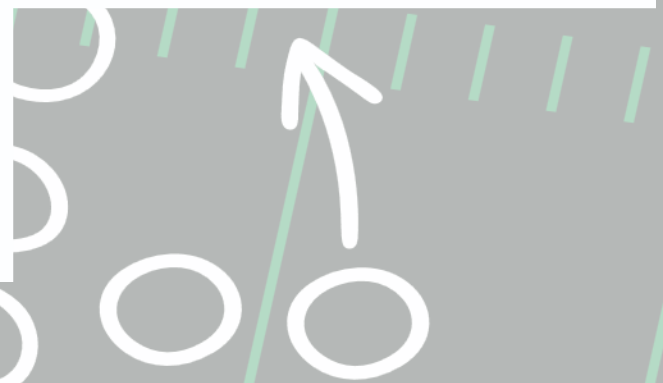




The Way Forward: An Ultimate Playbook for Employee Engagement Practices



February, 2025 v3



National Center on
Program Management and Fiscal Operations

What's the Play?

February, 2025

Situation Awareness If you want to...	The Play Use this suggested tool...
Conduct effective surveys that foster a culture of trust, accountability, and continuous improvement.	Pre-Survey Employee Engagement Checklist page 4
Design a survey that is clear, comprehensive, and aligns with meaningful insights to drive engagement.	Employee Engagement Sample Statements page 7
Focus on the strategic direction for the employee engagement survey.	Leveraging Employee Engagement Success page 10
Proactively address issues, optimize strategies, and create a workplace where employees feel motivated, committed, and connected to the organization's success.	Audit Your Employee Engagement Practices page 12
Lay the groundwork for actionable steps, identify critical insights, and ensure employee feedback is translated into meaningful organizational improvements	Initial Interpretation of Employee Engagement Survey Results page 15
Determine how you might use the four data activities to inform your employee engagement practices through the employee engagement survey	Analyzing Employee Engagement Survey Data page 16
Circle back and interview groups or individuals to further verify or clarify survey results	Post-Survey Follow-up page 18
Empower employees to take ownership of their engagement, align personal and professional goals, and contribute more meaningfully to the workplace	Self-Reflective Engagement Indicators page 24
Ensure leaders and managers are self-aware, accountable, and proactive in their development and provide regular and ongoing staff supervision with meaningful and effective employee engagement practices	Strategies for Managers: A Self-Reflection Tool page 26
Maximize the value of departing employee feedback while maintaining professionalism, consistency, and respect throughout the process.	An Exit Interview Guide page 28
Emphasize ongoing engagement and help to identify and address potential issues before they lead to turnover, foster trust, improve employee satisfaction, and build a culture where employees are motivated, committed and connected.	Increase Employee Engagement Retention Stay Tools
Gain insights into the organization's current state, evaluate the risks and opportunities associated with launching an employee engagement survey.	Readiness for Change Assessment Tool

Introduction to the Ultimate Playbook for Employee Engagement

In today's early care and education work environment, adapting practices that have proven successful in other work industries is a valuable strategy. Adapting employee engagement practices is one area to do so. An engaged workplace is more than a desirable outcome—it's a strategic advantage. Employee engagement is not just about job satisfaction; it's about fostering a workplace culture where employees are motivated, committed, and connected with program goals. This synergy drives productivity, innovation, and long-term success.

The foundation of any effective employee engagement practice lies in understanding what truly matters to your organization, program, and staff. Employee engagement surveys are powerful tools that provide invaluable insights into the thoughts, feelings, and motivations of a workplace. However, the true value of these surveys goes beyond merely collecting data; it's about transforming that data into meaningful actions that resonate with employees.

This Ultimate Playbook for Employee Engagement has been designed to guide you through every step of the engagement survey process, from preparation to post-survey action. Each section of this playbook is a vital piece of the puzzle, helping you turn survey insights into transformative outcomes.

