

Exit Interview Program Analysis & Findings Summary: 2018

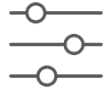


Program Findings & Advanced Analysis

Positive & Constructive Themes



Agenda



Introduction

Logistics and Parameters



Who leaves SampleCo + When do they leave
Demographics & Trends



Why do they leave?
Theme Insights: Positive, Constructive, & Observations



Significant Difference between Years



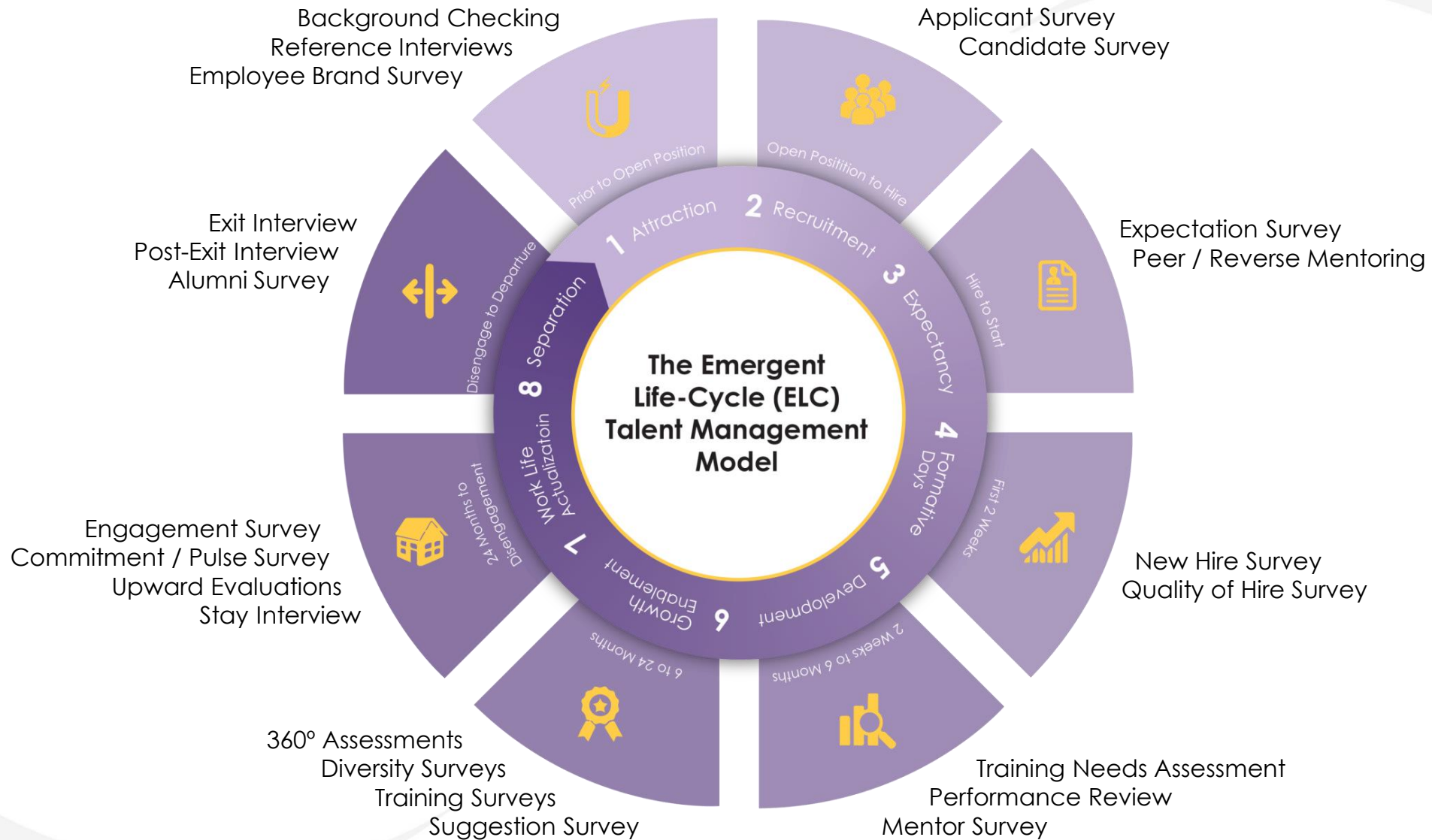
Group Comparisons: Age, Gender, & Performance



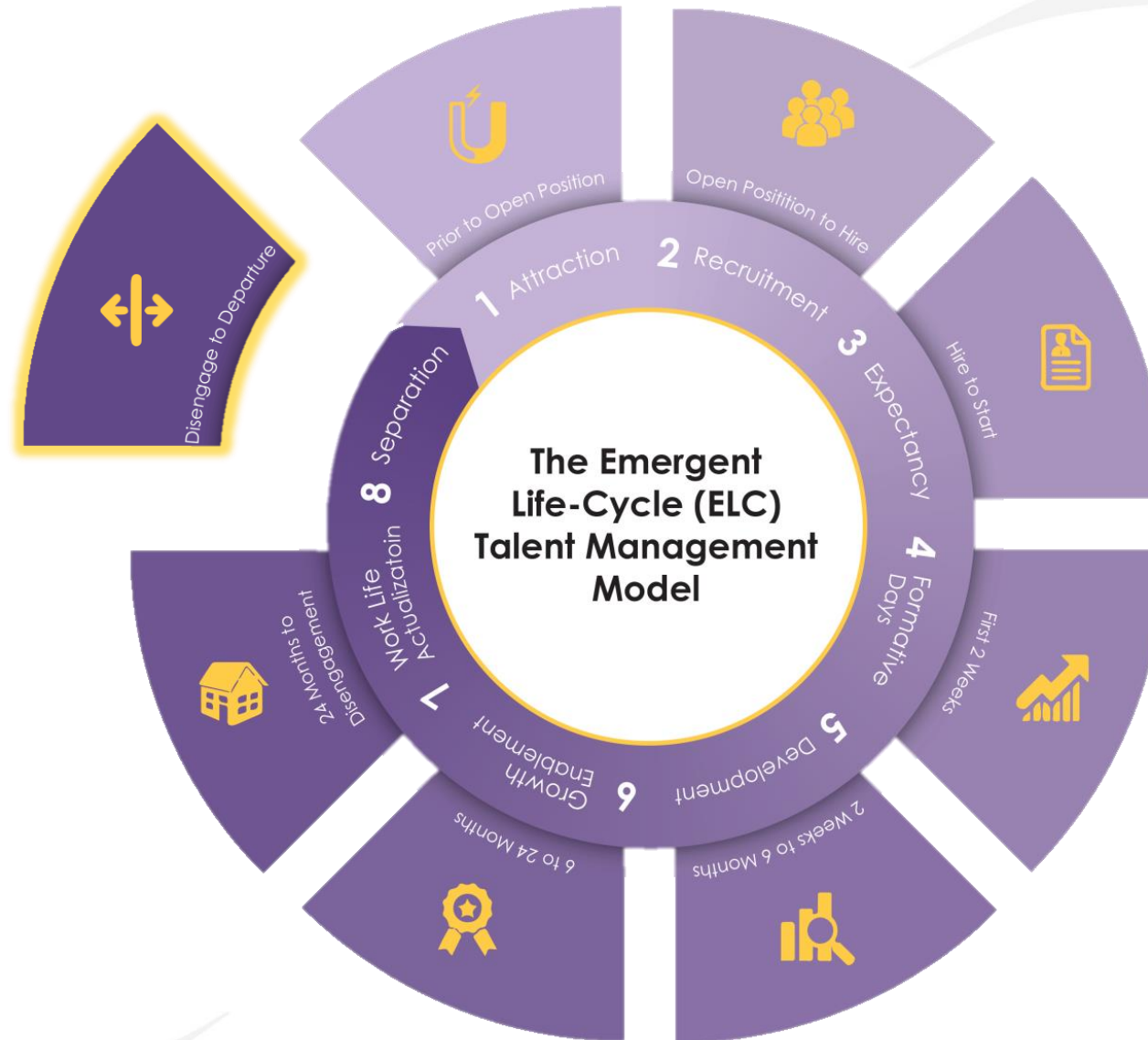
Complete Survey Results (Appendix)



How do we get there? Leveraging Real-time Insights for Real-time Action



FOCUS on Separation Stage: "Disengage to Departure"



Exit Interview Survey Parameters

SAMPLE SIZE

| Annual Cycle | 2016 | 2017 |
|-------------------------------|------|-------|
| Exit Interview Completed | 79 | 74 |
| Total Voluntary Separations | 128 | 121 |
| Completion rate | 62% | 61% |
| Total Involuntary Separations | 53 | 67 |
| Active Population | 982 | 1,448 |

SURVEY SCOPE

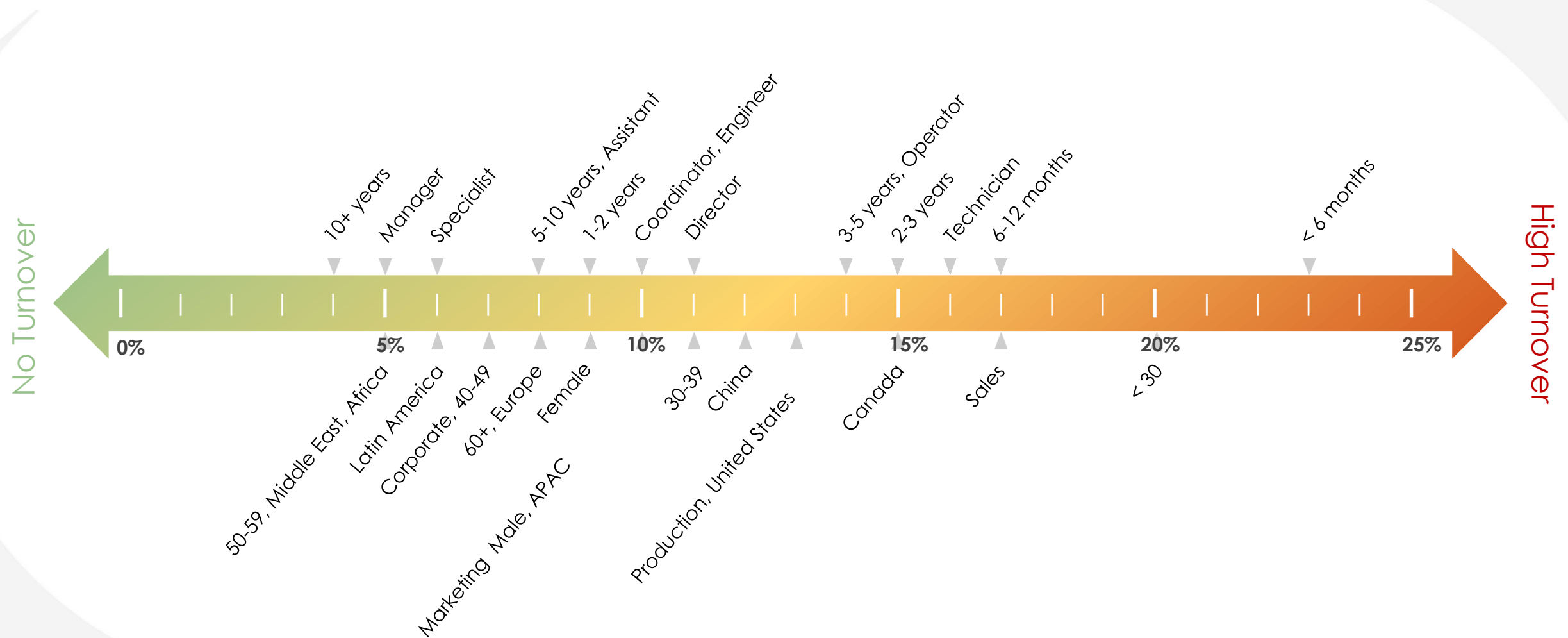
| Annual Cycle | 2016 | 2017 |
|-----------------|----------------------------|----------------------------|
| Survey Type | Voice Based | Voice Based |
| Questions | 36 | 36 |
| Items | 47 | 47 |
| Language | English | English |
| Target Audience | ✓ Individual Manager HR | ✓ Individual Manager HR |

