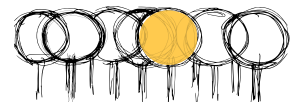




# THE EMPLOYMENT JOURNEY

Let's choose your HR adventure

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*see the forest for the trees*



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# WHY IS THIS FOR YOU?

## SECTION 01

You are seeking a guide that will provide you with some quick wins and clarity, without having to sit through a boring webinar or workshop. A level of clarity that cuts through the overwhelm like an 'aha' moment, where it all clicks.

### **You need this guide because you fall into one of these groups:**

1. You are tired of training people for them to only walk out the door less than 2 years later. The way you used to operate doesn't seem to be working anymore.
2. Being an employer and leading teams is new to you and let's be honest: you're busy and there aren't many training options that allow you to learn on the fly.
3. You report to the Managing Director or General Manager; people have been leaving and things need to change. You have some ideas but the thought of making these changes is overwhelming.

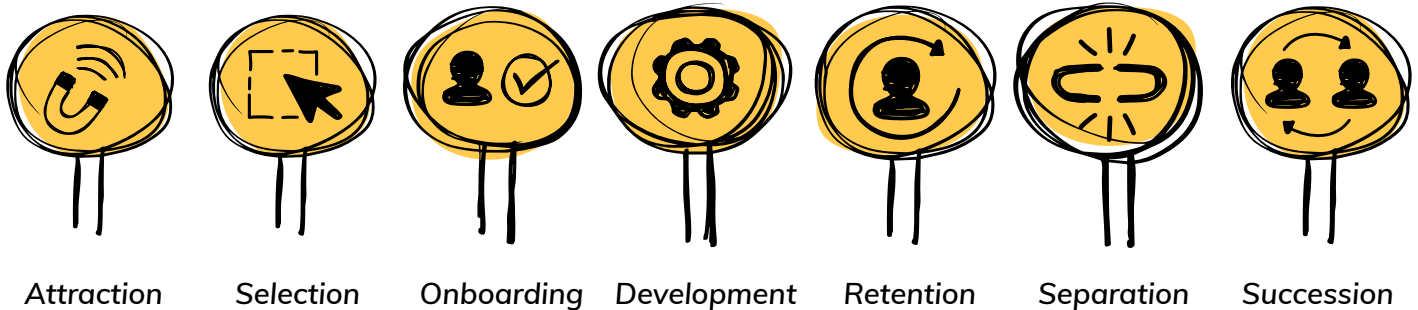
Irrespective of which group you relate to, I want to let you in on a well-known secret in human resources: successful workplace relationships and businesses are usually the result of small things being executed well, and the underlying processes that allow these small things to happen with minimal effort. That's right, it can happen with minimal effort. All these small things build into something that is quite wonderful, adding value to people's lives and the business' bottom line.

### **So how about you join us on a journey?**

# THE EMPLOYEE JOURNEY

## SECTION 02

The employee journey will look a little different for each individual, but it largely follows a predictable pattern through these stages:



Below you'll find a little story illustrating the importance of having good HR foundations and building employee trust at each stage - we'll then go on to dig more in depth into each of the stages above.



This journey begins with your employees: let's call them Donald and Susan. A client testimonial catches Donald's eye while scrolling through his news feed. Meanwhile, Susan is searching Seek and your job advert catches her eye. Donald happened to come across the same job advert later in his news feed. They both think 'I want to work there'. There is an **ATTRACTION** and they soon make contact by submitting their applications.

You are diligently working through your **SELECTION** process for the two vacancies - an accountant and a customer services officer. Donald and Susan's applications are standouts but there are others who also stand out. How to choose the right one? They all look good on paper.

As shortlisted candidates, they work their way through a series of stages filtering out those who don't meet your criteria. The reference checks are done and they get that all important job offer phone call. Donald and Susan are over the moon to have been selected and offered the roles.

