent can reach upwards of two times annual salary, not including the indirect costs of lost knowledge, declining morale, lost customers and rising inefficiencies.

- **In times of uncertainty, the risks for losing top talent, physically and psychologically, are especially high.** Following downsizing, survivors (typically the best and the brightest) begin to flow out the door 6 to 12 months later. And some of those that do not physically leave make a psychological departure – they’re no longer engaged.

- **In the new economy, talent is a key differentiator.** In a global marketplace driven by ideas, where information freely flows, brainpower remains the source of competitive advantage.

**Other retention challenges** identified by the talent leaders included:

- Increased competition for talent from other organizations
- An aging workforce and growing numbers of pending retirements
- Key skills and experience lost through turnover
- Lack of qualified applicants
- Difficulty recruiting for remote locations
- Stress from mergers and takeovers
- Heavy workload

**So, How To Keep Them?**

A key baseline for the Convention’s discussion was provided by viewing a report on Career Systems’ research about why people stay in an organization. The findings from the ongoing “What Kept You?” survey support what many other studies and what the participating talent leaders themselves have found: there is no real mystery about what keeps good people in their organizations. The key factors include: challenge, exciting work, career growth, development, a good boss, working with great people and, of course, fair pay. The mystery lies in how to apply this knowledge in today’s fast-paced, competitive work environments (see inset).

**Note:** Many found it interesting that these retention drivers had not substantially changed between 1998 and 2002, despite drastic U.S. economic and labor market shifts.

The leading drivers for keeping talent, based on Career Systems’ on-going “What Kept You” survey of over 16,000 individuals across 35 different industries, in order of response frequency are:

- Exciting Work & Challenge
- Career Growth, Learning & Development
- Working with Great People & Relationships
- Fair Pay
- Supportive Management/ Great Boss
- Being Recognized, Valued, & Respected
- Benefits
- Meaningful Work, Making a Difference and Contribution
- Pride in Organization, its Mission, & Product
- Great Work Environment/Culture
The current realities were discussed, both engagement and retention were defined, and the talent leaders formed panels to share key findings and best practices. Eighteen of those ideas are summarized here. (See inset for list.) Some are short and may seem basic, but could provide a simple reminder of something you already know, but haven’t been doing. Other results are more complex or may represent innovative thinking. Any of these could spark your own creativity and help you build or strengthen an engagement and retention culture in your organization.

**Key Findings and Best Practices**

1. **Reciprocity is Key**
   
   Employees are investors in the company and expect a return on investment. Without it, they leave.

   “Retention is based on the concept of reciprocity. If you create the kind of environment your people want to work in, they will deliver. If they are ignored, they can undermine and hurt overall productivity. Employees actually have the power to fire the boss — simply by delivering weak performance and low productivity.”
Retention Must be Part of the Organization DNA

Organizations that successfully retain and engage their talent have woven retention and engagement deeply into their structure. They do not treat retention as another event to focus on when time permits, nor stamp it onto an already message-laden culture, but instead strive to make retention a part of their organization's DNA.

One participant experienced a devastating reduction in business in one geographic region attributed to talent turnover. Turnover became turnaround through a manager-focused initiative that:

- required managers to have the “Ask” conversation (ask what will keep employees and what might entice them away)
- required each unit to select a retention strategy and implement it
- required managers to submit weekly reports about their retention activities

While developing managers into retention-focused leaders, this organization developed a reward program for the retention-focused managers. “If you can get managers to coach and develop, you lay the foundation for a retention-focused culture.”

Loyalty is Never a Given

Even satisfied employees sometimes leave. Great leaders have more power and influence to build loyalty in an organization. Loyalty is earned, not a given.

Some participants shared their belief that earning employee loyalty begins during orientation. One organization has found that today’s new first-time employees, unlike the Baby Boomers, do not sign on solely based on the organization’s great history. This organization seeks to build loyalty among employees from the moment they accept the job offer. Their new hire program focuses on three approaches:

- Seek great job fit. Utilizing an e-staffing approach, this organization relies on competency-matching and requires the involvement of line leaders in the job interviews. Early in the relationship, they explore the employee's basic needs to affirm and reinforce the factors that attracted them to the position in the first place.
- Train early and consistently. This organization consistently trains talent (especially in their customer service areas) and, at regular intervals, evaluates job fit.
- Hold managers accountable. Have managers build development plans with each employee, staying focused on “why they came.” Managers have scorecards; part of their bonus is based on their success in not only reducing turnover, but keeping employees engaged as well.

