Workforce Retention Diagnostic

Leadership reflection and action checklist | Free resource

How to use

Review each prompt with relevant leaders and employee representatives. Mark each item **Established / Developing / Not yet established**. Record evidence rather than relying only on perception. This is an original leadership reflection checklist, not a validated psychometric instrument.

1. Understand the workforce

■ We can report voluntary and involuntary exits by role, tenure, location, and leader without compromising privacy.

■ We distinguish avoidable departures from expected or structurally driven turnover.

■ We examine early-tenure exits and critical-role continuity.

2. Listen and learn

■ Employees have safe, accessible ways to share concerns and improvement ideas.

■ Exit and stay conversations produce themes and documented follow-up.

■ Leaders compare listening themes with operational measures rather than relying on a single score.

3. Examine everyday work

■ Staffing and workload assumptions reflect actual demand and capacity.

■ Onboarding, scheduling, tools, and handoffs are reviewed for preventable friction.

■ We understand where manager practices affect support, development, and trust.

4. Connect experience to performance

■ We distinguish direct turnover expenditures from capacity or contribution at risk.

■ Financial assumptions are role-specific and reviewed with finance.

■ We examine potential downstream service and customer effects without claiming causality.

5. Act and sustain

■ Each priority improvement has an accountable owner, timeframe, and leading indicator.

■ We test changes on a manageable scale before broad rollout.

■ We revisit results and employee feedback, adjusting interventions when evidence changes.

30-day leadership commitment

Priority problem: _____

Evidence and baseline: _____

Action / owner / due date: _____

Measure of progress: _____

Responsible use

Do not use this checklist to rank individual employees or diagnose a workplace without appropriate evidence. Protect confidentiality and seek multiple perspectives.

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