The paperwork arrives, and they quickly flick through all the important details and put pen to paper. Donald and Susan are serious about

embarking on a journey with you. You feverishly begin preparing for their first day and they anxiously wait for that first day, unsure whether it will be exciting or a heart dropping reality check. The first few months of **ONBOARDING** will quickly show whether you were transparent with Donald and Susan during the recruitment process or if it was all a sales pitch. Conversely, you'll also be assessing Donald and Susan. Are they really as capable as they claimed, and can they work well with you and the rest of the team?

By the time onboarding is finished up, you all know where you stand on areas for **DEVELOPMENT**. Donald and Susan won't learn everything about the job, the team and your business in the first 3 months, no matter how fast they hit the ground running. Their performance and execution will get better as time goes on. How long it takes for their performance and execution to improve largely depends on the expertise and skills they already have, plus the support they get from you. Donald's role as Customer Service Officer, has prescribed training modules that he is working through. During his trial period, you could see that he is on track to be capable and proficient within 12 months. On the other hand, Susan the Accountant has a lot to learn and work through. After

a planning session with you, it is clear that it will take Susan about 15 months for her to feel comfortable and on top of things.

Susan and Donald are doing great and have hit all their milestones. It wasn't easy, especially for Susan. But after 18 months, you can see the work is just happening. Susan is getting quicker at the reporting and Donald is more confident answering the more challenging customer queries. They are both good employees you need to keep. Losing them now would mean all that hard work recruiting and training them was for nothing. Your conversations with them now are about **RETENTION** and developing strategies to keep them for as long as possible.

Another year flies by; your retention strategies have paid off. Well, mostly. Donald has just asked to have a meeting with you out of the blue. He has to move to be closer to his older parents. They are not doing so well and he is the only one in NZ who can help them. There is nothing you can do, as you don't have an office nearby and he can't work remotely in a different role. You begrudgingly start the **SEPARATION** process.

What's Susan up to? She's doing great and seeking out challenging projects. At her last performance review, Susan shared with you that she aspires to be the

Finance Manager. You are aware that Joe, the current Finance Manager, has retirement on the horizon. You start to talk with Joe and Susan about a likely **SUCCESSION** plan. But Susan doesn't have it in the bag. The business strategy is about aggressive growth. If it all happens as planned, both Susan's and Joe's jobs could change.

The Finance Manager job that Susan had been preparing for has changed. The Finance Team is bigger than it once was all those years ago when Susan first started. The job is advertised externally but Susan is encouraged to apply.

After a lengthy selection process and anxious wait, Susan is appointed as the Finance Manager and later the role evolves into a Chief Financial Officer. The Employee Journey continues as she starts learning about the Finance Manager role, as though she is a new employee all over again, but with a whole new perspective.

Meanwhile you hear every so often from Donald, and how he is going. Yesterday, you were pleased to read in a LinkedIn notification that he is now a Customer Services Manager. Out of the blue, you get a message from Donald. He thinks his colleague, Julian, would be a great fit for a business analyst job he saw advertised. Turns out Julian is a great fit and is appointed. His out-of-the-blue message saved you thousands in recruitment fees and time.

The Employee Journey is not a theory with little connection to real life. This is what actually happens - I know this because I use it and have seen it in action again and again. But this journey cannot be implemented without trust.

**"Trust is not fluffy. Trust is hard, messy work and it definitely and absolutely affects the bottom line." – Tracey Olivier (Leadership Coach)**

Trust is what really makes the employee journey work. Making an effort to develop trusting workplace relationships, openly sharing knowledge and allowing for initiative, this can lead to an easier and quicker transition from onboarding to development, or development to retention stages.

With that in mind, we're ready to go to our tips (and your to-do list) to make sure you work with fewer Donalds and more Susans.



You know that you're going to have a new role opening up in the business in the next few months, but you're not looking just yet.

**Do you decide to trust that the right candidate will find you when the time comes?**

**Do you decide to proactively seek out ideal candidates?**



NZ is in the midst of a skills shortage. The pandemic is likely to make it worse too, if borders don't open up anytime soon. Candidates have options, and the best candidates are always on the lookout. There may be fewer jobs advertised, but businesses are still looking for the best candidates, and the right offer could be enough to prompt a candidate to make a move.

