



Employee Detachment Inventory (EDI) FEEDBACK REPORT

PRIVATE & CONFIDENTIAL

Employee : Sample Employee
Manager : Sample Manager
Organisation : Sample Client
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Date : Wednesday, 30 May 2018

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Employee



Detachment



Inventory

Introduction

What is The EDI

The **Employee Detachment Inventory (EDI)** is the world's leading Exit/Transition survey instrument used to achieve best practice in Employee Exit and Transitioning based on Attachment and Detachment research.

The Employee Detachment Inventory (EDI) provides Human Resource professionals with an objective methodology for measuring the perceptions of departing employees. It measures the degree to which various aspects of the employment experience impacted the employee's decision to leave. The EDI can be used as a stand-alone exit measure or in conjunction with your interview process, using the results contained in this report as a basis for holding a targeted conversation.

The EDI has several unique features including the measure of "Push and Pull" forces present at the time of decision to leave/transition.

Key: Engagement vs. Detachment Drivers

Engagement drivers are "pull" forces; these are the reasons for wanting to stay.

Detachment drivers are "push" forces; these are the reasons for wanting to leave.

The EDI framework has **12 key drivers** and **64 elements** and uses a scale from **-100 through to +100%**.

The EDI dashboard will allow you to see the **Push, Neutral** and **Pull** forces based on a unique measure of **"Satisfaction and Importance"**.

How Should We Use The EDI

We recommend the EDI instrument be used by HR teams prior to conducting a targeted Exit/Transition interview as part of a complete Exit/Transition process. Once the EDI results are received, we recommend the Exit/Transition interview focusses on exploring the drivers and elements that are most relevant. A notes page is provided at the back of the report. The Exit/Transition interview should be efficient, targeted and enjoyable for both the employee and the HR practitioner.

If your HR team are using the EDI+, you also have the opportunity to collect the Manager Perceptions about the satisfaction of the Exiting/Transitioning Employee. The Perception Gap is an important reflection and consideration measure that helps all managers better consider the perceptions of remaining team members.

How Should I Debrief The Result

With The Employee: Using the EDI as part of your Exit/Transition Interview will allow you to discuss the results directly with the Employee. Take the time to explain the Push and Pull measure and highlight the strong Pull Forces before exploring the strong Push Forces. Understanding these forces will help the employee when considering their future work options.

Remember that the Exit/Transition Interview is a very important opportunity to demonstrate appreciation of contribution, ask for help to learn from their experiences, and promote the desire to remain connected with a view to future possible re-employment. Past employees are the second largest influencers on your Employer Brand in the market. Also consider that specialist skills in the market are reducing and the talent pool now has to consider past employees. How you manage the Exit/Transition Process and how you maintain a strong relationship with your past employees could give you a significant competitive advantage.

Introduction

With The Manager: Any time we receive feedback as an adult it is a confronting experience. This is because it is rare that the feedback lines up exactly with our desires or expectations. It is for this reason though that it is valuable. If feedback only reinforced our own views, it would not be a learning and growth opportunity. Receiving EDI feedback results as a manager should be confronting, but never confrontational. Helping your manager to understand, accept and then use the results can be a challenging but very rewarding experience as an HRBP. If you can help your manager consider the experience of the Exiting employee with a view to better understand the remaining team members, you are potentially helping the manager to avoid future unwanted attrition.

