

UPCOMING • WEBINAR

Strategies for Driving Engagement and Retention in Financial Services



Pam Peters, Engagement and Culture Director
at GreenState Credit Union

Julia Markish, Director of Advisory Services

NOVEMBER 15, 2022

10AM PT - 11AM PT

Welcome!

- Thank you for joining us! Everyone who attends will receive a voucher for lunch in the next few days.
- We'd love to answer your questions! Please submit your questions on the Q&A tab.
- If you would like to see a demo of Lattice press the "Request a Demo" button on the top right of your screen
- Check out the articles and ebooks in the "Docs" tab.
- This session is being recorded and you'll receive the recording, slides, and SHRM and HRCI credits via email after the event.



Top of Mind for People Leaders in 2023

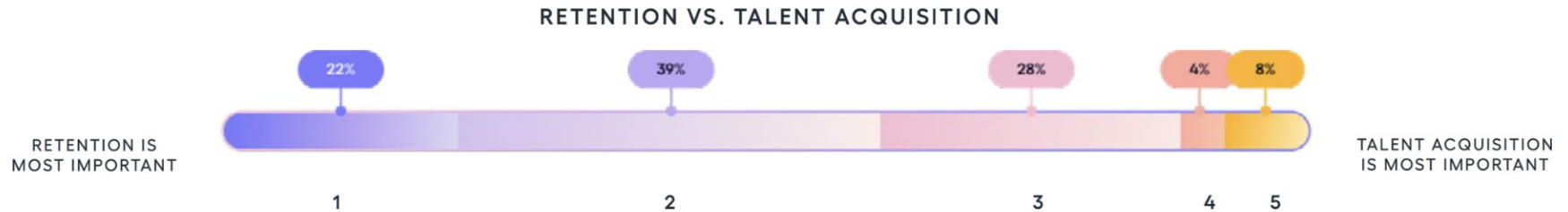


FIGURE 10: When balancing investments across talent acquisition and retention, which best captures your company's priorities in the next 12 months?



Top of Mind for People Leaders in 2023

EXPECTED INVESTMENT INTO RETENTION

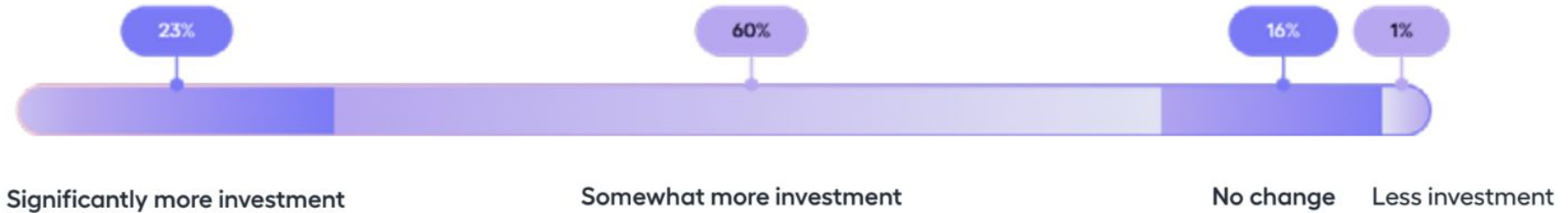


FIGURE 11: In the next 12 months, do you expect to make more, less, or the same level of investments into the employee retention?