## Candidate Attraction: Marketing in Disguise

You want to get your brand out there in front of candidates before they are ready to move, so that when they see a job advert, they already know your business and what you stand for as an employer. Your employer brand matters.

Whether they're actively looking for work or not (yet) doesn't matter. You want them to take notice and remember you.

***"You'll attract the employees you need if you can explain why your mission is compelling: not why it's important in general, but why you're doing something important that no one else is going to get done." – Peter Thiel***

Your attraction strategy needs to spring from your answers to these questions:

1. **Your Key Message** - What is it about you, your team and your business that would compel people to leave their current job to join you? Or why do they want to leave their current job?
2. **Your Ideal Audience** - Who is your ideal candidate or group of people that you want more than anyone else?
3. **Your Target Audience** - Where are these people working, what are their career goals and what are their interests?
4. **Your Point of Difference** - What is it going to take for you to be memorable?

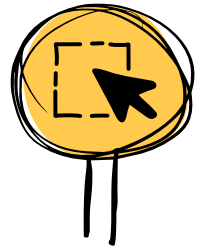
A good marketer will tell you that you can't rely on one method of advertising. Same applies for candidate attraction and recruitment advertising. Make sure you act in light of the answers above so you can get noticed and persuade your ideal candidates to act.

It's time to seek out and select the perfect candidate.

Hopefully they'll be closer to a Susan than a Donald.

***Do you choose to go in with a thoughtful recruitment game plan?***

***Do you decide that if it's meant to be, the right candidates will come to you?***



Congratulations, your attraction strategies have worked! You have received applications and candidates are ready and waiting for news about their application. Will they be the one?

I find the best ways to describe your ideal selection process is that it's like gathering together all the jigsaw pieces: you need to build a complete picture. Within that picture you can see the candidate's potential to do the work, how they work within your team, and more importantly you get a sense of whether you can trust them.

Trust your gut instincts. If it doesn't 'feel' right or you have a little voice that doesn't quit, listen to it. Then:

1. Ask yourself why you're unsure or questioning this candidate's capability?
2. Arrange for more interactions with the candidate(s), so you can put that voice to rest or understand why it's there.

Remember: you are in control of the process. If you need to do more than the one standard interview, then do it. If you want to do a skill test... do it. Psychometric and skills testing is underrated in my opinion.

Looking back to some memorable 'bad hires' that didn't work out within the 1-2 years, I can usually trace it back to a piece of information or that niggly feeling that something wasn't right - or even worse, steps had been skipped. I trust that niggly feeling now.

Candidates can have that niggly feeling too. They are checking you out and want to make sure they are making the right decision. A good amount of discussion should be had between candidates and employers, to make sure everyone's expectations can be met.

Recruitment is a costly exercise, even if you get it right the first time. It is also one of the most life changing things you can do for yourself, your team and the successful candidate. An average recruitment project can take between 20 – 25 hours to execute from start to end. To find out what that means for you, calculate what your time costs are. Then add between \$800-\$1,200 for advertising.



**Don't waste that precious time - try these recruitment tips instead:**

- 1. First impressions really count.**

Everything you do for candidate attraction and during the recruitment process needs to be reinforced in every other aspect of the employment relationship from now on.
- 2. Ever hired a mate or family friend thinking it would work out great?**

Before you consider skipping steps: would you rather spend \$3,500 to \$5,000 on a good recruitment process or have to invest your time fixing \$10,000+ worth of employee mistakes and trying to rebuild a fractured team?
- 3. Before you advertise, get your candidate shopping list sorted.**

Be clear on what you are looking for in your ideal candidate. Your shopping list should consider attributes, expertise, knowledge and skills for the role now and how you foresee it evolving in the near future.
- 4. Put a recruitment game plan together before you start.**

Remember to consider the candidate's experience when planning your next recruitment process. Too long and they get frustrated. Too quick and they feel rushed into a decision.