The playbook can: (1) contribute to creating a systematic approach for staff training and professional development that is closely linked to employee engagement practices; (2) pave the way to bolster management systems that promote clear and reasonable roles and responsibilities for all staff and provide regular and ongoing staff supervision with meaningful and effective employee engagement practices; or (3) contribute to renovating a program-wide culture that empowers staff as professionals and supports staff in effectively accomplishing their job responsibilities in a high-quality manner.

Whether you're conducting your first survey or refining your approach, this playbook is your resource to foster a workplace where employees feel motivated, committed, and connected. Let's begin the journey toward renovating a culture where engagement is not just measured, it's **cultivated** and **sustained**!

How to use the playbook:

The playbook includes specific plays (tools) for various situations, such as leveraging employee engagement success or analyzing engagement data. Each tool is designed to operate independently and can be used to best support your organization or program's progress. Each tool spells out its suggested use. You have the flexibility to adapt how you use them. You may choose (1) to modify the tools, (2) to select specific sections, ideas, or content that are relevant to your needs, or (3) to combine elements from multiple tools to create a new resource that is most beneficial for your organization or program.



Pre-Survey Employee Engagement Questions

Before you launch your next employee engagement survey, it is crucial to assess how prepared your leadership team is to take ownership of the process. An engagement survey isn't just a tool for collecting data; it's an opportunity to drive meaningful organizational change. To make the most of this opportunity, it's essential first to clarify the types of insights you hope to gain from your staff's feedback. By considering the questions you want answered, you can ensure that your survey will deliver actionable results that resonate with both leadership and employees.

Suggested use: Please respond to the questions below to ensure your leadership team is prepared to interpret and act on the survey data effectively.

Questions to Consider	
1.	What are some of the demographic differences among staff? (There are many possible groupings that could be of interest for example: background, age, sex).
2.	What are some of the organizational groupings we want to look at? (For example: job function, experience levels, organizational level, facilities, locations, cultural or community engagement groups).
3.	How can we use engagement data to evaluate the impact of new practices or initiatives we've implemented in our program?
4.	How can we examine changes in employees' experiences before and after these types of interventions (i.e. surveys)?



Questions to Consider

5.	In the past, how have our survey results been used?
6.	In the past, what were some of the ways that employee engagement data influenced management decisions?
7.	In the past, have we reported survey data to employees? Please explain.
8.	Have we taken direct action in the past in response to employee engagement data? Please explain.
9.	How have we established a way to analyze engagement levels and share those results with the relevant managers? This will help them take ownership of engagement within their teams, allowing for targeted improvements and support that benefit staff.
10.	Are response rates sufficiently high to provide us with good data? Please explain.



Questions to Consider

11.	Moving forward, how will we use our survey results?
12.	Moving forward, how will employee engagement data influence management decisions?
13.	Moving forward, how will survey data be reported to employees?
14.	Will the survey be distributed as anonymous or confidential? Please explain.
15.	Do we have an action plan to address our survey results? Please explain.



Employee Engagement Survey Sample Statements

Background

When developing an Employee Engagement Survey, it is essential to draw on evidence-based research and established promising practices focused on employee engagement. Dr. Marshall Goldsmith is an American executive leadership coach and author of 36 books, including three New York Times bestsellers. He states, “there are 3 things employees want.”

1. Meaning: Connecting work to employee’s purpose. It’s your motivation to do what you do best.
2. Membership: Being a part of something special. Employees want to know that they make a difference.
3. Mastery: Employees want to know whether their organization cares about them and is committed to their growth and development.

W. Edwards Deming’s **14 Points for Management**, first presented in his book *Out of the Crisis*, address joy, but use different terms. He wrote, “remove barriers that rob the hourly worker of his right to pride of workmanship.” For Deming, “pride of workmanship” and “joy” were highly related, if not interchangeable.