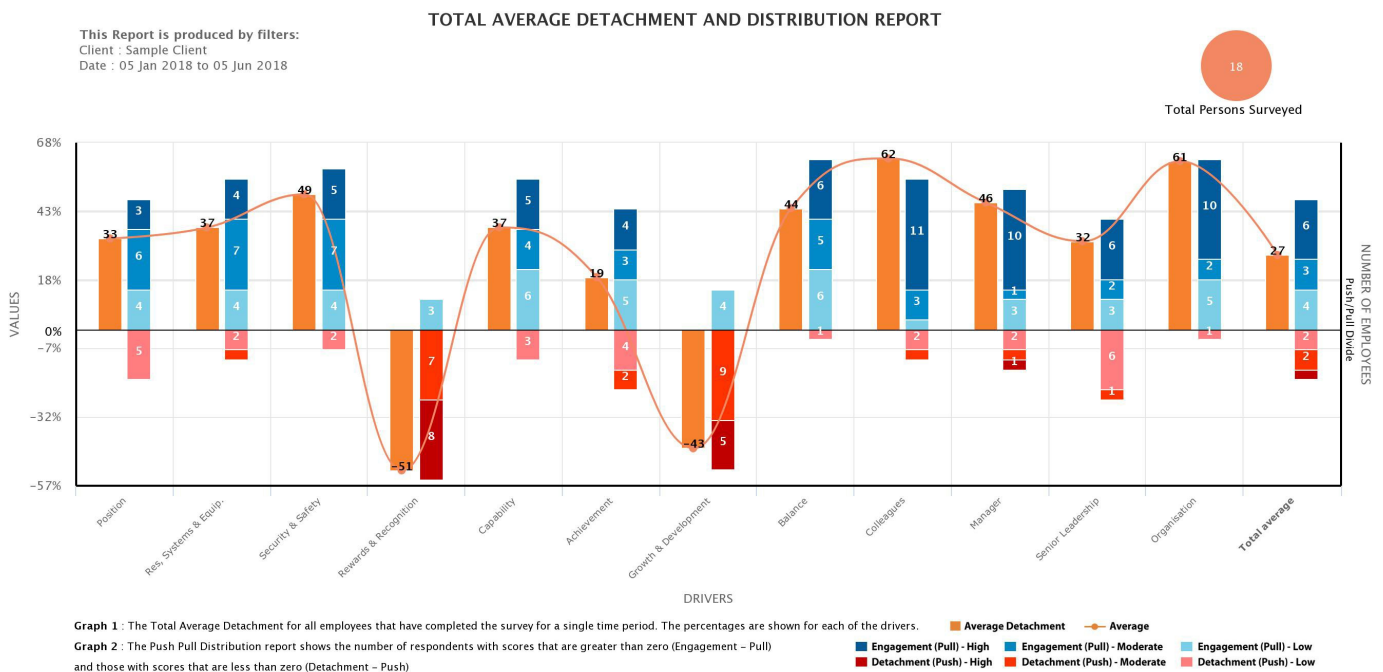
The EDI alone is effective to help managers consider this, however the EDI+ will provide an accurate measure of the Manager's perception of the level of satisfaction of the employee and will directly compare this to the actual measure from the employee. The EDI+ report includes a "Perception Gap" score that supports the debriefing with your Manager. Any perception gap score greater than 20% in either the +/- is an opportunity to focus your discussion and help them consider why the gap was so significant. Pose questions about what this could mean regarding the remaining team members and what opportunities there are to explore this with them.

Awareness - Acceptance - Action - Achievement

How Should We Use The Trend Reports

EDI Trend reporting is very powerful for HR teams. It allows you to report on and interpret Push and Pull forces across the full structural and demographic range of your workforce. From individual manager trend results through to organisation wide, you will be able to use the insights to further strengthen your Engagement strategy and initiatives. Directly target to key elements and drivers that are affecting attrition across your organisation.

For further information and support in using the trend reporting capability of the shcBOND platform, please contact Pamela.Kinlay@shcBOND.com



EMPLOYEE DEBRIEF

EDI Framework/Dashboard

Employee Name	Sample Employee	Tenure	6 Months
Department	Finance	Manager	Sample Manager
Position	Finance Manager	HR Contact	Sample HR Manager
Survey Completed	30/05/2018	Employee Score	50.3%

Key: ■ Detachment (Push) ■ Engagement (Pull)

Driver: Position	89%	Driver: Capability	82%	Driver: Colleagues	82%
Personal Workspace	82%	Support & Training	70%	Acceptance, Belonging & Trust	100%
Contribution	100%	Policy & Procedures	97%	Encouragement & Support	82%
Difficulty & Challenge	100%	Standards	78%	Teamwork	59%
Diversity & Variety	100%	Performance Expectations	78%	Pride, Identity & Commitment	86%
Type of Work	64%	Current Skill Level	85%		
Driver: Res, Systems & Equip.	-36%	Driver: Achievement	88%	Driver: Manager	93%
Impact on Effectiveness	-30%	Awareness	81%	Accessibility & Approachability	88%
Support & Assistance	-45%	Challenged	94%	Communication	100%
Quality & Effectiveness	-29%	Fulfilled	94%	Clarity & Direction	96%
Availability & Accessibility	-38%	Goal Focused	90%	Support & Development	77%
		Self Directed	83%	Value Alignment	100%
				Style	100%
				Fairness	84%
				Consistency	96%
Driver: Security & Safety	79%	Driver: Growth & Development	-36%	Driver: Senior Leadership	82%
Organisation Stability	78%	Quality of Training	-52%	Visibility	78%
Position Security	100%	Access to Training	-42%	Accessibility	74%
General Workplace Safety	88%	Career Related Devel.	-41%	Confidence	86%
Personal Safety	51%	Position Related Devel.	-9%	Communication	88%
				Vision & Direction	78%
				Inspiring & Motivating	89%
				Commitment to People	82%
Driver: Rewards & Recognition	-55%	Driver: Balance	53%	Driver: Organisation	82%
Sense of Being Valued	-42%	Hours of Work	84%	Core Business	75%
Org. Incentive Programs	-45%	Responsiveness to Needs	88%	Customers	83%
Employee Benefits	-69%	Out of Work Commitments	71%	Mision & Direction	100%
Performance Related Pay	-65%	Travel & Transportation	-67%	Strategy	83%
Base Salary	-53%	Flexible Conditions	51%	Operating Model & Structure	82%
		Workload/Volume	91%	Responsibility	73%
				Values	80%

Position

The extent to which the exiting employee was satisfied with their personal workspace, level of contribution, difficulty and challenge, diversity and variety, and type of work experienced in their current position.