***"Engaging the hearts, minds, and hands of talent is the most sustainable source of competitive advantage." – Greg Harris***

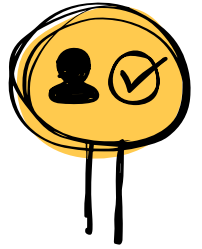
# ONBOARDING

## SECTION 05

Your new employee has just arrived and is getting settled in - they seem pretty happy!

**Do you decide to leave them to their own devices unless they seem to need help?**

**Do you choose to check-in with them in a structured manner over the first few weeks?**



Today, Susan arrives for her first day feeling confident and prepared. What might her first day look like?

Susan arrives at reception at 8.30am with no one to greet her. She wasn't told when to start, so she went by the times in her employment agreement. Susan is led to her new office, which has almost no stationary and a computer that's not quite set up. During an introductory briefing, Susan finds out she has to use her personal phone for work. This was not explained beforehand or mentioned in the employment agreement.

How do you think Susan felt in those first few hours of her new job? This is a real life experience a new employee recounted to me and I have never forgotten it. But it doesn't have to be like that. Susan's onboarding journey could look something like this:

1. Susan gets a call a few days before she starts, to confirm her start time and what she can expect in the first few days. She has a chance to ask about parking and appropriate work attire.
2. Susan turns up at 9.30am as previously discussed and is greeted by HR or her manager on arrival. She's shown to her workspace. She's shown where to find things in the kitchen, where to find the toilets and what to expect regarding breaks and lunches.
3. Susan and her manager spend a good hour talking through the work planned and what to expect over the next few days, weeks and months. Susan's computer, work phone and desk are all sorted, and waiting for her, and during the day people introduce themselves to her in the corridor.

## The Practical Magic of 7-7-7

Of course, onboarding goes far beyond an employee's first day. A senior executive introduced me to the concept of 7-7-7 several years ago, and I have applied it in onboarding and development ever since.

There are 3 phases, each with its own focus. You have to work through each phase to ensure the success of the onboarding and development of a new team member.

### 7 days

**You have 7 days to introduce yourself, your work style and your vision to your new employee.**

You work hard to get to know them and check in that they're keeping up with the information overload. They have the chance to get to know you too. You explain to them your vision and how they fit into the bigger picture. Your conversations are about what you expect them to contribute, how success will be measured and their views on this, to confirm you are on the same page.

### 7 weeks

**You have 7 weeks to ensure that they have a good understanding of their job and expectations.**

They are establishing routines and behaviours during this time - you want to make sure these align with the team culture and business practices. If they don't align, you bring this to their attention respectfully, as you don't want to prevent them from using his initiative and creativity. It is key that you bring them back to the expectations you set during those first 7 days.

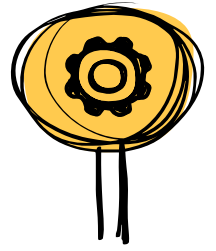
Learn about the third 7 as we move on into the Development phase.

**"Always treat your employees exactly as you want them to treat your best customers." – Stephen R. Covey**

Your new employee has mastered the basics and is settling into a routine.

**Do you decide to explain to them all the different avenues that their job might take?**

**Do you decide to introduce new aspects of the job in a gradual, staged manner?**



Remember the 7-7-7 rule from the onboarding phase? The last part of that formula comes in the Development phase.

## 7 months

You have 7 months to make sure they are delivering on your expectations, demonstrating the right behaviors and developing good working relationships with their peers and customers.

**“Before you become a leader, success is all about growing yourself. After you become a leader, success is about growing others.”**  
– Jack Welch, former GE Chief Executive

A typical induction process lasts about 90 days, but I like the 7-7-7 rule because it's proactive, and the shorter time frames of 7 weeks and 7 months keeps you honest on progress.

Create micro-learning moments. This could be as simple as explaining that the report format is presented in a certain way based on requests from the Board, or as complex as progressively introducing them to new software and their core job process each week. Don't try to teach them everything they need to know within the first week or month. Break it down into relevant, manageable chunks.

