Needs Assessment Report

Project: New Supervisor Training
Sponsor: Daniella Stricks, Vice President of Field Operations, Bookends Booksellers
Date: July 5, 2021

Background
In April of 2021, Daniella Stricks requested an assessment be performed to determine the best way to prepare new supervisors to successfully manage their stores. Across the company, employee engagement scores have been steadily declining for the past two years and staff turnover is high. Store managers are responsible for the hiring, training and supervision of all staff in the stores. There has not been any formal training offered to new store managers in the past, and they often have no prior supervisory experience, as they are usually hired into staff positions with prior sales experience and then promoted into managerial positions.

Purpose
The purpose of this assessment is to determine how the company can accomplish the following:
- Increase employee satisfaction
- Decrease staff turnover due to dissatisfaction with supervisors or work climate
- Decrease recruitment costs by making better hiring decisions
- Set employees up for success through measurable training results

Conclusions
To accomplish these goals, the following actions are proposed:
- Revise store hiring processes to integrate an initial round conducted by HR Talent team
- Outsource training design to company's L&D team; "certify" managers in regional areas as facilitators through a Train the Trainer program
- Provide new supervisors with training on how to manage others
- Integrate responses to employee engagement survey into manager's performance review
- Provide external coaching to managers scoring 3 or lower on their performance reviews
- Share exit interview data with senior leadership team on a quarterly basis

Analysis Methods
The following data collection efforts were involved in this assessment:
- Interview with VP of Field Operations
- Interviews and focus groups with store employees and store managers
- Focus groups with regional managers
- Review of customer comments from past six months
- Review of employee engagement surveys from past four years
- Review of exit interview data from past two years

Results of Analysis

1. Analysis of Exit Interview Data – A review of exit interview data for fiscal year 2021 shows a new job as the number one reason for leaving the organization. It is expected that some of the people leaving for a new job did so because they were not happy with the work environment or with their relationship with their supervisor. 62 people indicated work environment (32) or relationship with supervisor (30) as their primary reason for leaving.

Chart Title

New job: 98
45
42
Work environment: 32
30
15
Other: 20
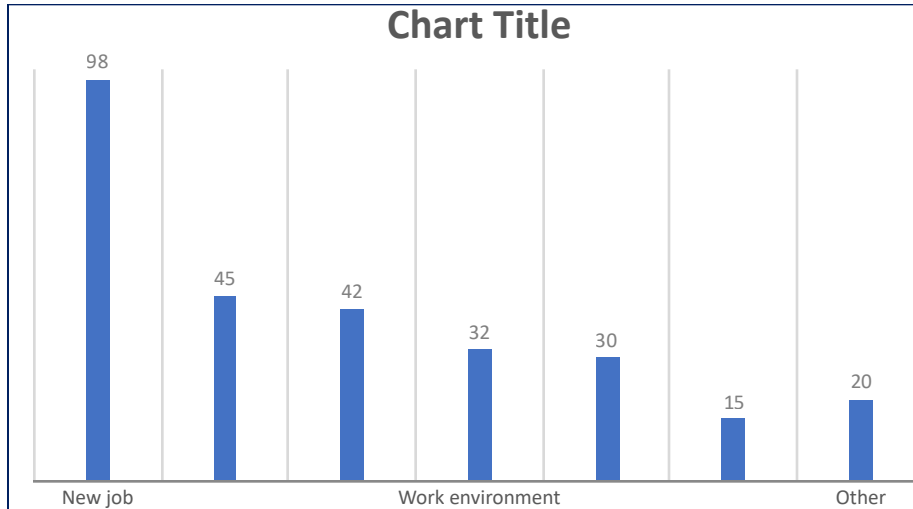
2. Review of Employee Engagement data – A few questions on the employee engagement survey were highly correlated to the question "I am looking for another job," including not being treated fairly, not receiving regular feedback, and not receiving support or tools needed to do their job. In addition, even those who would recommend their workplace are not recommending their bosses.

	Strongly disagree	Disagree	Neutral	Agree	Highly agree
I am treated fairly	60	340	300	250	50
I receive support and tools	13	101	367	400	119
I receive regular feedback	112	496	278	101	13
I am looking for another job	234	544	100	88	34
I would recommend my workplace	34	188	381	297	100
I would recommend my boss	48	300	289	265	98

3. Interview and Focus Data Group – Interviews and focus groups resulted in a prioritization of key factors influencing performance and of recommendations for addressing these factors.

- What would allow you to do your best work?
  - My supervisor trusts me
  - Autonomy and flexibility to do my work how, where, and when I want to
  - More communication from my manager / on my team

- What issues are you facing as a new supervisor that you could use support with?
  - Managing people who used to be my peers
  - Performance management
  - Running efficient meetings
  - Communication
  - Flexing my leadership style for different people

Recommended solutions

To increase employee engagement and reduce turnover, the following solutions are recommended:

Interventions	Cost estimate	Time estimate
1. Revise store hiring processes to integrate an initial round conducted by HR Talent team	n/a	4 weeks
2. Outsource training design to company's L&D team	n/a	2-4 weeks
3. Certify managers in regional areas as facilitators through a Train the Trainer program	n/a	4-6 weeks
4. Provide new supervisors with training on how to manage others	TBD	8 weeks
5. Provide external coaching to managers scoring 3 or lower on their performance reviews	TBD	2-4 weeks

Evaluation Plan

To evaluate the effectiveness of these solutions:
- Conduct evaluation of hiring process with new employees.
- Track number of new hires coming off of probation after six months on the job.
- Have those in Train the Trainer program deliver a mock training.
- Provide new supervisors with a series of case studies related to managerial best practices to verify acquisition of these practices.
- Monitor goals and performance of those entering a coaching relationship before, during, and after coaching.

Appendix

The following data are included as attachments to this document:
- Tables of employee engagement survey data
- Tables of exit interview data
- Detailed summary of interviews and focus groups