“To really succeed today, employees need a real ‘loyalty hook’. Cradle to grave initiatives are critical to creating a successful retention-focused culture.”
Treating the first year as the beginning of the retention cycle and focusing on an effective on-boarding process is a large part of another organization’s retention and loyalty-building strategy. Their attention to on-boarding has played a major role in the organization-wide attrition rate being below 4%, with an even lower rate among new hires.

The organization has implemented a comprehensive, year-long new hire program scripted right down to what the employee will be doing on Day 1 through Day 5, then monthly throughout the first year. The on-boarding process concludes with the employee celebrating his first anniversary with supervisors, HR and the leadership team.

An in-depth introduction to the culture weaves the new employee into the organization’s fabric early and effectively. The firm’s first, and continuing, handshake engages the employee and builds the relationship that extends the bond over time. The organization has increased its ability to lure the best and the brightest with its comprehensive orientation program. As the “Why They Came” is converted into “Why They Stay”, this development focused organization is building a strong talent pipeline by investing in building loyalty and commitment at the beginning of the new hire process.

Organizations Must be Seen as Employers of Choice

One participant organization, aiming to be viewed as the employer of choice in a highly competitive technology market, developed a strategy to create an extraordinary environment for all employees. They believed that if they have to compete on compensation and benefits, they would WIN on culture and learning/development. They fashioned their Talent Relationship Management system after a Customer Relationship Management model, and are shifting from a paternalistic environment to a partnership environment, where everyone has a role in the engagement equation. The genius of their culture shift is in viewing employees now as investors, not as assets. What was once a manager-driven culture is now a partnership-driven culture, where everyone has an opportunity to receive a return on his or her investment.

“A good retention and engagement-focused question for candidates and employees: Is our organization’s mission important to you?”

“Managers can connect early to foster a more productive, motivated and committed workforce by having powerful conversations directed at Relationship, Focus, Passion, Challenge, Balance, and Intention.”
Mergers, Downsizing and Bankruptcies Require Leaders to Re-motivate Employees, Both During and After the Crisis

One financial services’ participant stressed that keeping the survivors engaged after a layoff is vital to productivity. These survivors are wounded and hurt to the point that, if not attended to, they may be unable to effectively contribute to organizational goals. A participating executive search firm defined this as the “fear factor” (roughly translated as “Am I next?”). A key ingredient to disengagement of talent during transitional periods, this fear opens the talent theft doors to competitors. Layoffs can have a direct affect on customer service, as key contacts are laid off and surviving employees disengage.

To combat these effects, one organization assigned senior level mentors to hi-potentials and asked them to take these preventive steps:

- Give information before the change
- Give information during the change about what’s going on
- Give assurance that they’re safe
- Provide them a direct link to someone, other than their boss, at a higher level

The organization was able to breed engagement by keeping its stars well-linked internally, especially during change. And by partnering hi-potentials with a more senior person than their own boss they became more firmly anchored in the transitioning organization.

During a recent financial services’ mega-merger, the new organization first looked at turnover rates and conducted a 360° feedback process. Their efforts then focused on creating a comprehensive Talent Management Process with an organization-wide diversity emphasis. A formal succession planning program was implemented with key contributors working hand-in-hand with potential replacements. They were able to begin to measure performance and develop talent in the widest possible population. They found that focusing on diversity had a direct affect on employee retention and commitment, thus minimizing the risk of losing those merger survivors.

Another organization finalized their merger and realized that they hadn’t focused on employees during the process. To respond to employee dissatisfaction, they created an HR Positive Workplace initiative to re-weave the cultural fabric, beginning with employee orientation. Formal manager accountability measurements were also implemented.
Stars Include More Than Just the Top 10%—or 1%!