**“Someone is sitting in the shade today because someone planted a tree a long time ago.”** – Warren Buffett

As you near the end of the first year, the honeymoon period will be over. There will be mistakes, assumptions, errors. Address issues within 24-48 hours. Talk about what has happened openly and work towards resolving the problem without negativity or animosity. Then ask them to reflect on what could be done differently next time. Reflection is the key to learning.

**“As long as they are well-intentioned, mistakes are not a matter for shame, but for learning.”** – Margaret Heffernan, entrepreneur, CEO, writer and keynote speaker



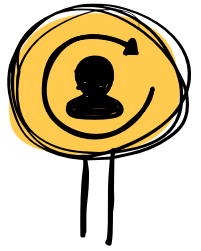
# RETENTION

## SECTION 07

The new hire has been with you for over a year. They seem to have a firm grasp of their role and responsibilities.

***Do you choose to leave them be and focus on others who are more immediately demanding?***

***Do you take steps to help them grow and evolve their role?***



Employees are always learning and growing. Most of them want to be better and do better, and most importantly have purpose. Give them a reason. A vision.

***“If you hire people just because they can do a job, they’ll work for your money. But if you hire people who believe what you believe, they’ll work for you with blood and sweat and tears.” – Simon Sinek***

This is where the magic really happens. All that time and money you have invested should be paying off now. There is no set list of actions or processes that you must follow to guarantee your employee sticks around, but there is more talk about their goals and passions, and their vision for their work or the team.

Their horizon is no longer weeks or a few months. They’re looking at 6-12 months and beyond. There is also talk about personal life goals and aspirations, and how these may influence their professional life.

***“If you want to keep your people – especially your stars – it’s time to pay more attention to how you design their work” - Harvard Business Review***

Of course, a business can’t just change a role to suit everyone. Doing that for every job or employee could bankrupt the business, turn customers away or add extra costs, affecting profitability. However, you can be strategic about this. You will obviously be more willing to flex for your star employees as opposed to poor performers.

Your retention strategies will be specific to your business and your employees, but here are a few cost-effective ideas and quick wins you could consider for your retention strategies, just for starters:

1. Hold regular monthly performance catch-ups and have more formal 1 on 1 planning sessions each quarter or biannually
2. Have a career development and succession plan for everyone
3. Consider offering 1 day off work to celebrate their birthday or for participating in a community event
4. An allowance of 20 hours per year to study or to develop a life interest
5. Offer medical or life insurance as an employee benefit

***“Research indicates that workers have three prime needs: Interesting work, recognition for doing a good job, and being let in on things that are going on in the company.” – Zig Ziglar***

# SEPARATION

## SECTION 08

Your employee has decided to move on, after a long and successful stint with your business.