DEMOGRAPHIC & ORGANIZATIONAL ASPECTS

| | |
|------------------------|---------------------------|
| Demographic | Age, Tenure, Race, Gender |
| Organizational Aspects | Department, Region, Title |



Voluntary Turnover Rate: Global - Employee Demographic Segments*

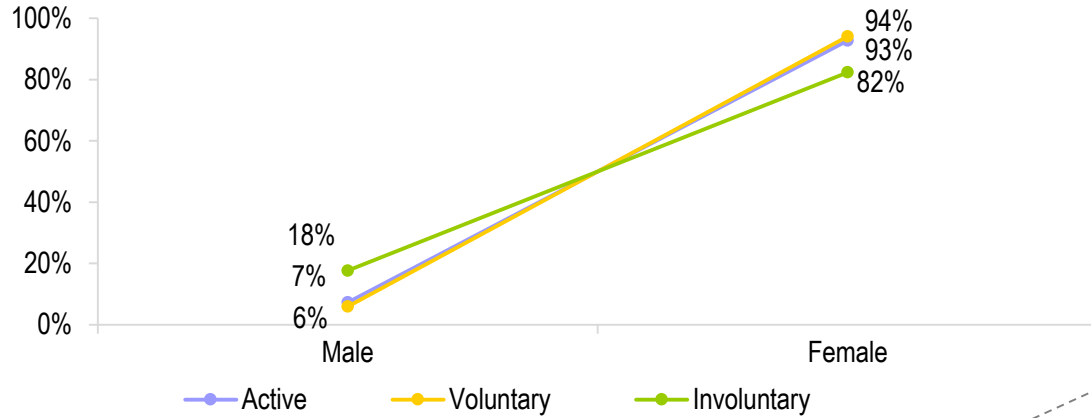


*Slides 6 through 12 reflect TOTAL Voluntary Separation data

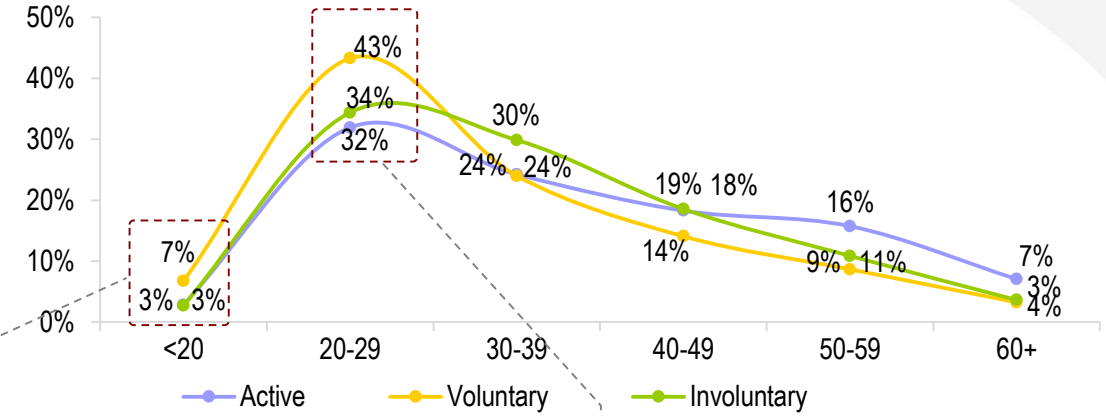


Who leaves SampleCo? 2017 Demographics: Separations vs. Active

Gender



Age



<20 year old employees are more likely to leave SampleCo because of:

1. Managers
2. co-workers

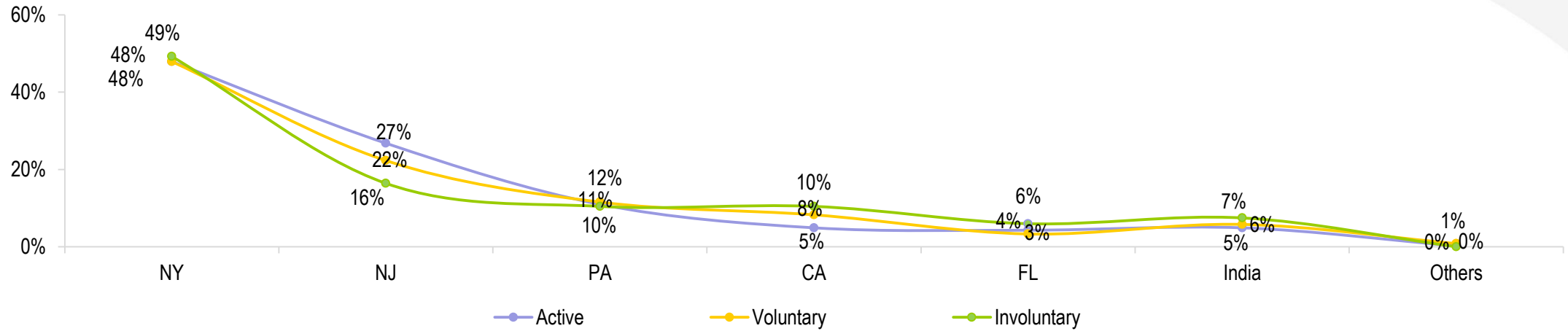
20-29 year old employees are more likely to leave SampleCo because of:

1. Base pay
2. Bonus/ Commission

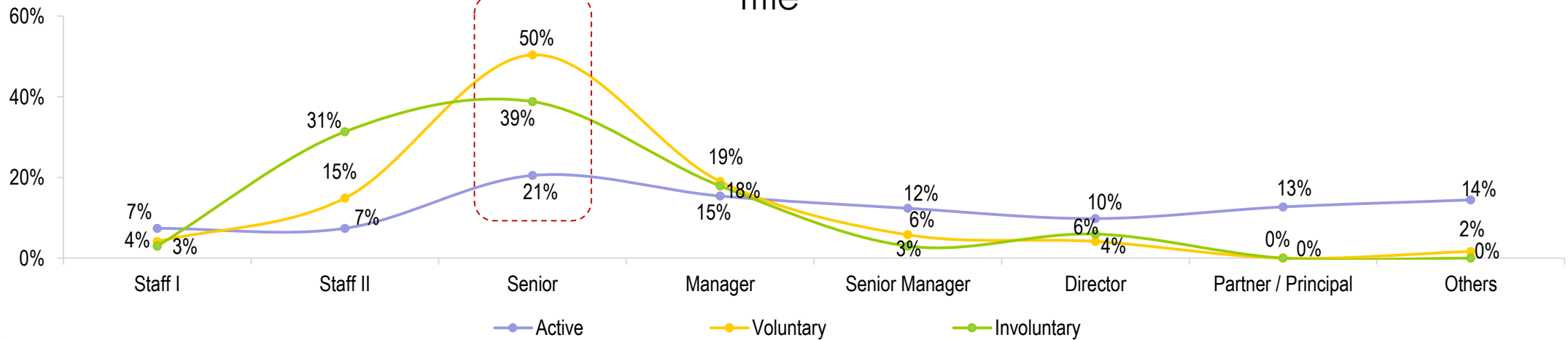


Who leaves SampleCo? 2017 Demographics: Separations vs. Active

Region

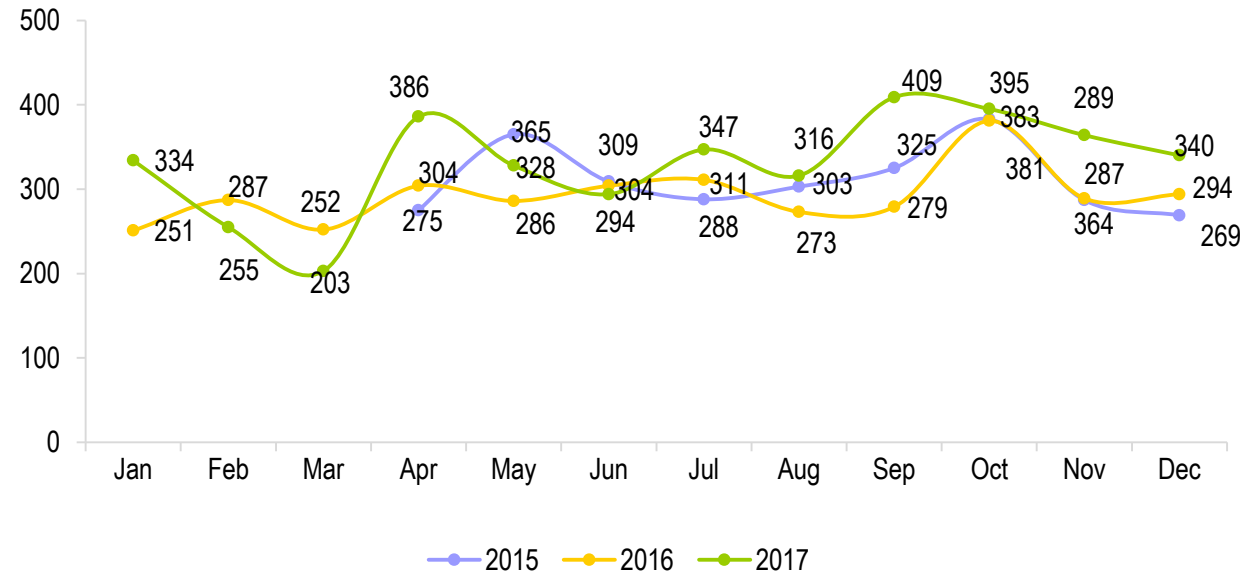


Title



When do they leave? Workforce Trends: Separations

Number of Voluntary Separations (Per Months)

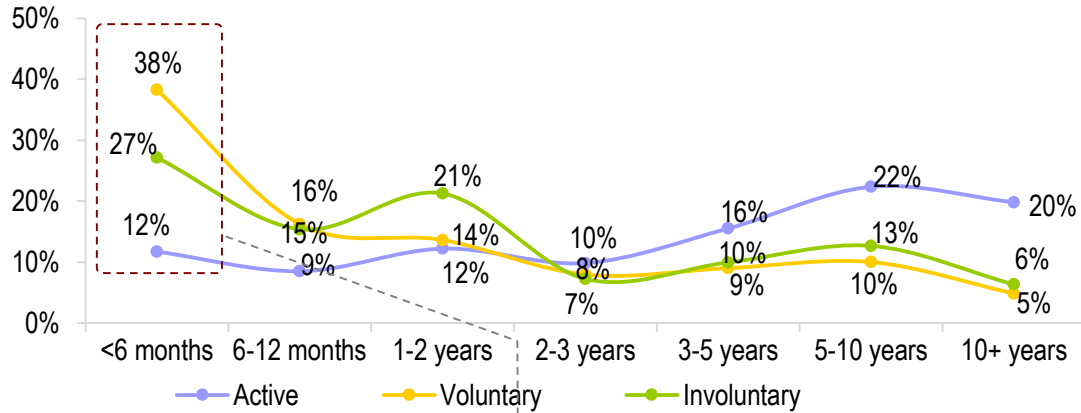


| TENURE (YEARS) | 2015 | 2016 | 2017 |
|----------------------------|------|------|------|
| Total Separations Mean | 2.22 | 2.38 | 2.43 |
| Total Separations (Median) | 0.83 | 0.83 | 0.83 |
| Voluntary Mean | 2.14 | 2.32 | 2.37 |
| Voluntary (Median) | 0.83 | 0.83 | 0.75 |
| Involuntary Mean | 3.09 | 3.08 | 3.11 |
| Involuntary (Median) | 1.17 | 1.25 | 1.17 |
| Active Population Mean | 5.67 | 5.80 | 6.14 |
| Active Population (Median) | 3.17 | 3.08 | 3.92 |

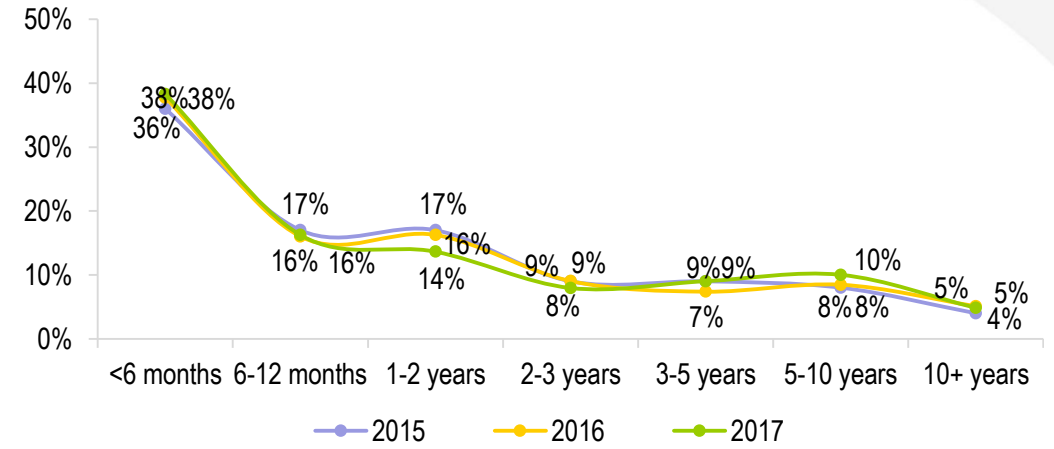


When do they leave? Workforce Trends: Separations

Tenure Distribution: Active vs. Separations



Tenure Map of Voluntary Separating Employees



Tenure Distribution of Voluntary separations followed the similar trends in the past 3 years.