Later in life, Deming increasingly emphasized the importance of joy in work. In his final lectures, he routinely stated that, “Management’s overall aim should be to create a system in which everybody may take joy in [their] work.” Ensuring joy is a crucial component of the “psychology of change,” one of the cornerstones of Deming’s scientific approach to improvement. In addition to being a core part of his theory of improvement, joy in work was also a fundamental right. He argued that it is up to leaders to ensure that workers can enjoy that right. He said, “People are entitled to joy at work.”

The 12 Engagement Elements, often referred to as the “Q12” from Gallup’s research on employee engagement, are key factors that drive employee engagement and satisfaction within the workplace. These elements are based on decades of research and are designed to measure how well employees’ fundamental needs are being met. The 12 Engagement Elements (see Appendix A) provide a framework for creating an engaging workplace that fosters trust, collaboration, recognition, and growth. By addressing these elements, organizations can enhance employee satisfaction, reduce turnover, and improve performance.

Suggested use: Use these statements when designing your survey. Engagement surveys include questions related to psychological and behavioral engagement, as well as actions that your organization has taken in the past to improve engagement. Tailoring your questions around these statements can help you identify areas for growth and enhance overall organizational performance. Based on how your survey is designed, a Likert scale may be useful. (e.g., 1- 5 or strongly agree to strongly disagree).

Psychological Meaningfulness *has to do with whether or not people feel that they have a reason to engage in their work. These statements relate to job characteristics, work interactions, meaningfulness, and a sense of work-focused energy.*

- The people I work with cooperate to get the job done.
- My interactions with my coworkers are rewarding.
- My co-workers value my input.
- I find the work that I do to be challenging.
- The work I do on this job is worthwhile.
- My job activities are personally meaningful to me.
- I am excited about how my work matters to our team and the company.
- My work makes me feel good about myself.
- Time goes by very quickly when I am at work.
- I find it very easy to stay focused on what is most important for me to accomplish at work.
- I feel confident that I can meet my goals.

Psychological Safety *has to do with whether or not people experience the freedom and the safety to engage in their work rather than feeling like they have to protect themselves in some way. These statements relate to trust, fairness, and to management style and management behaviors.*

- I can take action to satisfy families or community partners without worrying about being second-guessed by my manager.
- I feel safe to speak my mind about improving things.
- My manager encourages others to voice opposing points of view.
- My manager is more concerned with being right than doing the right thing.
- I can be myself at work. Intergroup relations tend to be characterized by respect and trust.
- My coworkers value what makes me unique.
- Decisions are made using fair procedures.
- My boss treats me fairly in how s/he interacts with me.
- When my manager promises something, I can be confident that it will happen.
- My relationship with the organization is based on mutual trust.
- The organization cares about my opinion.
- I trust my supervisor.
- I would feel good about letting my supervisor make decisions that seriously affect my life.
- I really wish I had a good way to keep an eye on the senior leadership team.

Psychological Availability *has to do with having the capacity to engage. Do I have what it takes to engage fully in my job? It has to do with someone's individual circumstances. These statements relate to physical and psychological well-being, confidence, and outside life.*

- After work, I feel worn out and weary.
- After work, I have enough energy for my leisure activities.
- My supervisor helps me to develop confidence in my ability to do my job well.
- I can make a difference around here. I am self-assured about my capabilities to perform my work activities.
- My supervisor supports my need to balance my work and personal life.
- I participate in cultural and recreational activities in my local area.

Behavioral Engagement *refers to observable actions and participation in a specific activity, environment, or process. These statements relate to behaviors and serve as indicators of motivation, commitment and connection to the work.*

- The norm here is to stay with a problem until it is solved.
- The people here take on new responsibilities as the need arises.
- People around here maintain their focus even in the face of obstacles.
- We persist when faced with difficulties around here.
- We get things done when they need to be done.
- We take on new responsibilities.
- We adapt well to necessary changes.

Adapted from ILRHR556: Strategic Engagement Cornell University ILR School

Leveraging Employee Engagement Success

This resource is designed to offer valuable insights into innovative practices from leading organizations in engagement. It serves as a practical tool for leadership discussions.