***Do you help them transition, knowing they could refer excellent candidates in future?***

***Do you decide to devote your energies elsewhere, as they're leaving anyway?***

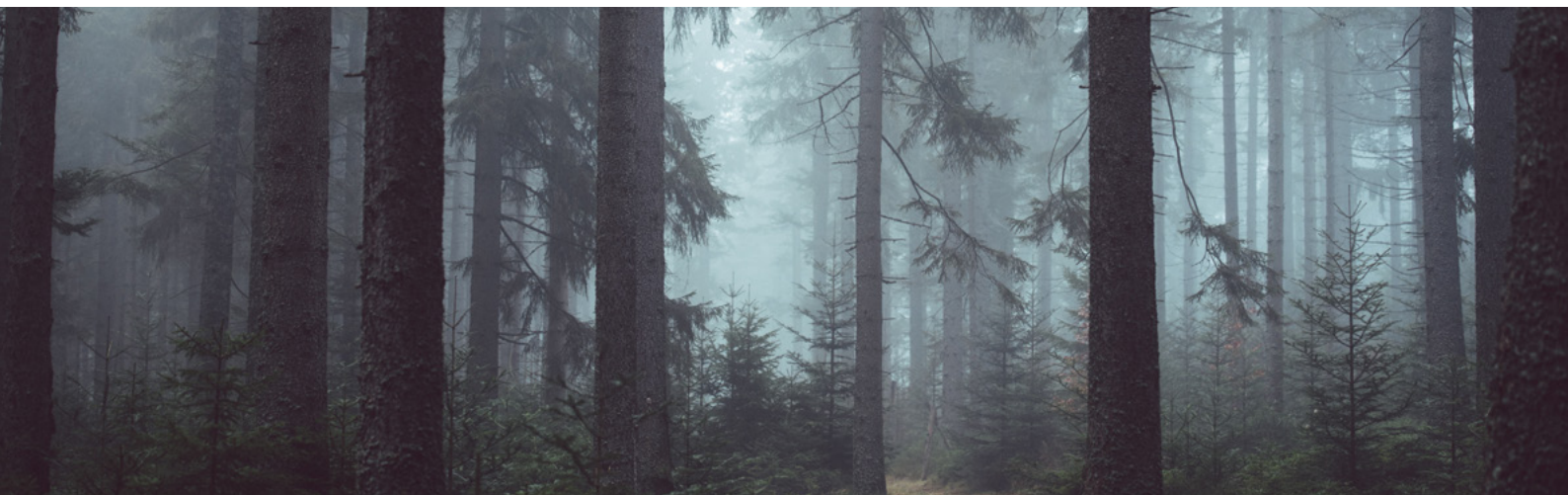


Know when to hold 'em and when to fold 'em. Irrespective of how amazing an employee may be, the time will come for them to continue on a new path forward. When this moment arrives, act with respect and tact. After all your employees, past and present, are a source for referrals.

As Michelle Obama famously said: "If they go low, we go high". This is no more important than at the time of professional separation, especially if the termination wasn't initiated by them; dismissal and redundancy are very hard. Follow your process. Be prepared to go high and be supportive.

As soon as an employee hands in their resignation, you have to find a way to extract as much knowledge and intellectual property as you can from them, as quickly as possible. The more information you have to share with the person stepping into his shoes, the easier the transition is for the team.

So how exactly do you respond to that resignation letter on your desk? First thank them for their time with the team, and be supportive and empathic about their reasons for leaving. Before finishing the conversation, you pull out your leavers checklist and make a plan.



## A few basics you might have on your leavers checklist:

- ☒ Changing computer and software logins and access
- ☒ Collecting all company property and assessing its condition (ie. IT equipment, access cards or keys, uniform items and PPE they have been issued)
- ☒ Asking them to return all confidential and commercially sensitive information they have about the business and other employees
- ☒ Conduct a leavers interview. Get feedback on their experience and whether any of this contributed to their reasons for leaving
- ☒ Organise the return and review of any company vehicles. Arrange any follow up maintenance
- ☒ Confirm final pay date, and whether any deductions are necessary from the final pay
- ☒ Book in regular handover sessions where they can share their work progress and begin to hand over their work to someone else

Develop a master checklist you want to use for all outgoing employees, then all you have to do when an employee moves on is pull out the list, review it and adapt it to suit that particular role.

Remember, a good employment agreement is worth its weight in gold. You may not know the true value of your agreements and employment practices until things go wrong or someone wants to leave. Does your existing employment agreements have provisions that survive termination? Pull out an employment agreement now and check it for terms like non-solicitation of clients or employees, and intellectual property and confidentiality.



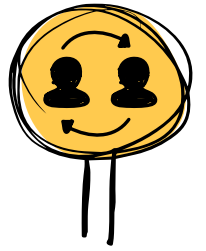
# SUCCESSION

## SECTION 09

One of your employees is looking to grow into a new role in the business.