Agenda for Today's Discussion

- 01 **Alignment** – Using company values and objectives to inspire your teams
- 02 **Growth**– Clarity around what growth opportunities exist, for whom, & when
- 03 **Listening**– Monitoring, understanding, and responding to employee input
- 04 **Q&A from attendees**



People Success in Practice

Alignment

Using company values and objectives to inspire your teams



Green State Credit Union Values

We **Grow** Through Learning

We Build Positive Team **Spirit**

We're **Truthful and Accountable**

We Go **Above and Beyond**

We **Take Risks**

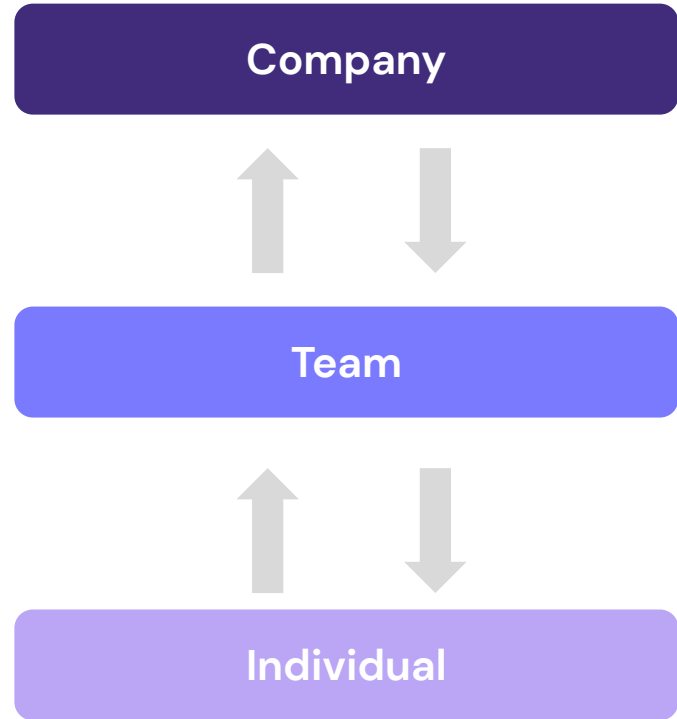
We Embrace **Efficiency** and
Continuous Improvement



GreenState
CREDIT UNION

Defining Everyone's Role in Company Objectives

Connect Employee Goals to Company Objectives



People Success in Practice

Growth

Clarity around what development opportunities exist, for whom, and when



Programs to Support Employee Growth

Onboarding

Continuing
Education
Programs

Employee
Growth Plans
(IDPs)

Job Shadowing

Career Tracks

Feedback

Continuous
Performance
Reviews

Employee-
Manager Career
Conversations



People Success in Practice

Listening

Monitoring, understanding, and responding
to employee input



Listening Tools

Engagement Surveys

Long surveys (15+ questions) designed to uncover employee sentiments and needs:

- Annual surveys
- Onboarding surveys
- Acquisition surveys
- ENPs

Pulse Surveys

Short, more frequent surveys that can measure progress against specific initiatives, or gain insight into time-sensitive topics.

Stay Interviews

Short, casual interviews, often following a standard set of questions to gain insight into employee motivations for staying at a company.

Exit Interviews & Surveys

Exit interviews are informal conversations led by an HR rep when employees leave.. Exit surveys are short surveys that use a standard set of questions including at least one open-ended question.

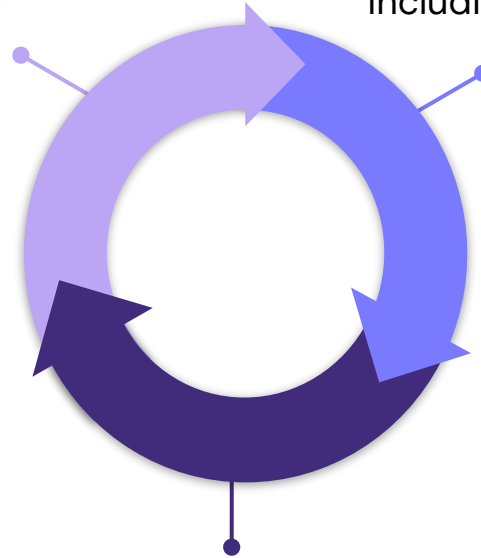


How Green State Credit Union Uses Engagement Surveys to Build a Stronger culture



Launch Engagement Survey

Review results-
including comments



Implement changes
to create a more inclusive culture

Thank you!