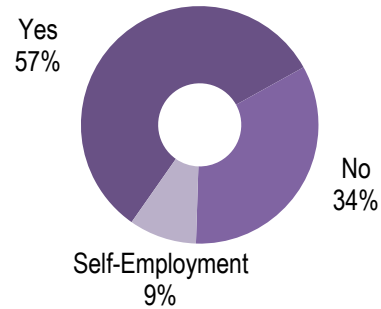
In 2017, employees with <6 months of tenure are more likely to leave because of:

1. Managers
2. Coworkers/peers

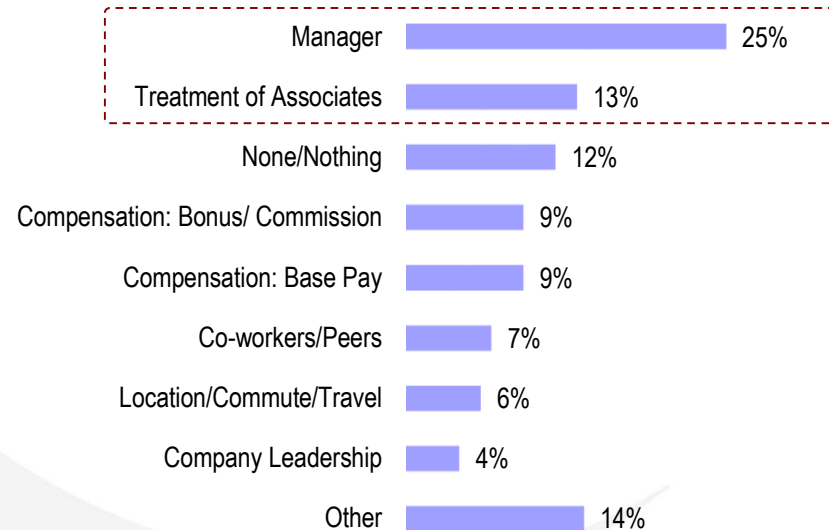


Where do they go? Separations by Competitor

Q8. Are you currently working at another company? (n=575)



Q6. For those who are not going to another company, their reasons for leaving are (n=119):



Q8a. What company are you going to (n=133)*

| | | |
|------------------------------|-------------------------|-------------------|
| Baker Tilly (2) | Ares (1) | EnTrustPermal (1) |
| PwC (2) | Blackstone (1) | Ernst & Young (1) |
| ABM (1) | Boen O'connor (1) | Goldman Sachs (1) |
| Accume Partners (1) | Broadridge (1) | Hertz Herson (1) |
| Anthony and Silven Pools (1) | CitiBank (1) | iCINS (1) |
| Apollo Global Management (1) | Cohen & Co. (1) | |
| Aramark (1) | Dime Community Bank (1) | |

**See slide 48 for the full list of companies*

* See Appendix (slide 46) for complete list of companies



Executive Summary: Positive & Constructive Themes

| Positive Themes | 2016 | 2017 |
|---|------|------|
| 1. Products/Services | ● | ● |
| 2. Client Contact and Nature of Work/Industry | | ● |
| 3. Location/Commute/Travel | ● | ● |

| Constructive Themes | 2016 | 2017 |
|-------------------------------------|------|------|
| 1. Overall Work Experience | ● | ● |
| 2. Communication | ● | |
| 3. Treatment of Associates | ● | ● |
| 4. Compensation: Base Pay and Bonus | ● | ● |
| 5. Company Leadership | ● | |
| 6. Policies/ Procedures | ● | ● |



Positive Theme 1: Products/Services

Employees are proud of the
Products/Services SampleCo
provide to customers.

29%

Selected as most liked
aspect.

↓ 7.0% (from 31.4%)

60%

Said no influence on
decision to leave.

↓ 3.8% (from 62.7%)

18%

Selected as reason to stay.

↓ 27.6% (from 25.5%)

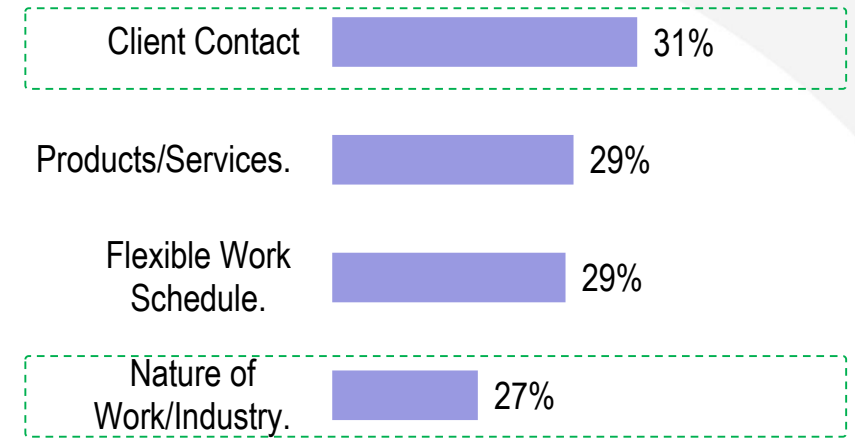
**Please refer to appendix (slide 38) for the detail numbers*



Positive Theme 2: Nature of Work and Client Contact

Separating employees enjoy the **Nature of Work**, and continue to value **Client Contact**.

As most liked aspect



55%

Said **Client Contact** had no influence on decision to leave.

↑ 12.0% (from 49.1%)

**Please refer to appendix (slide 38) for the detail numbers*

30%

Selected **Client Contact** as reason to stay.

↓ 18.9% (from 37.3%)

80%

Said **Nature of Work/Industry** had no influence on decision to leave or a reason to stay.

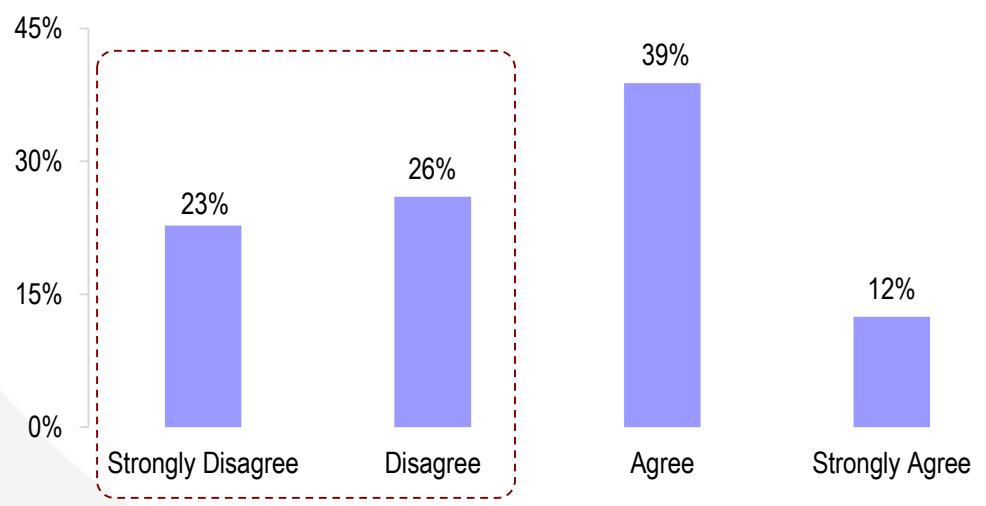
↓ 6.2% (from 85.2%)



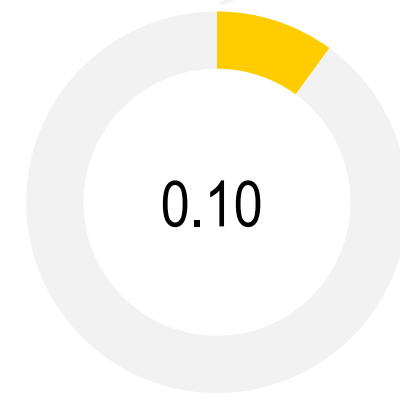
Constructive Theme 1: Overall Experience

Separated employee perceptions of the **overall experience** at SampleCo has decreased. And employees hesitate to recommend SampleCo as a good place to work.

Overall the working conditions in my department were positive.



**Please refer to appendix (slide 40) for the detail numbers*

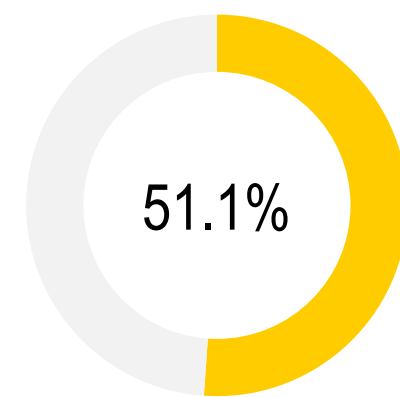


Net Promoter Score (NPS)

Q16: Would you recommend SampleCo as a good place to work?

NPS is calculated using the % of each answer choices, shown as below:

$$NPS = (Very\ Likely + Somewhat\ Likely) - (Very\ Unlikely + Somewhat\ Unlikely)$$

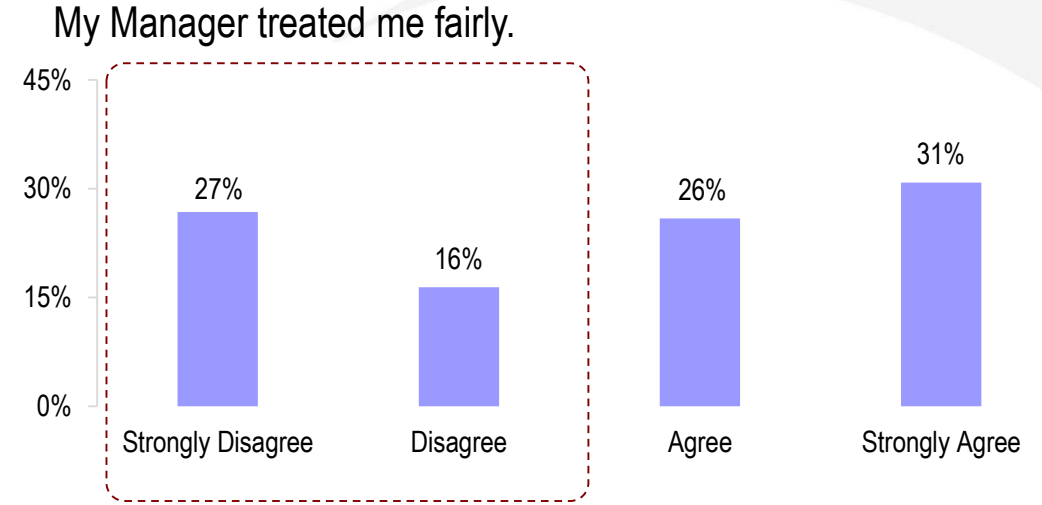


Would NOT consider returning to SampleCo in the future



Constructive Theme 2: Treatment of Employees

Treatment of Employees is considered the least liked aspect of SampleCo and is a primary driver of turnover.