Suggested use: It can be used as a guide during strategy sessions and when planning your engagement collaboratives to track workable solutions. For each statement, describe the key indicators that reflect how your program practices are demonstrated.

Strategies to Consider	
1.	Programs with strong engagement incorporate goals for enhancing engagement activities into their annual performance and development plans. They hold leaders accountable for achieving these goals and follow through. Key Indicators:
2.	Programs with strong engagement expect their leaders to be transparent with the survey results and have them discuss findings and develop action plans with their teams. Key Indicators:
3.	Programs with strong engagement, are encouraged to inform staff and share survey results. These opportunities foster open dialogue, allowing everyone to contribute ideas and insights. Key Indicators:
4.	Programs with strong engagement work with employees to ensure managers have taken action on the previous engagement survey results. Key Indicators:
5.	Programs with strong engagement share survey results with stakeholders, parents and the community as appropriate. Key Indicators:

Strategies to Consider

6.	Programs with strong engagement share success stories. Key Indicators:
7.	Engaged programs incorporate engagement principles into their employee recognition programs; leaders share positive examples to inspire and drive organizational buy-in. Key Indicators:
8.	Engaged programs empower employees to identify and act upon solutions that contribute to organizational objectives; they display a relative absence of “red tape” or rigid policies that inhibit innovation, cooperation, or responsiveness. Key Indicators:
9.	Engaged programs offer cohort-based training, establishing a sense of membership and opportunity for new employees and allowing them to form relationships and support networks early on. Key Indicators:
10.	Engaged programs use communication and storytelling; leaders share ideas, photos, and successes in company newsletters; innovations and new ideas are shared via internal bulletin boards. Employee testimonials echo and emphasize company values in practice. Key Indicators:
11.	Engaged programs facilitate onboarding efforts, where employees create a development plan for their first six weeks and a plan for their first year. These plans are aligned with at least one of the company’s strategic priorities so employees can see and connect how their work directly contributes to organizational outcomes. Key Indicators:

Adapted from: ILRHR556: Strategic Engagement Cornell University ILR School



Audit Your Employee Engagement Practices

Strategically focused human resource practices can create a stronger competitive advantage than standard approaches, and the same goes for employee engagement. Eliminating any uncertainty about what engagement means at a strategic level and how it shows up in the behavior of employees is vital.

This tool is designed to help you assess your engagement practices. It can be useful in leadership discussions about engagement, serving as a catalyst for conversations around strategic HR efforts. Consider organizing an Engagement Committee where leaders and staff can come together to clarify what engagement looks and feels like amongst teams.

Suggested use: Respond to each question. If your answer is “yes,” please explain how. If your answer is “not yet,” consider what you might need to do to move forward.

Considerations		Yes	Not Yet
1.	At your program, do employees know what the strategic focus of their engagement should be?		
2.	Do you, your leaders, and your employees understand what engagement means?		
3.	Does your measurement of employee engagement align with your definition of employee engagement?		
4.	Are your engagement questions customized enough to your program to be useful?		



Considerations		Yes	Not Yet
5.	Do your engagement questions assess strategic engagement behaviors?		
6.	Do leaders receive engagement survey results relating to their specific roles? Are leaders expected to discuss survey results with their employees and identify appropriate action steps?		
7.	Are managers empowered to develop and act upon their own action plans for how to improve engagement within their sites?		
8.	Is employee survey data collected and analyzed in a way that enables you to link it with other data (e.g., to test whether the implementation of a new initiative is associated with improvements in engagement, or identify which of the five drivers are the strongest predictors of turnover across employee groups)?		
9.	Do senior leaders openly communicate the fundamental ways in which employee engagement contribute vitally to the organization's ability to create and sustain competitive advantage?		
10.	Is there a common expectation for what engagement means for both the organization and its employees?		

Considerations		Yes	Not Yet
11.	Is your program's engagement strategy visibly woven into the design and implementation of all HR practices?		

