**Logo, company name

Description automatically generatedHR Solutions - Stay Interview Template**

**Pre-Meeting**

* Schedule the meeting and let the employee know the purpose of the meeting in advance. This will help them prepare for a more valuable conversation.
* Schedule the meeting in a place conducive to safe and casual conversation. Personalize the conversation and avoid just reading through each question.
* Do not dismiss an employee’s idea even if you disagree.
* Don’t make commitments in the moment you can’t guarantee. A good response is always, “Thanks for sharing, let me think about that a little more and get back to you.”

**Open The Meeting**

* The goal of this meeting is for the employee to get to know you better and learn if there are steps you can take to improve your experience as an employee.
* **Conversation Starters**
  + “I hope our meeting helps you understand how much I appreciate your contributions to the agency.”
  + “I hope you will feel comfortable sharing what is on your mind. I can’t take positive steps if I don’t have your input and feedback.”
  + “I can’t promise I can act on every idea we discuss, but I promise to listen and carefully consider what is possible considering the overall impact to the agency and what is fair to all employees.”
  + “Do you have any questions or concerns before we get started?”

**Stay Interview Questions**

1. **When you travel to work each day, what are the things you most look forward to?**
   1. What do you like most about working at this agency?
   2. Is there something that you would like to be doing more of?
   3. Are there specific skills or interests you would like to use more often?

Goal: Working to your natural strengths increases job satisfaction. Determining the ways you can increase the amount of time the employee spends on a task they enjoy. Can you assign new tasks or special projects that will increase job satisfaction and engagement?

1. **What have you learned over the past year?** 
   1. Is there something you would like to learn but have not had the opportunity?
   2. How do you learn best? (self-taught, observing, taking a class)
   3. What do you see as next steps in your career? How can I support you?

Goal: Employees are most engaged when they feel they are growing and challenged. To determine how you can support their development.

1. **Why do you stay here? What motivates you to continue working here?**

Goal: To understand what drives and motivates your employee. Sometimes it is helpful for the employee just to connect with their *why* and verbalize it. The information will help you reinforce their reason for staying.

1. **When was the last time you thought about leaving? What prompted it?**
   1. Does this reason/concern still exist?
   2. On a scale of 1 to 10 with 1 being I am actively looking for a new job and 10 being I have no intention of leaving in the next year, how would you rate yourself?
   3. What is the single most meaningful action I could take to address the issue?

Goal: These are obviously hard conversations. Its in your best interest to know how your employee is feeling and not take adverse action towards them for being honest. If you have the real information you can take steps to retain them or engage in a transition process that is mutually beneficial.

1. **What ideas do you have for improving our culture and work environment?**
   1. What can I do to improve my leadership style?
   2. Are there things in our office you think are particularly unfair or unreasonable?
   3. How do you like to be recognized? (publicly/privately, what are some of your favorite foods, snacks, beverages, restaurants, hobbies)

Goal: Everyone likes to be asked their opinion and have their ideas included. Asking questions about your leadership style shows vulnerability and enhances trust/confidence in sharing feedback in the future. Understanding how a person likes to be recognized is an opportunity to making recognition more personalized and impactful.

**Close The Meeting**

* Thank employee for the meeting, for their candor, and for being vulnerable
* Reiterate how much you appreciate them
* Share some of your takeaways from the conversation

**Post Meeting**

* Use the information to make positive change. Follow through is the most important part of building trust. Not following through is more damaging than not having the conversation at all.
* Schedule a follow up conversation to finalize any action steps you will take as a result of the conversation

**Stay Interview Action Planning Template**

**Employee Name:**

**Employee Feedback:**

**Most Critical Steps I Can Take to Help Retain this Employee**

**1.**

**2.**

**3.**

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| --- | --- |
| Commitment #1 | |
| Leader Action Steps | Due Date |
|  |  |
|  |  |
|  |  |
| Employee Action Steps | Due Date |
|  |  |
|  |  |
|  |  |

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| --- | --- |
| Commitment #2 | |
| Leader Action Steps | Due Date |
|  |  |
|  |  |
|  |  |
| Employee Action Steps | Due Date |
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|  |  |

**Example**

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| --- | --- |
| Commitment #1 – Employee will learn how to quote and service towing companies with preferred Carriers by June 1st. | |
| Leader Action Steps | Due Date |
| Ask current employee to train/shadow |  |
| Assign a Towing Account/Schedule time to share expertise/history |  |
| Schedule time for employee to listen to/review |  |
| Employee Action Steps | Due Date |
| Research Training Options with Carriers/Seek approval and schedule training |  |
| Schedule time to shadow peers that already know the process and coverage |  |
| Ask employee to apply learning. Complete a review of a current client and share thoughts (additional coverage needed, questions to ask, loss control/safety/mitigation ideas to discuss with client) |  |

|  |  |
| --- | --- |
| Commitment #2 – Employee would like more flexibility in their schedule to take care of aging parent. | |
| Leader Action Steps | Due Date |
| Research if additional investments are needed and within budget (i.e. equipment) |  |
| Determine if preferred schedule is possible with coverage needs |  |
| Determine if employee has appropriate equipment and resources to work from home |  |
| Create policy/formal agreement. Set clear expectations |  |
| Schedule pilot meeting and time to evaluate success of the arrangement. Determine if changes are needed. |  |
| Employee Action Steps | Due Date |
| Provide details on what preferred work schedule would include |  |
| Verify you have the proper resources to successfully work from home (i.e. high speed internet, proper workspace |  |
| Review and sign formal agreement |  |
| Be proactive in communicating schedule to manager, peers, and clients. Be proactive in communicating productivity. |  |