

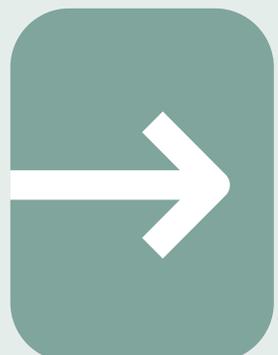
Exit Interviews are so last year

Don't wait until your
employees leave to find out
what what mattered most!



Have a Care Conversation now to retain talent!

- Open 2-way dialog
- Understand deposits & withdrawals for each employee's **Emotional Bank Account**
- Make deposits to keep a positive balance
- Engage & retain your team



Care Conversation Discussion Guide

1

What is a Care Conversation?

A Care Conversation is a semi-structured, one-on-one conversation between an employee and his/her direct manager, designed to assess and improve employee engagement and retention. The goal is to better understand what motivates each individual employee and what could cause them to explore opportunities outside of the company. When we ask, we don't have to guess and we may be able to take action to retain great talent before it's too late. You can use Care Conversations broadly for all your employees or focus on individual team members who may be at a higher risk of leaving.

Why Now?

Most businesses around the world have experienced a significant spike in attrition since the beginning of 2021. The pandemic triggered employees to re-evaluate their priorities and drove them to seek new opportunities that offer more meaningful purpose, personalized development, genuine appreciation and authentic human connection.

If we want our employees to stay with us, we must understand their needs on an individual level and create an engaging culture that fulfills their personal and professional priorities.

IN THIS DISCUSSION GUIDE

Care Conversation Tips & Best Practices

Sample Care Conversation Questions

Action Planning Guide

Emotional Bank Account Balance Sheet

Questions? Contact your HR Manager or Erika@UpstreamHR.com



Care Conversation Tips & Best Practices

2

Set the Stage

- Don't make it a surprise
- Be transparent & explain why - 1:1 or in a team meeting
- Ask for reactions & suggestions
- Plan for 45-60 minutes
- Invite employees to choose discussion topics
- Schedule & send questions in advance – allow time to prepare

Make it Personal

- Target a “semi-structured” feel
- Select/send questions in advance
- Face-to-face or video
- Leave time between meetings to take notes & process
- Practice empathetic listening
- Seek to understand risky withdrawals and meaningful deposits for each individual

Not a One-Time Event

- Gauge the Emotional Bank Account balance constantly
- Keep track of understand recent deposits & withdrawals
- Infuse Care Conversation questions into ongoing 1:1s
- Ask new questions each time
- Hold Care Conversations 1-2X/ year ... not just when risk is high

Take Action

- Bring items to closure through coaching or manager action
- Create a Care Plan or each person:
 - Understand risky withdrawals and mitigate when necessary
 - Create a “menu” of meaningful deposits and reference that list each time you need to make a deposit ... don't wing it!

Care Conversation Discussion Questions

3

As you prepare Care Conversation questions, be sure to align them to The Engagement Ladder – the four major drivers of employee engagement:

- Leadership communication
- Relationships
- Development and growth
- Recognition

Choose 6-8 questions that work best for you and each employee. You might consider offering the entire list of questions to your team members and asking them to highlight the questions they would most like to discuss.

Leadership Communication

- What elements of our strategy/ direction are clear to you? What's unclear & how can I provide clarity?
- Where do you think you can offer the greatest value to our team or business? Where are your skills not being fully utilized right now?
- How would you describe your contribution to our purpose & goals?
- When have you felt most connected to the Company strategy? Least?
- How would you rate the level of transparency at [Company]? On which topics do you expect to receive more information?

Development & Growth

- On a scale of 1 to 5, how satisfied are you with:
 - Development opportunities?
 - Helpful insights & feedback?
- When have you felt most supported in your development? Least?
- How often do you prefer to receive insights and feedback?
- What new skills or experiences would you like to gather?
- What assignment would you tackle if you knew you wouldn't fail?
- Where do you want to be in 5 years?
- How can I best support your growth, development & career?

Care Conversation Discussion Questions

4

Relationships

- How are you feeling right now?
- What makes you feel most fulfilled?
- When have you felt most connected to me as your leader? Disconnected?
- When have you felt most connected to our team? Disconnected?
- How can you & I better connect and communicate?
- When have you felt most balanced? Least balanced?
- How can I better support your balance & well-being?
- What can I do more or less of to better support you – personally or professionally?