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Initial Interpretation of the Employee Engagement Survey Data Results

After the final submission date for surveys, consider gathering initial thoughts from the leadership team.

Suggested Use: Use this tool as a springboard for group discussion with the leadership team. Respond to the questions by offering your interpretations about what the initial data signifies. Then, conduct a meeting with the team to discuss initial thoughts. This step can be helpful in determining next steps.

Interpretations	
1.	What was the percentage of survey returns? Was it high or low? Was it what you expected? What do you think explains the survey return rate?
2.	Reflect on the most recent employee engagement survey results. What do you think explains the results that you see?
3.	Reflect on the range of scores. Why do you think scores are higher in one area than another? Why do you think scores are lower in one area than another?
4.	As you talk to employees, can you collect stories that can help you to interpret the results and develop initial thoughts about possible root causes?
5.	Based on your analysis and interpretation of the survey data, what do you think are the areas that warrant the most attention?
6.	What additional engagement data do you think your organization needs?

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Analyzing Employee Engagement Survey Data

This resource is designed to support programs in strategically planning for the analysis and interpretation of employee engagement data by guiding you through the four phases of a data lifecycle. By following the data lifecycle, you can ensure a systematic approach to employee engagement surveys, leading to well-informed, targeted actions that improve workplace culture and address employee needs effectively.

The Four Data Activities are (1) prepare; (2) collect; (3) aggregate and analyze; (4) use and share. By collaboratively answering the questions, your team will uncover key trends and draw meaningful insights.

Suggested use: Use this as a foundation for group discussions, and leverage the findings gained to drive quality continuous improvement and inform decision-making.

Prepare	
1.	What are the data questions? (i.e. Has engagement increased over the year? Has engagement impacted retention? What do staff need to feel motivated, committed and connected to the work?)
2.	What employee engagement data do we need to answer the questions identified?
Collect	
1.	What tools are used to collect engagement data?
2.	How do we ensure that the data collected is consistent?

Aggregate and Analyze

1. How are engagement data being analyzed and reported?
2. Are there important comparisons that are missing from the data?
3. What group dynamics are being examined?
4. What additional data do we need?

Use and Share

1. How will the data be used to support continuous improvement and change?
2. How will data be used and shared?
3. What other stakeholders should we involve in this inquiry process?



Post-Survey Follow-Up

The organization has analyzed survey results and may need to validate or confirm the next steps. Also, some data may need to be clarified or probed a little deeper. Before finalizing action plans, follow-ups, such as focus groups, discussions, or interviews with employees, may be necessary.

Suggested use: Use the observations for individuals or as an overall assessment of a group (i.e. admin team or family services team). You may want to reframe the questions that are listed or use them to conduct open-ended conversations.

I. Briefly describe the team you have chosen to examine/interview. Say a little about why.	
II. Psychological Meaningfulness <i>has to do with whether or not people feel that they have a reason to engage in their work. These questions relate to job characteristics, work interactions, meaningfulness, and a sense of work-focused energy.</i>	
Questions	Briefly describe your observations
How meaningful or rewarding is the work itself? Is there significant variety, challenge, significance, and clarity associated with the tasks that make up the relevant job(s)?	
How is the level of fit between employees' knowledge, skills, and abilities and the demands of the job?	
How strongly do employees identify with the values and mission associated with the job and with the broader organization?	

II. Psychological Meaningfulness *has to do with whether or not people feel that they have a reason to engage in their work. These questions relate to job characteristics, work interactions, meaningfulness, and a sense of work-focused energy.*

Questions	Briefly describe your observations
Do employees have opportunities to make decisions that impact the way the job is done? What about input into decisions that affect the broader organization?	
Do employees receive the feedback that they need to understand how well they are doing on the job? Can they use this feedback to continually improve their performance and redirect their energies?	
What is the quality of interactions among employees? Do people share information and coordinate well with each other? Do they help each other? Do they engage in meaningful interactions that are personally rewarding?	
Do the employees feel appreciated and valued for the work they do?	