One participant shared the realization that the often-ignored 99% of employees, the staff making $5 to $8 an hour, are most often directly responsible for customer satisfaction—or lack of satisfaction. Turnover rates reaching 400% among this population created an incredible customer satisfaction challenge.

These talent leaders began their retention intervention by asking their 30-year veteran employees why they stayed. The answers drove the decision to initiate a retention culture change throughout the organization. Managers learned retention strategies, then hired for attitude and trained for success.

Stars are people at any level who bring value to the organization. A good test to identify stars is to consider this hypothetical question: If you were leaving and could take anyone with you to build your new team, whom would you take? Those people are your stars.

Participants reported that focusing only on the top 10% of performers and ignoring the rest is a costly error, especially considering the effect of turnover on customer service. It’s often those solid citizens, those in the middle, that are responsible for servicing the customers. Poor customer service will eventually affect shareholder value.

High-Potentials Must Be Carefully Managed

Keeping high-potential talent is vital to competitiveness, and many employers are frustrated to see their high flyers as willing victims of talent theft. One participant’s experience was that while managers often talk about high potentials, they rarely talk to them—about their potential. Instead of mapping out the employee’s development plan, managers are likely to pile on the work and raise expectations without telling the employee why. The obvious happens—uninformed high potentials feel they not only are carrying the weight of the lower performers but also feel they are being taken advantage of. Frustrated talent, unfulfilled at work, will listen (and talk) to anyone. If managers focus on retaining and engaging this vital talent pool, their high-potentials are less likely to take the headhunters’ calls.

A Recovering Economy Spells Choice

While pundits debate whether we’ve had a recession, how long it has lasted, whether it’s over and who came out on top, employees are still uncertain and lack trust. Even people who didn’t make job security a priority before are now weighing job opportunities with security-focused eyes. Suddenly they want to know how safe the pension fund is, how safe the building is and who provides the organization’s accounting services.

“We’re seizing the economic downturn to build the strategy and change the culture, to convince employees we believe they’re the best and we want to keep them.”

The key to this organization’s success has been broadening their definition of a “star.”
As the economy recovers, talented people will be even more in demand, and will have greater choices. Some participant organizations have taken advantage of the slow recovery to create an environment that will retain and engage their employees. They are repositioning the organization as the employer of choice and are staffing up to meet the demands of a recovered economy. They agree with the Towers Perrin findings (inset, page 3) that, as the recovery approaches, talent will be harder to find and even harder to engage.

**Return to Basics**

When another participating organization sought to reduce a 26% turnover rate, it returned to basics, relying on the principles that built its success. The founding documents, containing core values that were 15 years old, were resurrected from the vault. From those foundational beliefs, they developed **Seven Commandments**, two of which focus specifically on nurturing talent and commitment:

- “We believe that mutual respect, trust, professional growth, team spirit and lively environment are the building blocks of our organization culture.”
- “We believe that everyone can contribute to the achievement of the organization’s mission through personal involvement, personal responsibility and personal commitment.”

A re-definition of core values is the context for this organization’s new focus on selecting, assessing, validating and communicating with its talent.

Another customer-service-focused organization *returned to basics* by reminding all employees that taking care of *internal customers* ultimately enriches service to *external customers*. They view engagement initiatives as efforts to increase motivation and build commitment, which promotes operational performance improvement and ultimately impacts profitability.

They have focused on leadership skills, role definition, supervisor effectiveness, recognition, information, processes, enhancing skills, seeking and seizing opportunities and building teamwork. They have subsequently found and measured higher ratings in customer satisfaction and have built a more reliable team.

**Each Generation Has Different Reasons For Staying**

All agreed that engaging talent is critical—across generations and throughout diverse cultures. For the first time in modern history, there are four generations working side-by-side in most companies. To succeed we need to understand and engage them all.

Generational differences are one of the greatest engagement challenges facing employers today. Many are unaware of the issues or unclear about how to effectively work with these differences. Employers

“*The golden rule is now obsolete and has been replaced with the “platinum” rule – do unto others and treat others the way THEY want to be treated.*”

“It’s tested, it’s measured, and it works!”
need to recognize different motivators, communication styles and work values and define, individually, what might encourage talented people to stay (at least for a little while longer). Each generational cohort defines loyalty differently, so retention and engagement strategies have to be customized to meet their diverse needs.