**Do you encourage them in their current role which they've mastered?**

**Do you look to see how their skills can be leveraged in a fresh way?**



Your search for Joe's successor started a while ago. Joe noted that Susan was a possibility during her first few weeks. Because Joe had a plan with his manager about his retirement and how his work would transition to the next person, the transition has been quite seamless. He's been challenging and pushing Susan probably more than he would otherwise. If Susan were to resign before the handover, Joe could be back to square one, looking to recruit and train someone with no prior knowledge of the business. Plus, Joe has knowledge that can't be shared within a few weeks. Realistically, you could consider an employee's succession plan as your insurance policy. Protects against valuable knowledge and IP (Intellectual Property) doesn't walk out the door. But it's one you have to budget and plan for.

**"My manager encourages everyone to train on anything and everything they can in their department. A more knowledgeable employee means they can fill in for others that aren't at work." – John Schow**

Systems and practices adapt and evolve due to customer needs and industry developments, and the work your employees do will evolve as well. As the business owner or general manager, it is your responsibility to look ahead and identify the skills and expertise your business needs to successfully navigate the journey ahead.

The transition from retention to succession is fluid. You could be having conversations around succession throughout the retention phase, as you challenge your employee and become aware of their future potential.

Succession planning is not necessarily about promoting someone. Succession is also about how you might change the work your employee does, or they could move into a new team following a restructure. It is more about a transition than a promotion.

Being able to redeploy an existing employee into other jobs or projects is a highly desirable place to be. Not only will the training time for them be shorter, when you do find someone to step into their old role, you'll have them on hand to help with training their replacement.

So how do you retain and move your people through your business, so you can leverage their strengths in new ways as well as develop new ones in preparation for change? **Two words: succession planning.**

Review the inner workings of your business, the key functions of your work, then overlay this with the strengths, areas for development and expertise you have in your team. This can be focused on one team or on a whole business.

This last piece of the employee journey is often one least thought about, or we don't have the time to get to. But it is equally as important. It enables an employee's journey to evolve and transition into the new. Whatever that new may look like.

**"Someone is sitting in the shade today because someone planted a tree a long time ago."**

**– Warren Buffett**

# CONCLUSION

## SECTION 10

Congratulations! You've almost reached the end of this guide. By now, you should be feeling good about your ability to make the your employee's journey happen. You may even have thought of different ways you can improve your leadership style. But before I wrap up, I just want to give you one final pointer about the Employee Journey.

Check out businesses that have great cultures and manage to attract and keep people with ease. Figure out 'why'. You will uncover insider information and become a better employer even faster. There's nothing more effective than building on the success of those who have gone before.

Before we finish up, I'd just like to say thanks again for working through this mini course, come e-book. I've really enjoyed having the opportunity to share with you my methodology and things I've learned about human resources over the years.

I'd love to hear how it's going once you start putting what you've learned into action, my email address is: **catherine@stapleton.consulting**, and I'm really looking forward to hearing your comments.

Finally, if you want to stay updated on what I'm doing and get actionable tips related to employment, please follow me on Facebook or LinkedIn, I post on there fairly regularly.

You can also visit my website at **www.stapleton.consulting** That's where you'll find my blog, and you can check out some of the other templates and resources I created that we didn't manage to include in this book.

Thanks again, I can't wait to hear about your high employee attraction and retention rates, once you start putting these tips into action!