43%

Select as least liked.

↓ 6.6% (from 45.7%)

58%

Said influenced decision to leave.

↓ 7.7% (from 62.8%)

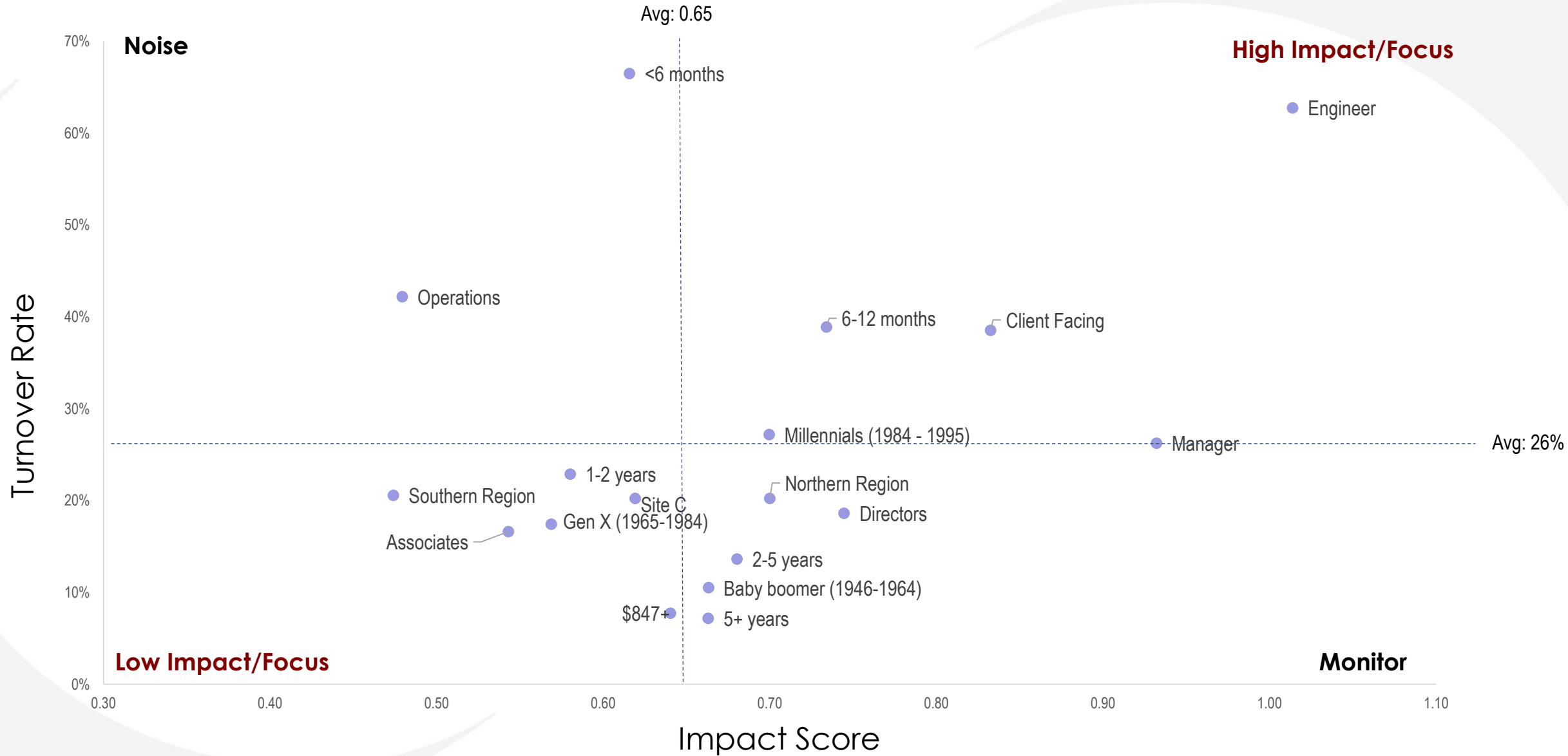
40%

Select as recommendations for improvement at SampleCo
↑ 4.6% (from 38.5%)

**Please refer to appendix (slide 42) for the detail numbers*



Turnover Impact Matrix: Treatment Of Employees



Reasons for Leaving by Line of Business

| Line of Business | REASONS FOR LEAVING | | | | | | Turnover Rate | Total Voluntary Separations |
|------------------|-----------------------------|---------------|---------------------|----------------------|-----------------------------|-------------------|---------------|-----------------------------|
| | Opportunity for Advancement | Communication | Supervisor/ Manager | Compensation: Salary | Training/ Prof. Development | Work-Life Balance | | |
| Production | 0.82 | 0.47 | -0.08 | 1.50 | 0.65 | -0.11 | 12.9% | 1047 |
| Corporate | 1.30 | 0.42 | -0.98 | 1.78 | 1.22 | -1.00 | 7.2% | 105 |
| Field Systems | 1.51 | 0.71 | -0.34 | 1.91 | 1.19 | 0.07 | 17.1% | 652 |
| Marketing | 1.60 | 0.91 | -0.04 | 1.66 | 1.42 | 0.40 | 10.3% | 1477 |

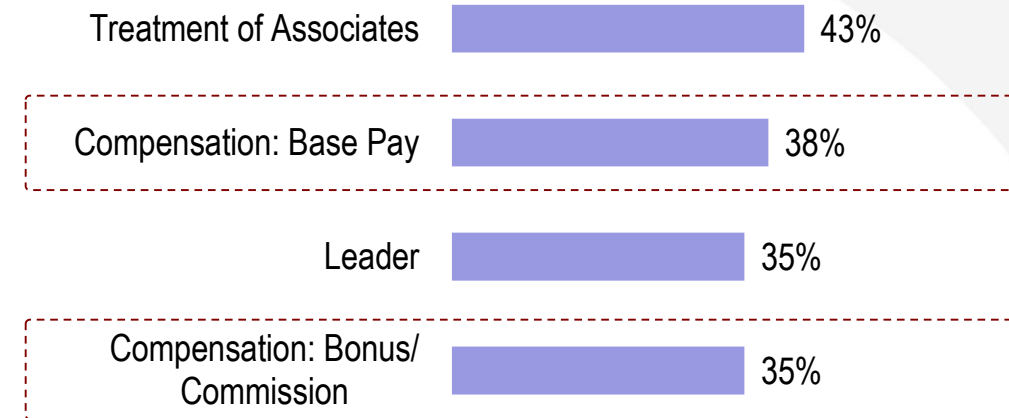
The above table indicates the degree to which each “Reason for Leaving” influences Turnover right now
Higher numbered “Reasons for Leaving” (Red) = Stronger driver of Turnover than lower numbers



Constructive Theme 3: Base Salary and Bonus/Commission

As least liked aspect at SampleCo

Employees are dissatisfied with their **Base Salary and Bonus/Commission**, and are leaving for better compensation elsewhere.



54%

Said **Base Pay** influenced decision to leave.

↓ 7.9% (from 58.0%)

**Please refer to appendix (slide 43) for the detail numbers*

49%

Said **Bonus** influenced decision to leave.

↓ 1.6% (from 50.0%)

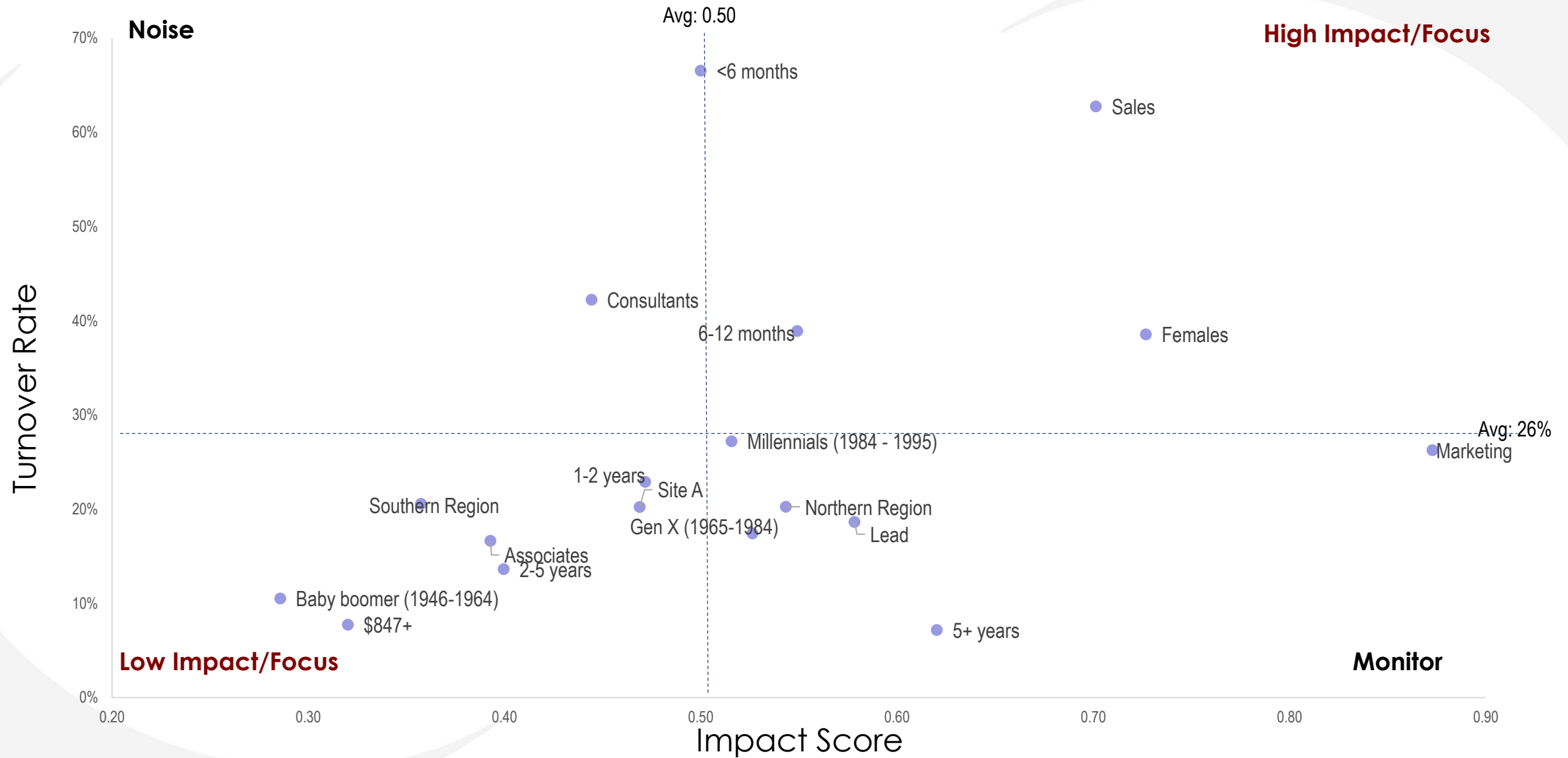
48%

Select **Base Pay** as recommendations for improvement at SampleCo.