“One participant described an organizational approach with their employees, who have an average age of 26. This organization focuses on career development, signaling to employees from their first day that they’ll be able to develop career paths and options, without leaving the organization. Creative mentoring programs and empowered managers who help shape careers combine to develop a retention culture for this notably transient age group. This organization recognizes a direct link between learning and retention, so they create career mobility inside the organization rather than maintaining a structure that encourages moving on to be able to grow.

Make Diversity an Engagement and Retention Opportunity

A global financial services corporation has chosen diversity as its engagement focus. It chose to weave 10 key (A-Z) retention and engagement strategies into its diversity initiative. This organization asks managers what they have done to develop each person on their team. Believing that diversity drives employee engagement and commitment, its initiatives include: a Corporate Diversity Council; a Diversity Scorecard for managers and supervisors; a Minority Vendor Program; and mandatory semi-annual diversity reviews with the CEO and Corporate Diversity Council. One of the more successful diversity initiatives has been a reverse mentoring process, pairing the mostly-white male senior managers with African-American and female partners.

Mentor Widely—and in Both Directions

Mentoring is the engagement focus of a participating industry leader. This organization created a 12-month mentoring program driven by an application process

“The case for mentoring in organizations is now more compelling than ever. A direct link to creating an organization’s talent pipeline, it also supports retention, development and engagement of today’s workforce. Leaders need to be educated quickly so they see mentoring as a positive experience rather than a burden.”
Building Loyalty and Commitment in the Workplace

for both mentors and mentees. Both partners in the learning relationship are held responsible for its success. Mentors and mentees alike are reporting personal benefits while the organization experiences enhanced communication, increased levels of employee engagement, strengthened leadership, and an opportunity to identify and develop individuals needed for bench strength.

Another organization with a large aging workforce provides mentoring up for those in the most senior positions. This process is opening communication lines and creating development opportunities for the senior mentees as well as the younger mentors.

Train Intelligently

Ongoing training in manageable bites is a banking corporation’s approach to engagement. This employer sees engagement and retention as an ongoing, continuous effort and finds ways to size the retention plan to the demographics of the organization. This means taking the time to secure buy-in from the top, providing information and expectations, and delivering training in manageable chunks over time, rather than all at once. They’ve empowered managers to eliminate poor hires and are rewarding retention-focused managers. Consistently applying all facets of retention, they are seeing results.

Coach for the Long View

Coaching with a long view is a forte of one participating organization. Using a unique process, they have appointed a team to look at talent needs 15 years into the future. These full-time internal coaches (senior level appointments) identify and develop a distinct cadre/cohort of talent within the organization to meet the long-term needs of the enterprise.

“Career development is the right thing for the organization (identifying and developing future leaders), the right thing for the employee (creating a development environment), and a key retention component.”

Create a Development Culture

A chance to learn and grow is a high-ranking reason that people choose to stay with an organization. Capitalizing on that fact, one participating organization sought to retain its 10,000 diverse employees without placing the development burden entirely on managers. Their development program includes:

- An employee development center with learning stations
- A web-based career development tool kit
- A mentoring program in which both parties are responsible for success
- An Employee Development Assignment Program to support career development among employees at all levels by developing highly skilled leaders
- Career Fact Sheets, posters and multi-purpose displays to promote career development

© Beverly Kaye, Sharon Jordan-Evans and Career Systems International
In the process, the organization is developing managers to improve their own employee retention skills with ample training and resources to support their efforts.

Another participating organization faced a very different development challenge. Turnover had never been a problem in its long history, but they discovered that a very high percentage of their employees were nearing retirement age. They needed to retain and build on their senior employees’ knowledge base while they built rungs in the ladder for a large crop of rising managers. Their “Zen career management” program responded to the challenge. Their approach is remarkable for its long-range vision and relative independence of managers to support the long-term goals of the organization.