III. Psychological Safety *has to do with whether or not people experience the freedom and the safety to engage in their work rather than feeling like they have to protect themselves in some way. These questions relate to trust, fairness, and to management style and management behaviors.*

Questions	Briefly describe your observations
Do the employees feel safe in expressing their views or ideas?	
Are there risks associated with taking initiative by expressing disagreement or trying to make changes or improvements to the way that things are done?	
Can the employees rely on being treated fairly?	
Does it seem that some types of employees have privilege (i.e., access to resources and opportunities) that others don't?	
Does the manager play favorites?	
Does the manager trust employees (or you), for example to be able to make good decisions, or to act in the best interest of the organization?	

III. Psychological Safety <i>has to do with whether or not people experience the freedom and the safety to engage in their work rather than feeling like they have to protect themselves in some way. These questions relate to trust, fairness, and to management style and management behaviors.</i>	
Questions	Briefly describe your observations
Do employees trust the manager? Management in general?	
Do managers' actions align with their words (i.e., do they do what they say they will do)?	
Are some employees up against negative or erroneous stereotypes?	
Is there a norm for people to be open to learning, especially from mistakes and each other?	

IV. Psychological Availability *has to do with having the capacity to engage. Do I have what it takes to engage fully in my job? It also has to do with someone's individual circumstances. These questions relate to physical and psychological well-being, confidence, and outside life.*

Questions	Briefly describe your observations
Are employees under significant levels of stress resulting from long working hours, intense pressures to deliver (results, deadlines), being understaffed, or difficult working conditions?	
Are employees experiencing strain on the job as a result of feeling like they lack the preparation, skills, or confidence to do what is being asked of them?	
Are there any other significant sources of frustration or anxiety that may be causing emotional exhaustion among employees?	
Are employees being supported to meet their non-work needs? For example, are they being given flexibility in when/where they do some of their work, or having a manager and coworkers who are sympathetic to the challenges associated with juggling multiple roles?	
Do employees have the opportunity to experience meaningful sources of engagement in their non-work lives?	

V. Conclusions	
Summary	Offer your conclusions
What have you determined to be the root causes for low levels of engagement in this case?	
Summarize your “diagnosis” or hypothesis about the two or three factors that you believe might be most important to address in an effort to increase engagement.	
What are your recommendations for improvements?	

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Self-Reflective Engagement Indicators

An engaged employee is motivated, committed, and connected, contributing positively to a healthy work culture. They show initiative, maintain a positive attitude, and collaborate well with colleagues. A disengaged employee, on the other hand, lacks motivation, leading to poor performance, low productivity, absenteeism, and a negative attitude, which can harm the work environment and impact safety.

A self-reflective engagement assessment helps employees become more self-aware by identifying strengths and opportunities for improvement. This process boosts productivity, job satisfaction, and empowerment, allowing employees to take ownership of their engagement, improve their performance, and possibly identify career goals.

After you have completed the assessment, utilize the comments to prioritize. Complete the action plan to help create specific, measurable, and achievable goals to address responses to the engagement indicators, such as improving communication skills, increasing participation in team activities, or seeking professional development opportunities.

Suggested use: Mark an 'x' on the line to indicate where you fall on the engaged/disengaged continuum. Add a comment that says more about why you marked the continuum as you did. After completing the self-reflection, assess your responses. Then, identify your next steps.

Key Engagement Indicators	Engaged	Disengaged	Key Disengagement Indicators	Comments
Involved, empathetic, or has an emotional connection to work			Robotic, apathetic, or detached behaviors	
Energized, proactive, or willing to put in effort			Withdrawn, burned out, or shows little or no effort	
Enthusiastic and willing to contribute personally and emotionally to tasks			Goes through the motions of work but is not giving of self	
Willingness to build meaningful, collaborative connections with colleagues			Do not develop close, constructive relationships at work	
Diligent in maintaining quality			Lack of vigilance for quality	
Driven by a pursuit of excellence			Satisfied with good is enough, as opposed to striving for excellence	
Expresses true identity, perspective, capacity, and creative thoughts openly			Do not reveal true identity, perspective, capacity, and creative thoughts	

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What are your next steps after assessing your responses to each engagement indicator?