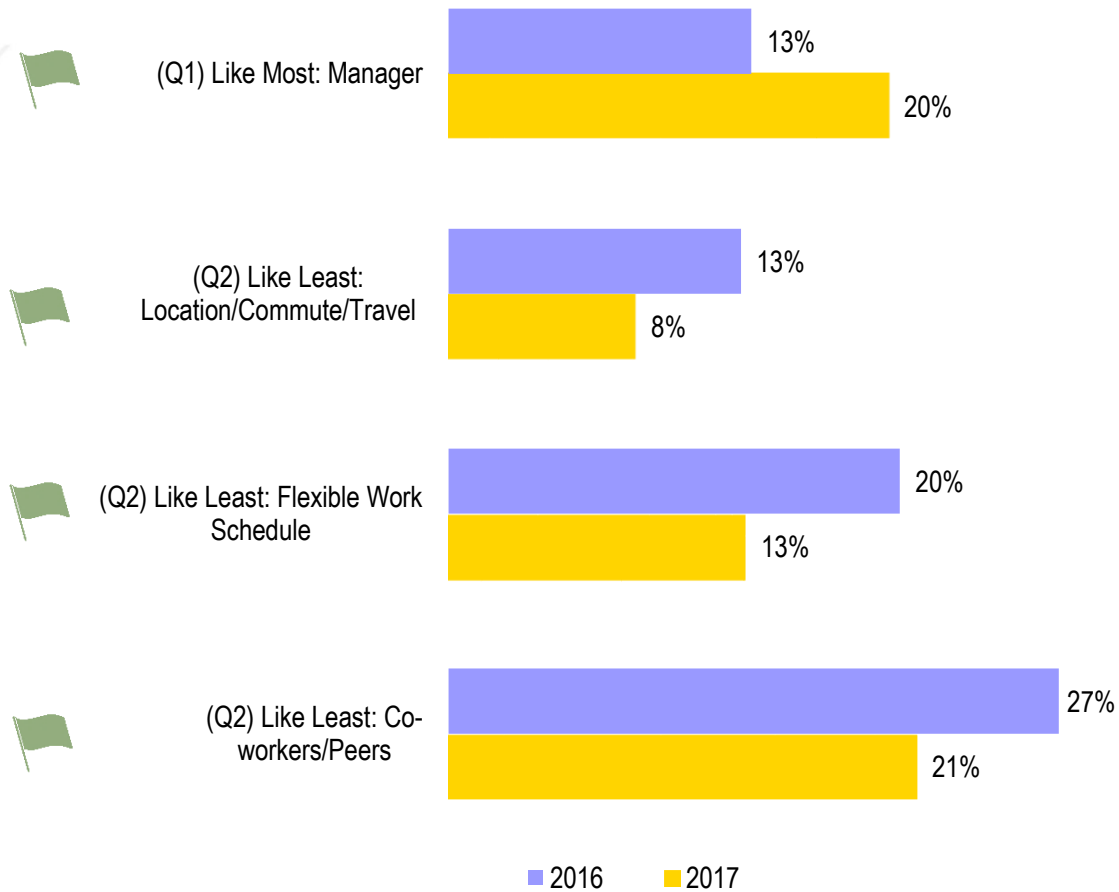
↑ 9.5% (from 43.8%)



Turnover Impact Matrix: Base Salary and Bonus/Commission



Significant Differences between Years: 2016 vs 2017



1. Employees who separated in 2017 (67%)* were significantly more likely to agree that their **Manager was accessible** than employees who separated in 2016 (59%) [Q9].
2. Employees who separated in 2017 (54%) were significantly more likely to agree that their **Manager helped them improve their performance** than employees who separated in 2016 (46%) [Q11].
3. Employees who separated in 2017 (20%)** were significantly more influenced to leave by **Company Mission/Goal** than employees who separated in 2016 (15%) [Q3g].
4. Employees who separated in 2017 (20%) were significantly more influenced to leave by **Nature of Work/Industry** than employees who separated in 2016 (15%) [Q4g].
5. Employees who separated in 2017 (21%) were significantly more influenced to leave by **Product/Services** than employees who separated in 2016 (12%) [Q5c].
6. Employees who separated in 2017 (20%) were significantly more influenced to leave by **Tools/Resources** than employees who separated in 2016 (15%) [Q5e].

* The percentage indicates the combination of Strongly Agree + Agree

**The percentage indicates the combination of Highly Influenced my decision to leave + Somewhat influenced my decision to leave



SAMPLE REPORT COMPLETE

FULL REPORT INCLUDES

25+ SLIDES



APPENDIX

QUESTION RESPONSES 2016 - 2017

1. WORKFORCE TRENDS: SEPARATIONS
2. 2017 DEMOGRAPHICS: COMPLETED EXIT INTERVIEWS
3. SEPARATIONS BY COMPETITOR
4. THEME SUPPORTING EVIDENCE DETAILS
5. COMPLETE QUESTION RESPONSES
6. SIGNIFICANT DIFFERENCES BETWEEN DEMOGRAPHIC GROUPS



Exit Interview Program Goals

1. To pinpoint reasons why employees leave SampleCo
2. To clarify strengths: What SampleCo does well in motivating and managing employees
3. To identify areas of improvement
4. To track separation trends/changes over time

Annual Advanced + Trend Analysis Goals

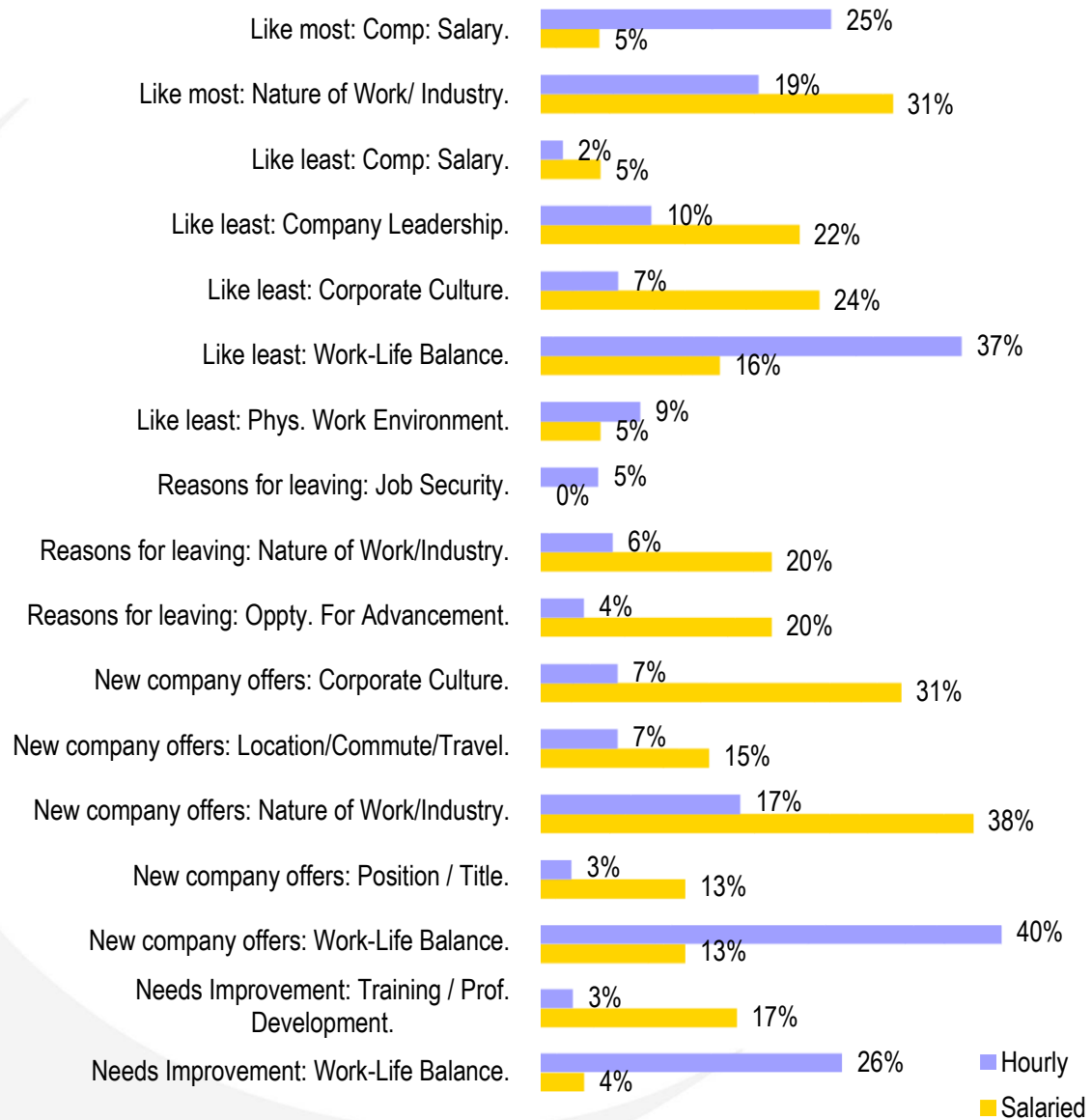
1. To analyze exit interview data from 2017, segmented to increase understanding
2. To identify **Positive** and **Constructive** themes in employees' perceptions of SampleCo through statistical analyses
3. To document consistencies and differences in employee perceptions over time
4. To make recommendations and predictions about future employee activity based on current interview data



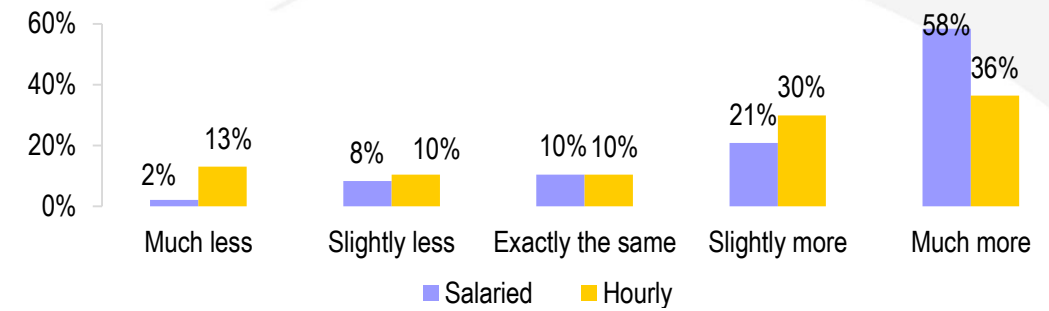
How do you retain employees?



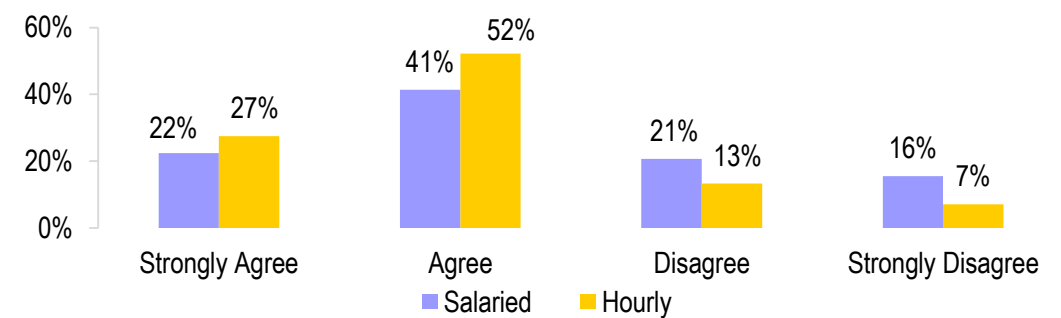
Significant Differences between Hourly and Salaried



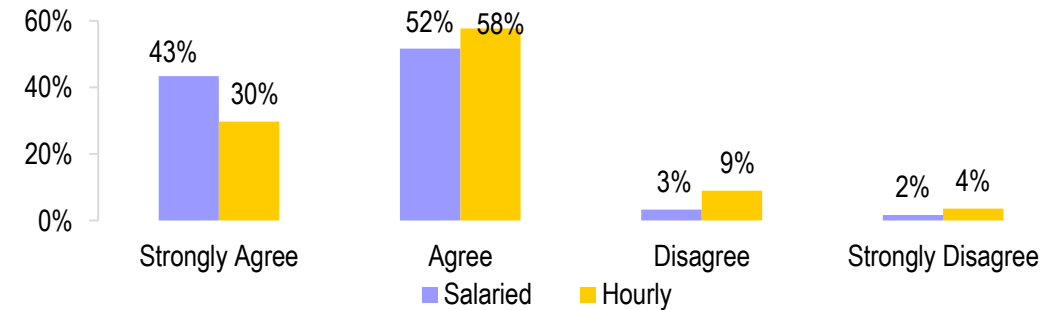
7. Compared to the job you are leaving, is your new pay:



15. My supervisor provided clear direction on work assignments.

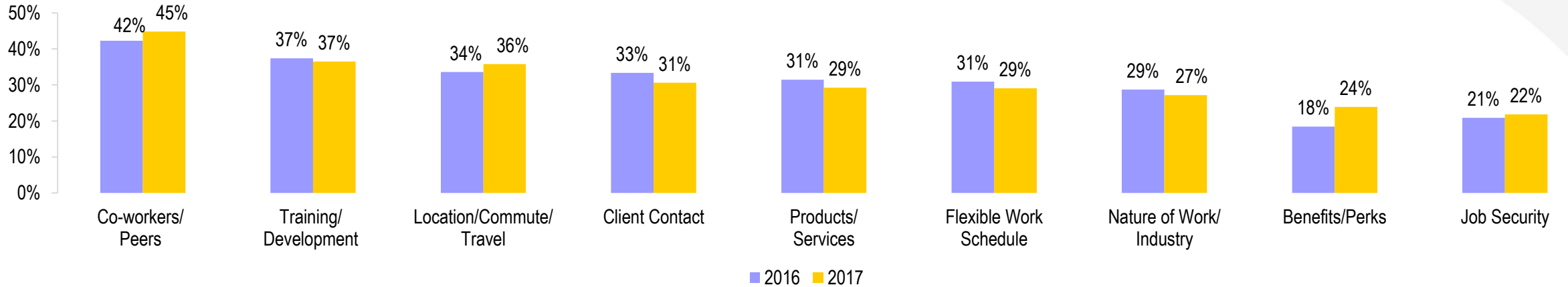


21. SampleCo provides high quality products & services.

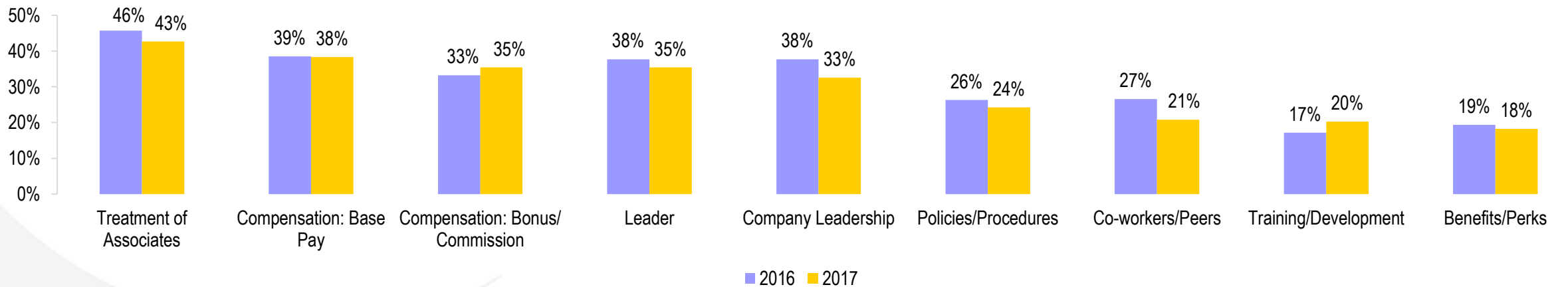


Organizational Perceptions

1. What did you **like most** about working at SampleCo ?

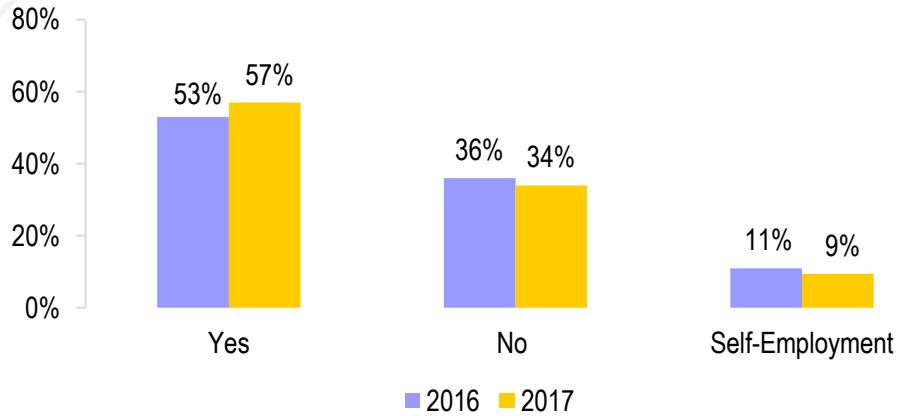


2. What did you **like least** about working at SampleCo ?

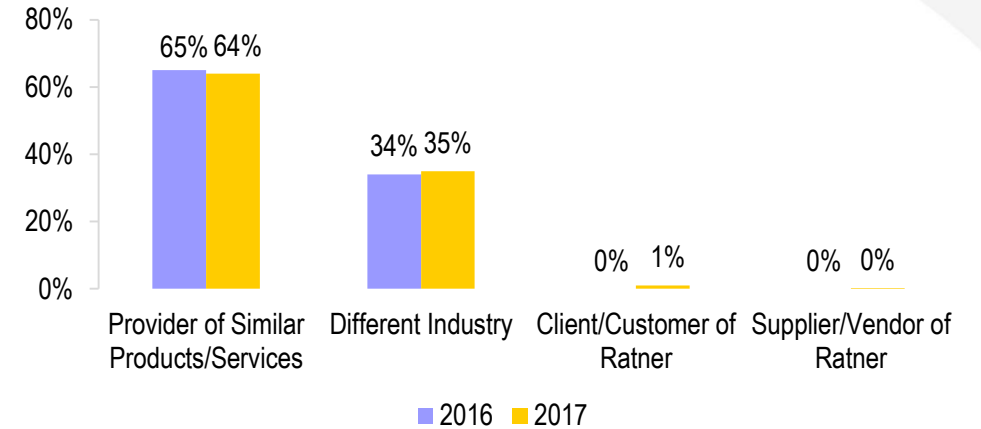


Competitors

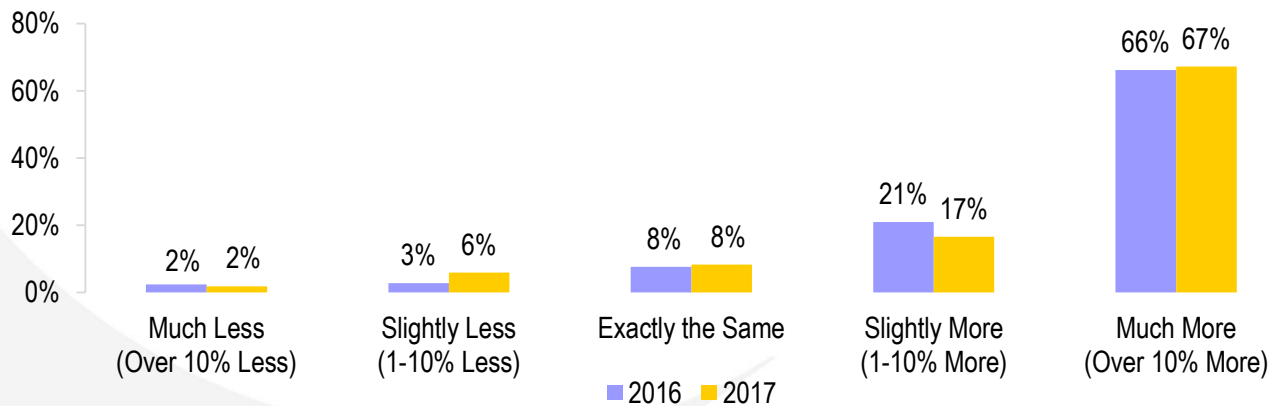
Q7. Are you currently working at another company?



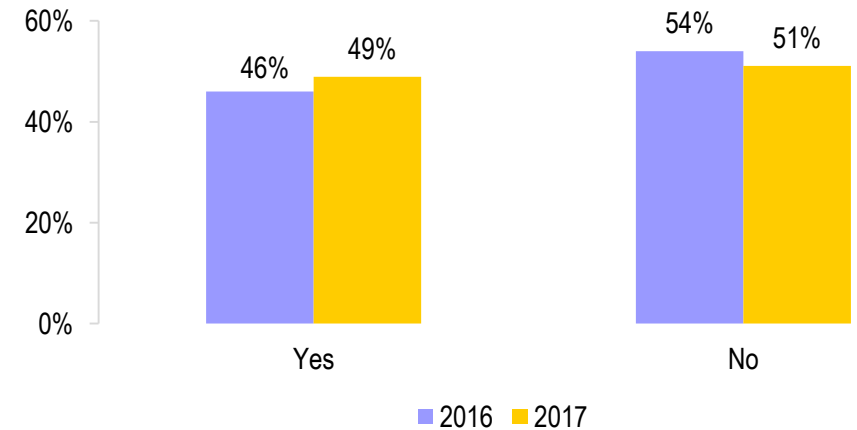
Q8. If Yes, Which of the following best describes your new



Q10. Compared to the job you are leaving, is your new pay:

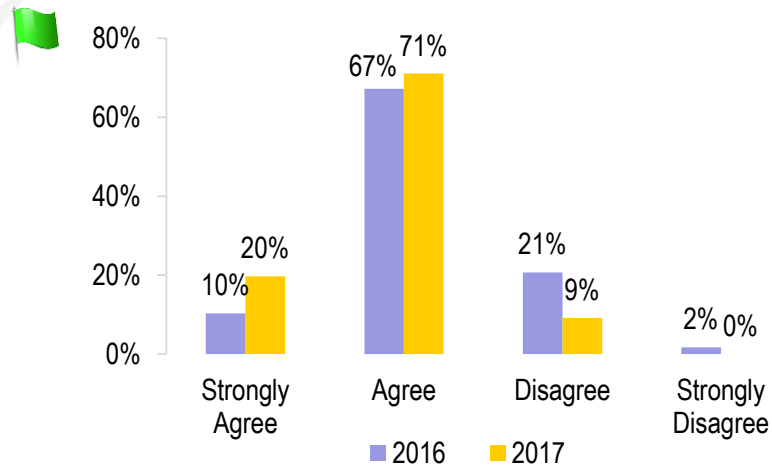


Q17. Would you consider returning to SampleCo in the future?