Recognize Managers Who Keep Employees

Meaningful recognition remains a potent energizer for employees and managers alike. Managers at one participating organization know that their feet are held to the fire, but the fire is an objective yardstick that gives specific weight to particular retention skills. Using employee satisfaction surveys measured alongside customer service scores, bonuses are incrementally awarded based on improvement. Other organizations have established a progressive reward system, rewarding improvements in turnover even if retention goals are missed.

Cultivate the Internal Headhunter Profile

Two executives from Bench International, an executive search firm, were invited to “tell it like it is.” They shared with the participants that their “head-hunting” tactics are not much different than what good managers should do. In fact, they are called in when good managers don’t do what they should! Here’s what they said they do:

- Ask questions.
- Listen and understand.
- Respect people/preserve their dignity.
- Value people.
- Offer choices.
- Offer counsel and mentoring.
- Provide a picture of what opportunities exist.
- Link people to good work environments.

Bench International’s Urban Head-Hunting Realities

- We can’t take what isn’t handed to us.
- People leave at or about the threshold of pain.
- People leave when they feel invisible.
- People leave when they are “mad as hell, and just can’t take it anymore.”

Managers who do these things within an organization create an environment where employees aren’t compelled to seek opportunities outside the enterprise. When employers integrate retention efforts into the culture, headhunters have a difficult time prying talent out of the organization. They cannot steal employees who feel honored, respected and valued in their present situation.
Hold Managers Accountable for Reducing Turnover

Every participating organization acknowledged the need to fairly and effectively hold managers accountable for engaging and retaining good people. They also acknowledged the inherent challenge in this task.

More than ever, retention and engagement-focused organizations rely on competent managers who excel in the soft skills. A global financial services organization trains managers in soft skills and expects leaders to be retention missionaries. The company builds loyalty from the beginning in their hiring, training and career development program. Managers go through a Retention Focused Manager 180° Assessment program with employees and peers. Compensation is linked not only to turnover numbers, but also to talent kept. Great management of people is their key to retention.

Another participant organization holds managers accountable for their people-management skills by annually surveying all employees in a Workplace Audit. Managers are expected to score in the top 15% of this employee satisfaction audit overall, with the organization seeing significant improvement since implementing the measurement system.
Brainpower remains a key differentiator in today's competitive markets. The organizations with the best talent WIN. In the midst of a slow economy and a take-no-prisoners stock market, attracting, recruiting, hiring, retaining and engaging top talent can make or break any organization. With a labor shortage expected to hit 10 million workers by 2010, 43% of our labor force being eligible to retire in the next decade and demand for knowledge talent expected to outweigh supply by 20% through 2005, talent management remains one of management's highest priorities.

Today's leaders must manage the scarce commodity called talent to sustain their competitive edge. Talent leaders profiled here have developed some of the solutions. There will always be room for more great ideas as the shifts in markets, culture and generations keep talent managers challenged.
The following are some of Career Systems International's tools, programs and solutions being used by companies represented in this report.

**WORKSHOPS & ON-LINE APPLICATIONS**
- RETAINING & ENGAGING
  - Love 'Em or Lose 'Em: Building Loyalty & Commitment in the Workplace™
- WORKPLACE SATISFACTION
  - SatisfACTION Power™
- ENGAGING
  - Engaging the Generations™
- DEVELOPING
  - CareerPower™ and CareerPower for Coaches™
- MENTORING
  - MentWorking™, PowerMentoring™, PartneringPower™

**TOOLS, SURVEYS, BOOKS**
- 180° FEEDBACK INSTRUMENT
  - Retention-Focused Manager™
- ASSESSMENT TOOLS
  - Run the Numbers™, The Retention Deficit Disorder™, ThinkPak™/Retention Card Deck, Invest In Your Values™
- ATTITUDE SURVEY
  - Love 'Em or Lose 'Em: A Retention/Engagement Culture Check™
- BOOKS
  - *Love 'Em or Lose 'Em: Getting Good People to Stay* (Berrett-Kohler, 1999, 2002)
  - *Love It, Don't Leave it: 26 Ways to Get What Your Want at Work* (Berrett-Kohler, 2003)
  - *Up is Not the Only Way* (Davies-Black, 1997)