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Strategies for Managers: A Self-Reflection Tool

This tool is designed to assess and enhance your approach to working with staff.

Suggested use: To use this resource effectively, begin by reviewing the engagement-focused management strategies provided for each area of management. Reflect on your current practices and take notes on specific actions or adjustments you could make. Be sure to jot down both what's working and opportunities for growth, focusing on specific examples or behaviors to guide development. Finally, apply the insights gained through regular self-assessment and by seeking feedback from others to continuously enhance your supervisory and management skills.

Engagement-Focused Management Series	Reflections
Managers take the time to understand their teams. They set aside time at the beginning of meetings for informal conversations, approach staff like they are valuable members of the team, and the meetings are productive.	What's working Opportunities for growth
Managers provide opportunities for people to interact informally.	What's working Opportunities for growth
Managers show concern when staff are dealing with personal issues or working too hard.	What's working Opportunities for growth
Managers enhance employee engagement by creating a culture of open communication, where employees feel comfortable sharing ideas, feedback, and concerns, leading to a more supportive work environment.	What's working Opportunities for growth
Managers communicate to employees that the organization recognizes them as individuals and values their specific contributions.	What's working Opportunities for growth
Managers foster a culture of trust, empowering employees to fully invest their energy and commitment in their work, which promotes focus, collaboration, and productivity.	What's working Opportunities for growth

Engagement-Focused Management Series	Reflections
Managers contribute to psychological safety by ensuring fair treatment of employees, thereby preventing feelings of vulnerability or a lack of support from both the manager and the organization.	What's working Opportunities for growth
Managers foster employee initiative by providing support and encouragement. They promote a learning culture by viewing mistakes as opportunities for growth rather than reasons for punishment.	What's working Opportunities for growth
Managers can provide resources to alleviate employee exhaustion by offering opportunities for rest and stress relief, supporting employees in managing non-work responsibilities when necessary, and fostering employee confidence in their abilities.	What's working Opportunities for growth

Action Plan

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Engagement-Focused Management Strategies	Reflections

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An Exit Interview Guide

An exit interview is conducted as an opportunity to gather feedback from employees who are leaving an organization. It serves as an opportunity for the organization to understand the reasons behind the employee's decision to leave, gain insights into workplace culture, management practices, and employee satisfaction, and identify areas for improvement. However, many employees who are leaving are not forthcoming during exit interviews for several reasons, often tied to personal, cultural, or organizational dynamics. Many employees do not want to burn bridges; they feel the pressure to be diplomatic; they are already disconnected; or want to leave on a positive note. Understanding these reasons can help organizations create an environment where departing employees feel more comfortable providing honest feedback.

This exit interview guide provides an alternative strategy for conducting exit interviews.

Suggested use: Read the following guide. Most importantly, pay attention to the tone and the method used. It may help reframe how you conduct exit interviews.

As part of policies and procedures for exiting employees, the employee is contacted to schedule the exit interview. If needed, alert the employee that there's no need to prepare in advance. You're just going to chat. Nothing will be judged; everything will be kept confidential. You might say something like:

An exit interview provides great opportunities to gain some insights on things we might do differently or better in the future. It can also identify ways we might continue supporting you as you move forward with your career outside our organization. With this in mind, I will be jotting down notes. Also, if you would like to say something and don't want it to be written down, please let me know to stop writing for that moment.

Relate the conversation to creating a documentary film about the person's career move.

With that frame in place when the interview was scheduled, the interview can be conducted along these lines:

Please share some of the details about when you started thinking about switching jobs, when you made the decision, and when you actually came on board here. As the interviewee talks about a certain event or realization, the interviewer might ask clarifying questions, such as "Who was with you? What time of day was it? Where were you?" Think of this as capturing a close-up shot for this film so that we can get the specifics and the mood just right.