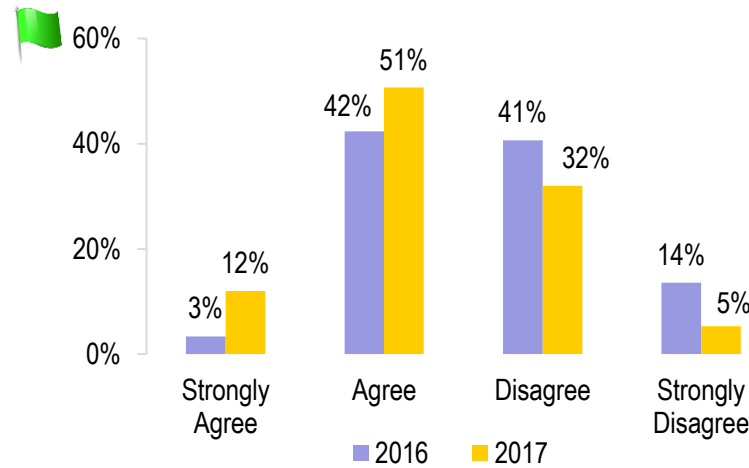


Significant Change between Years: 2016 vs. 2017

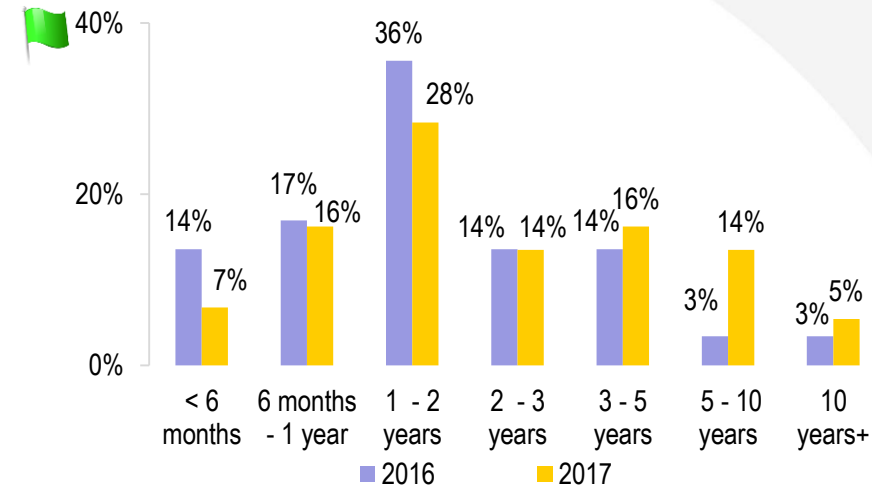
Q6: I know what is expected of me in order to do my job well.



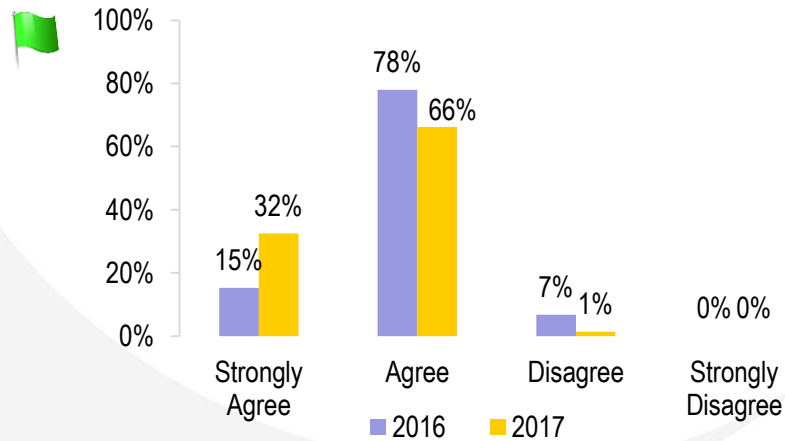
Q8: I have a clear career development path at ClientCo.



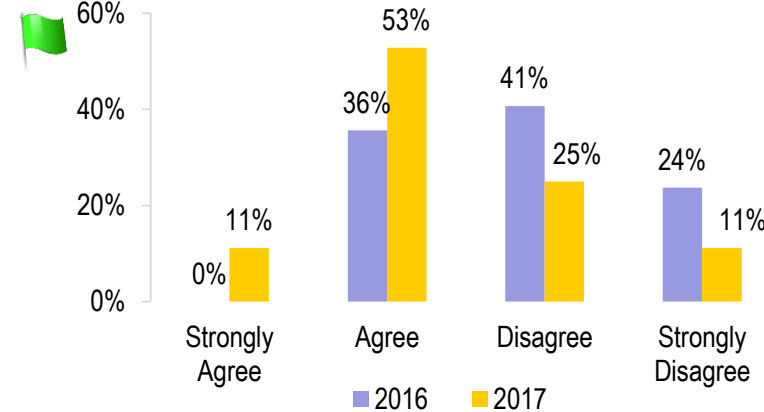
Q12: How much longer do you plan to be at ClientCo?



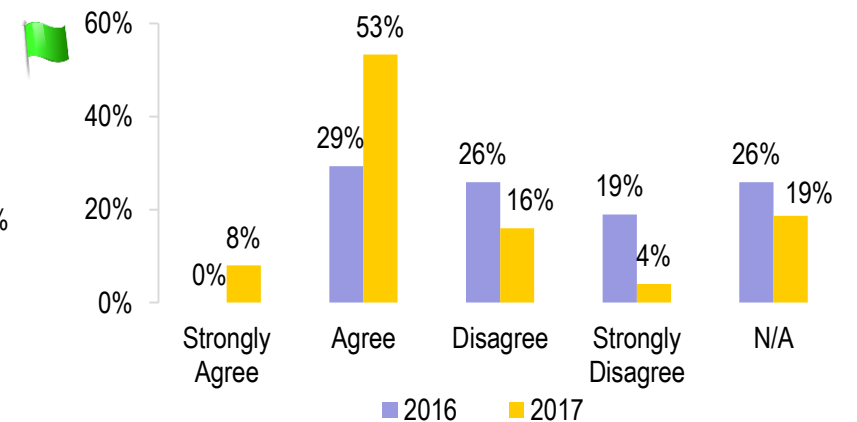
Q17: ClientCo delivers quality products/services.



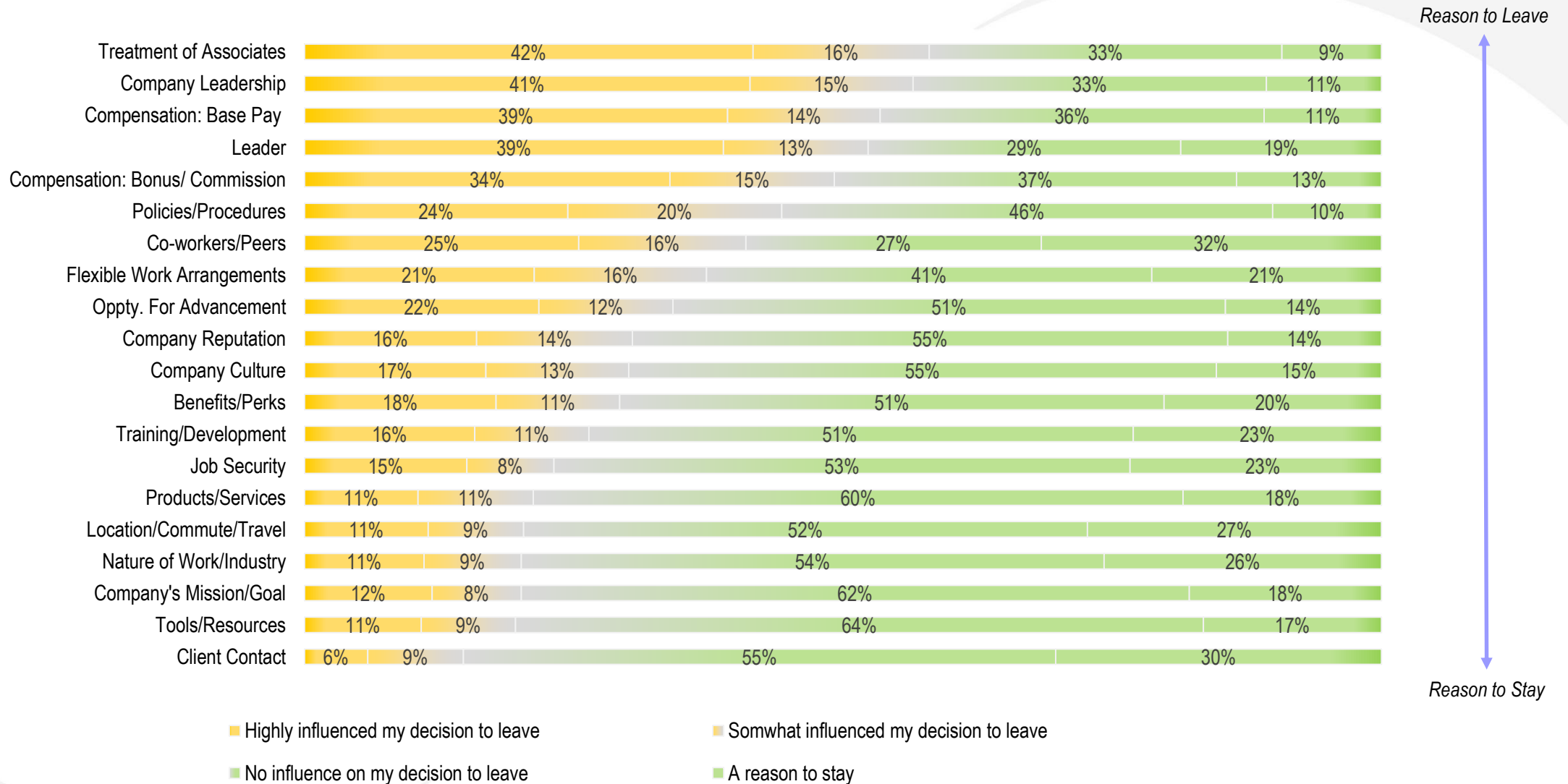
Q19: ClientCo effectively retains their best people.



Q20c: The salary increase processes are fair and equitable.