Recognition

- What type of recognition resonates most with you? Least?
 - Words of affirmation
 - Acts of service (help & support)
 - Quality time (1:1 or team)
 - Tangible gifts
- When have you felt most appreciated? Unappreciated?
- When have you felt most “heard?” Least?
- What ideas do you have that have not been considered or heard?
- How can I help ensure that your ideas are heard in the future?

Care Conversation Discussion Questions

5

General Deposits & Withdrawals

- What inspires you to do your best work?
- What aspect of your job or the Company do you wish you could change?
- What makes for a great day? A bad day?
- What motivates you and gives you energy?
What drains you?
- When did you last lose sleep because of work?
What caused your concern?
- When was the last time you thought about leaving? What prompted it? Does that still concern you? How could I help to resolve it?
- What makes you stay at [Company]? What can I do to amplify that?
- What would make you consider leaving [Company]?

Care Conversation Action Planning

6

What's Next?

After holding Care Conversations with all your direct reports, spend time reflecting on the insights you gathered. You may find common themes across team members, in which case you can plan collective actions that will positively impact the entire team. More importantly, utilize Care Conversation insights to create a list of **Meaningful Deposits** and **Risky Withdrawals** that is uniquely tailored to each person.

Reference that personalized list of deposits and withdrawals often to proactively manage the Emotional Bank Account, making deposits and mitigating withdrawals as needed to maintain a positive balance.

Emotional Bank Account “Balance Sheet”

Employee Name	Deposits	Withdrawals
	Past deposits	Past & Anticipated Withdrawals
	Current Balance: <input type="checkbox"/> Highly Engaged <input type="checkbox"/> Slightly Disengaged <input type="checkbox"/> Actively Disengaged	
	Planned deposits	
Employee Name	Deposits	Withdrawals
	Past deposits	Past & Anticipated Withdrawals
	Current Balance: <input type="checkbox"/> Highly Engaged <input type="checkbox"/> Slightly Disengaged <input type="checkbox"/> Actively Disengaged	
	Planned deposits	
Employee Name	Deposits	Withdrawals
	Past deposits	Past & Anticipated Withdrawals
	Current Balance: <input type="checkbox"/> Highly Engaged <input type="checkbox"/> Slightly Disengaged <input type="checkbox"/> Actively Disengaged	
	Planned deposits	

You will find an Emotional Bank Account balance sheet template on pg. 7-8

Questions? Contact your HR Manager or Erika@UpstreamHR.com



Emotional Bank Account Balance Sheet

Employee Name	Deposits	Withdrawals
	Past deposits	Past & Anticipated Withdrawals
	Current Balance: <input type="checkbox"/> Highly Engaged <input type="checkbox"/> Slightly Disengaged <input type="checkbox"/> Actively Disengaged	
	Planned deposits	
Employee Name	Deposits	Withdrawals
	Past deposits	Past & Anticipated Withdrawals
	Current Balance: <input type="checkbox"/> Highly Engaged <input type="checkbox"/> Slightly Disengaged <input type="checkbox"/> Actively Disengaged	
	Planned deposits	
Employee Name	Deposits	Withdrawals
	Past deposits	Past & Anticipated Withdrawals
	Current Balance: <input type="checkbox"/> Highly Engaged <input type="checkbox"/> Slightly Disengaged <input type="checkbox"/> Actively Disengaged	
	Planned deposits	



Emotional Bank Account Balance Sheet

Employee Name	Deposits	Withdrawals
	Past deposits	Past & Anticipated Withdrawals
	Current Balance: <input type="checkbox"/> Highly Engaged <input type="checkbox"/> Slightly Disengaged <input type="checkbox"/> Actively Disengaged	
	Planned deposits	
Employee Name	Deposits	Withdrawals
	Past deposits	Past & Anticipated Withdrawals
	Current Balance: <input type="checkbox"/> Highly Engaged <input type="checkbox"/> Slightly Disengaged <input type="checkbox"/> Actively Disengaged	
	Planned deposits	
Employee Name	Deposits	Withdrawals
	Past deposits	Past & Anticipated Withdrawals
	Current Balance: <input type="checkbox"/> Highly Engaged <input type="checkbox"/> Slightly Disengaged <input type="checkbox"/> Actively Disengaged	
	Planned deposits	