You don't need to use this exact language. Say what feels natural to put the person at ease.

Ask for context about the job move. Have the employee describe their previous job, what life was like then, and what work and life are like now. Offer a prompt if one seems to be needed:

Share whatever basics feel relevant, such as how long you were in your previous job when you switched, and what might have been happening for you at the time.

Although you want details, you're not trying to create an exhaustive biography or act as an armchair psychologist. The objective is to understand the events leading up to the change.

Let the employee talk uninterrupted for a bit. You will probably hear all kinds of things about this most recent switch—which may or may not be relevant to its motivations. Let all those thoughts come out at the beginning of the conversation. Then, steer the interview to where you want it to go.

If you feel the employee's energy flagging, jump in. Start focusing on the order of events. You might ask:

How did all this come about? Do you remember the first time you thought you might be ready to leave for another job?

To be fair, your employee might not remember—or a quick answer might not be accurate. Keep digging as it feels comfortable.

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Follow up with highly specific questions. For instance:

What was your day-to-day experience like the first year or two (at the beginning of their time)?
What events led up to that shouting match between you and your coworker?

While working through the sequence of events, the employee may suddenly land on a key moment of realization.

Refer to other people in the employee's story by name. If your exiting employee mentions a difficult conversation with someone and names them, use that person's name in your follow-up questions. Names have the power to recall emotions and memories..

Empathize, but don't overdo it. It's OK to show that you can relate (as in "Yeah, that's happened to me, too"), but you might come across as thinking you know everything if you interject too much. That tends to shut people down. Remain inquisitive.

Listen deeply. When describing the circumstances surrounding the job switch, the exiting employee might share an important insight, such as "I was just so sick of missing my daughter's softball game yet again because of a fire drill at work and then having to explain to her why I missed it. It had to change." That's something solid you can build on. Play back what the person said—and then push a bit more.

Tease out deeper motivations by offering points of contrast. For example, about those missed softball games, you might ask:

How did you feel? Guilty and frustrated with yourself? Or annoyed by pressure from family members?

By offering two contrasting options, you can elicit an emotionally revealing response (possibly “Neither! It was this!”) and gain greater insight.

To further explore what you learn, ask for more details.

How often were you missing family time for work? Were you missing other important things for the same reason? When did that start, and how often did it occur? When did it become a big problem?

Fill any holes. When people use general language to describe events, the natural tendency is to nod along. Don’t assume you understand. Again, contrast creates meaning. For example, if it is indicated that they ruled out another job offer because the manager didn’t seem “nice,” ask what that means:

Are managers nice when they are generous with praise? Or when they give you honest feedback without belittling you?

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Both might be nice. But by holding up concrete examples, you can home in on what’s really meant.

Change your line of inquiry if the employee starts just agreeing with you. That can mean you’re not getting the whole story. Revisit something you don’t fully understand and probe for clarification.

At the end of the story, share back what you heard start to finish. Spell out the whole timeline of events (this will be easier if you took copious notes) and give the employee space to correct things or add what you missed.

Adapted from: *Harvard Business Review*. (2024, November-December). *Why did they leave: An interview guide*. *Harvard Business Review*, 102(6).



- Q12. This last year, I have had opportunities at work to learn and grow.
- Q11. In the last six months, someone at work has talked to me about my progress.
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- Q10. I have a best friend at work.
- Q09. My associates or fellow employees are committed to doing quality work.
- Q08. The mission or purpose of my company makes me feel my job is important.
- Q07. At work, my opinions seem to count.
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- Q06. There is someone at work who encourages my development.
- Q05. My supervisor, or someone at work, seems to care about me as a person.
- Q04. In the last seven days, I have received recognition or praise for doing good work.
- Q03. At work, I have the opportunity to do what I do best every day.
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- Q02. I have the materials and equipment I need to do my work right.
- Q01. I know what is expected of me at work.