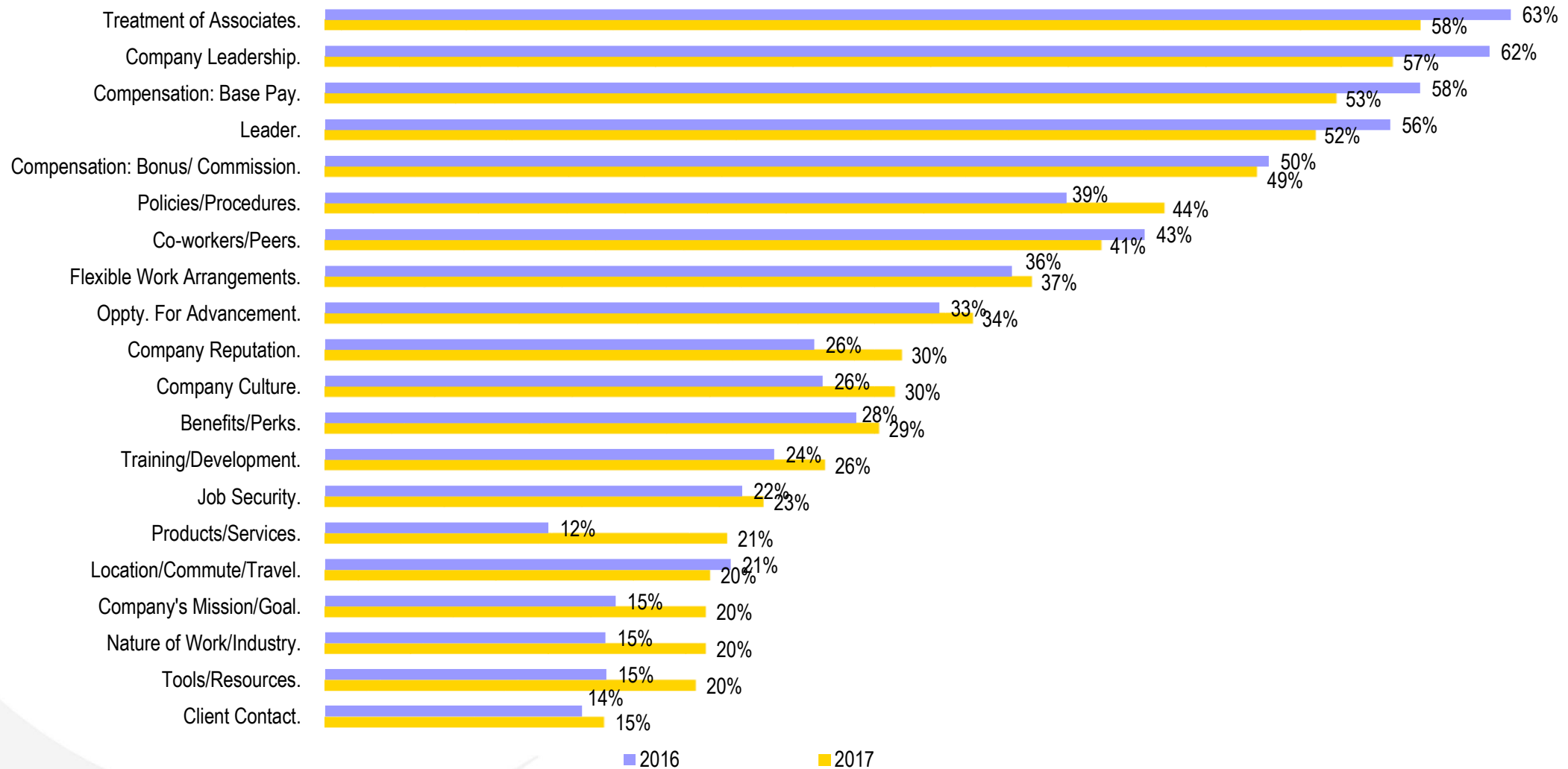


Reasons for Leaving 2017



Reasons to Leave/Stay

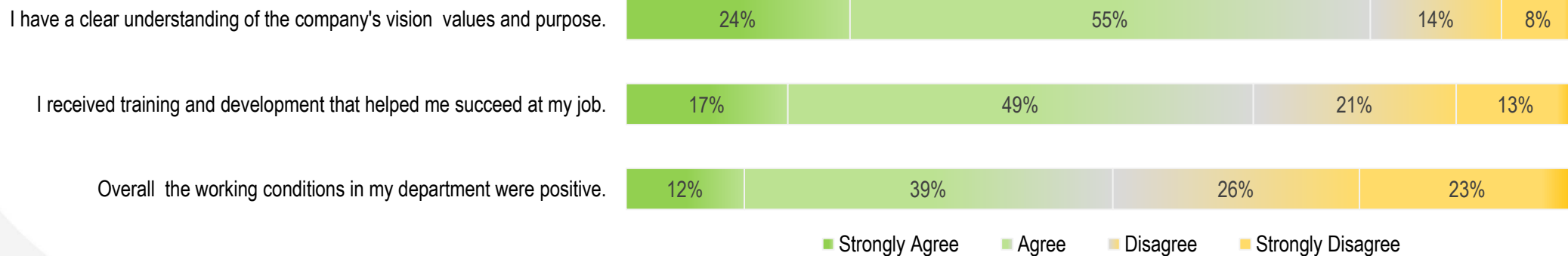
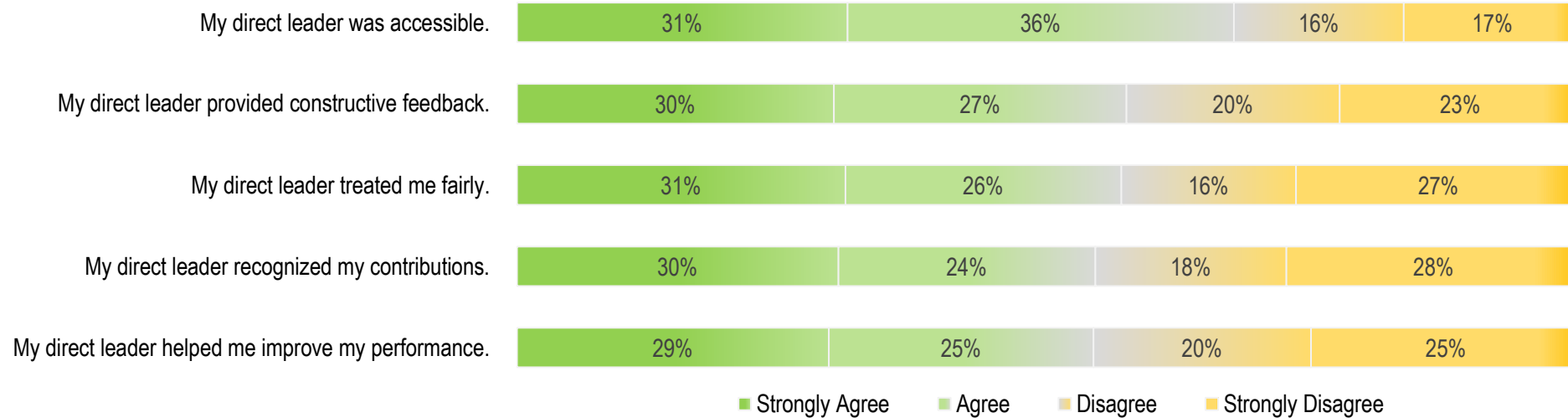
3. Aspects that influenced the decision to leave SampleCo



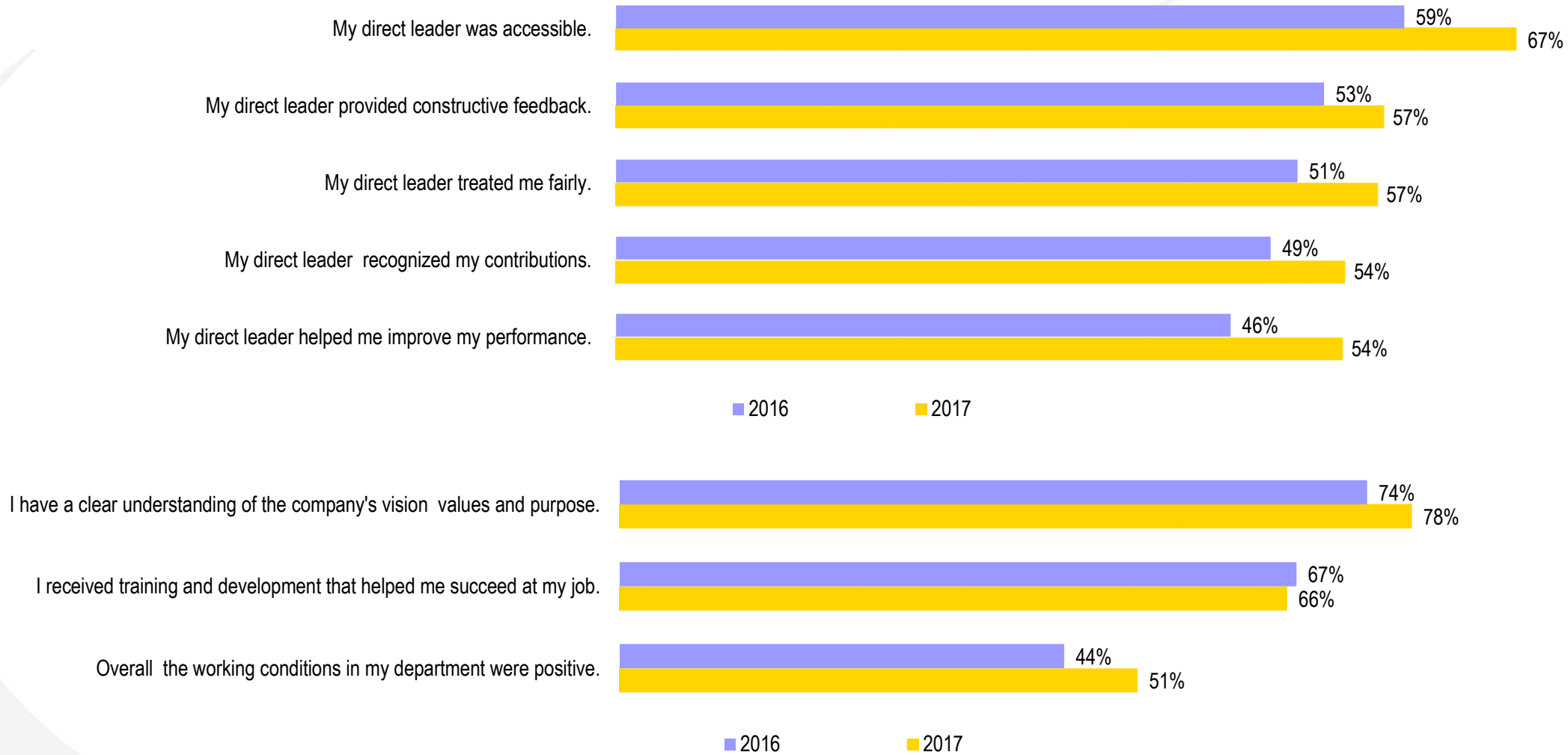
*The bar indicates the combination of Highly Influenced my decision to leave + Somewhat influenced my decision to leave



Supervisor/Manager Detail: 2017



Supervisor/Manager & Company Detail: 2016 vs. 2017

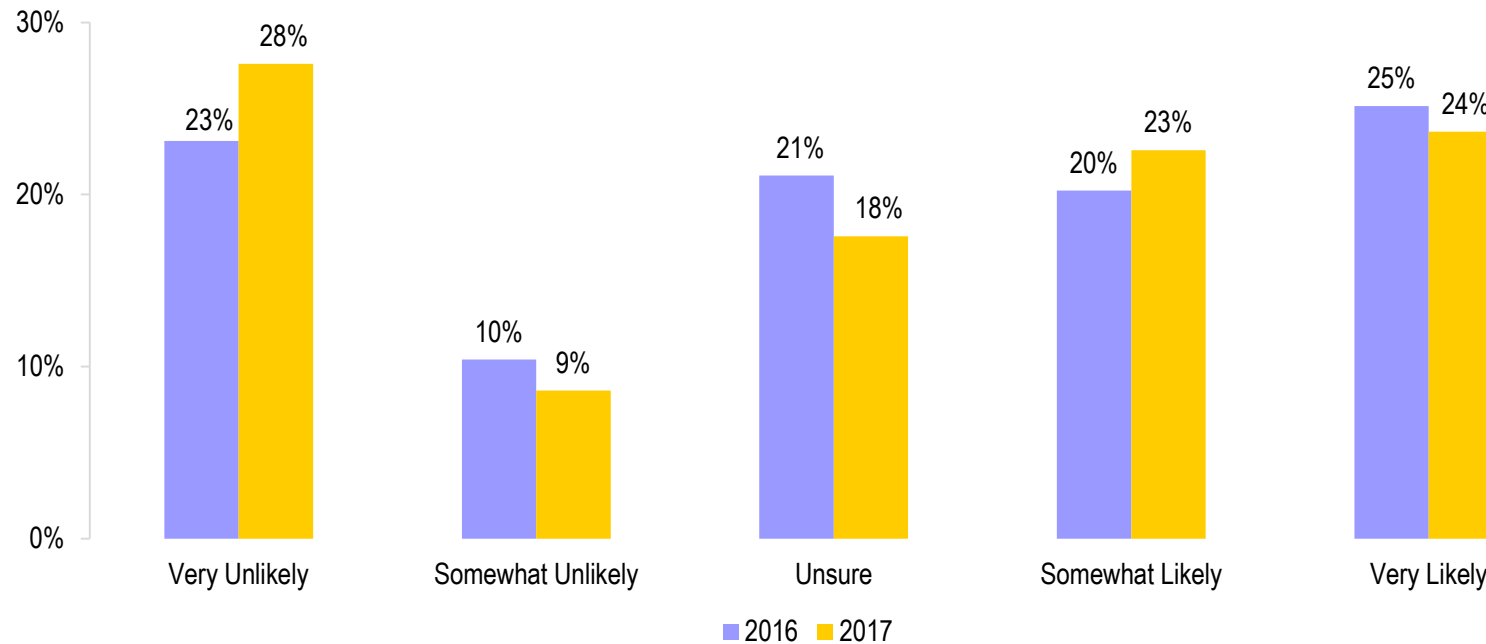


*The bar indicates the combination Strongly Agree + Agree



Organizational Perceptions: Employee Net Promoter Score

15. Would you recommend SampleCo to others as a good place to work? (eNPS Question)



Employee Net Promoter Score (eNPS):

Management tool used to gauge the loyalty of a firm's employees



SAMPLE APPENDIX COMPLETE

FULL APPENDIX INCLUDES




15+ SLIDES



THANK YOU



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-  **HR Metrics Dashboard**
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-  **Employee Retention Strategies**
www.retensa.com