**Catherine Stapleton**  
*Principal HR Consultant  
& Founder*

*The SMEs HR side-kick  
bringing clarity to  
your Employment  
& HR practices*

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FIND ME ON  
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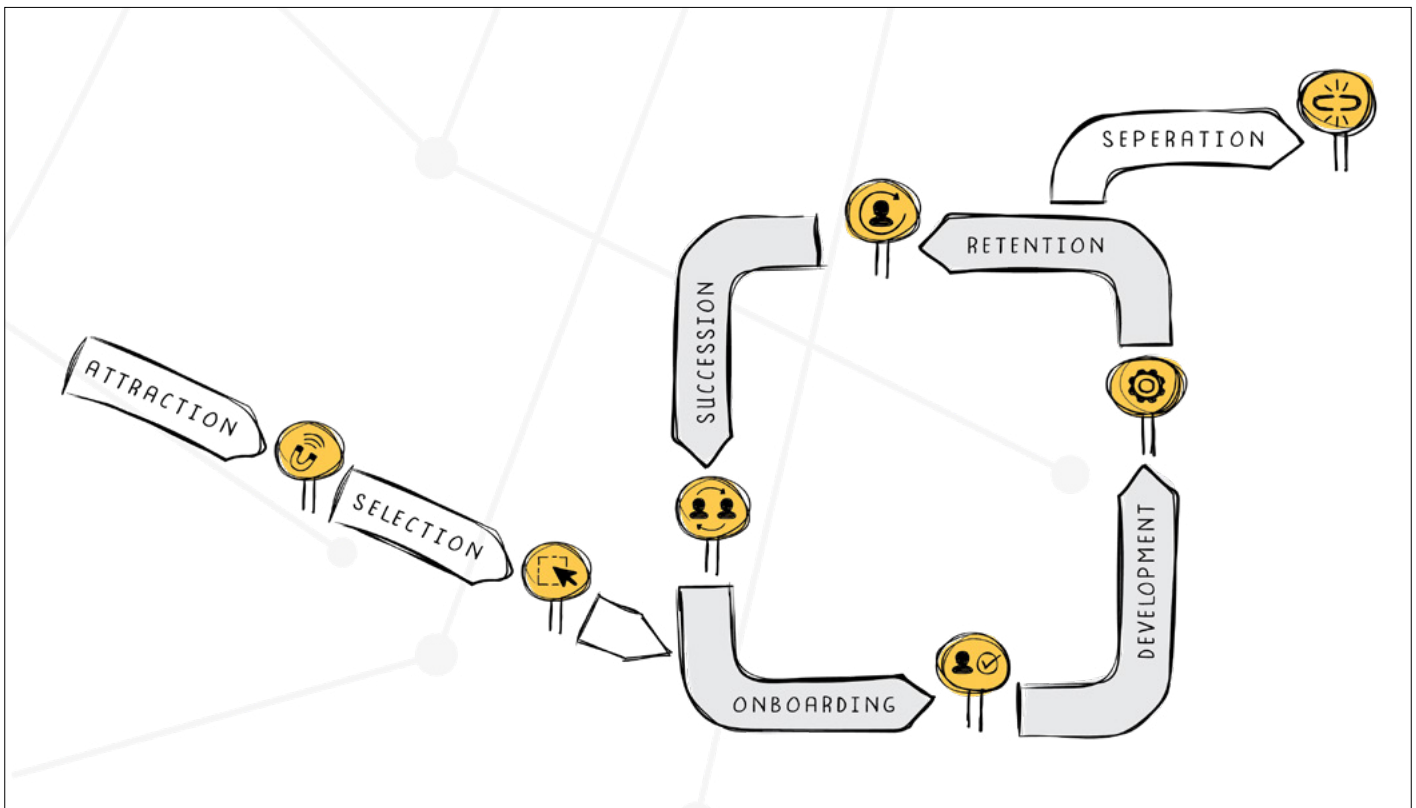
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# THE BIG PICTURE OF THE EMPLOYEE JOURNEY

## SECTION 11



**Need employment and HR support?  
The best time to act is always now.**

Sometimes what your business really needs is a different perspective – someone to hear what you don't hear, see what you don't see, to understand what you don't.

At Stapleton Consulting, we look for the employment issues that are creating a barrier for your business, and we make them disappear. Are you struggling to fill role? Trying to update your job descriptions? Developing your business and people strategies for growth? Implementing health and safety procedures? Or are you unsure what you need, but know you need something?

As specialist HR consultants, we bring clarity to your HR practices and help you discover what your business needs to thrive using the Employee Journey.

You can work with us one on one, or use our resources and tools to do it yourself. We're your trusted HR sidekick, consultants for everything you need in human resources, job vacancies, employee retention, health and safety, and payroll.

**Are you ready to start a beautiful journey? Let's go.**

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