Driver: Position	89%
Personal Workspace	82%
Contribution	100%
Difficulty & Challenge	100%
Diversity & Variety	100%
Type of Work	64%

High pull factors for this driver are achieved when the individual holds a strong feeling of "fit" or "job pride" for the position and feels a strong sense of satisfaction in what they do. They have been challenged and provided the opportunity for variety in the type of work they have been doing. They have enjoyed the personal work environment and believe they have contributed well in their role.

High push factors for this driver are normally the result of an individual either not feeling a sense of purpose or feeling that the position does not allow them to make a meaningful contribution. They no longer like "what" they do and have aspirations to seek a different type of role which provides a level of challenge and variety. There could be a level of dissatisfaction with their personal work environment.

Interview Notes:

Interviewer Feedback to Manager Notes:

Resources, Systems & Equipment

The extent to which the exiting employee was satisfied with the impact on effectiveness, support and assistance provided, quality and effectiveness, availability and accessibility of the resources, systems and equipment provided in the current position.

Driver: Res, Systems & Equip.	-36%
Impact on Effectiveness	-30%
Support & Assistance	-45%
Quality & Effectiveness	-29%
Availability & Accessibility	-38%

High pull factors for this driver are achieved when the individual holds a strong feeling of having the right tools for the job and support in how to use them effectively. There is a strong sense of "I have what I need to be successful." Resources are readily available and accessible and they feel they have been able to achieve a level of quality that has been satisfying.

High push factors for this driver are normally the result of an individual feeling that either the tools they have been given are inadequate for their job or there is a lack of support in how to use them. There is normally a sense of being impeded or an inability to do the job for reasons beyond their control. A lack of support and assistance could also have played a role.

Interview Notes:

Interviewer Feedback to Manager Notes:

Security & Safety

The extent to which the exiting employee was satisfied with the perceived organisation's stability, feeling of position security, general workplace safety and personal safety in the current position.

Driver: Security & Safety	79%
Organisation Stability	78%
Position Security	100%
General Workplace Safety	88%
Personal Safety	51%

High pull factors for this driver are achieved when an employee believes the organisation is built to last. A strong sense of "I am confident in who I work for" together with a belief that "my employer cares about me" are key influencers of high pull factors.

High push factors for this driver, are normally the result of an individual feeling that either the organisation's stability or their individual job security is compromised. High push factors will also be present if an employee believes that their personal safety or general work place safety is not a priority of their employer.

Interview Notes:

Interviewer Feedback to Manager Notes:

Rewards & Recognition

The extent to which the exiting employee was satisfied with the sense of being valued, involvement in and quality of the organisation's incentive programs, access to employee benefits, access to performance related pay and their base salary in their current position.

Driver: Rewards & Recognition	-55%
Sense of Being Valued	-42%
Org. Incentive Programs	-45%
Employee Benefits	-69%
Performance Related Pay	-65%
Base Salary	-53%

High pull factors for this driver are achieved when an employee believes they are fairly compensated for the job they do, and have the ability to access good incentive and benefit programs based on individual, team and organisation performance. There is a strong feeling that "the organisation treats me fairly, values who I am and what I do."

High push factors for this driver are normally the result of an individual feeling either they are unfairly compensated for their role or that the effort they put in relative to others is not recognised or rewarded. These perceptions can be based on internal and/or external indicators and result in individuals significantly reducing their discretionary effort and seeking an environment where they believe they will be treated and remunerated fairly.

Interview Notes:

Interviewer Feedback to Manager Notes:

Capability

The extent to which the exiting employee was satisfied with the support and training provided, policy and procedures impacting, standards required, performance expectations and current skill level required in the current position.

Driver: Capability	82%
Support & Training	70%
Policy & Procedures	97%
Standards	78%
Performance Expectations	78%
Current Skill Level	85%

High pull factors for this driver, are achieved when the organisation commits to ongoing skill development for the employee and is perceived to hold a willingness to review and address any policies or procedures that impact the standards and performance expectations within the role. "They help me to keep getting better at my job."

High push factors for this driver, are normally the result of an individual feeling that what is expected of them is out of reach, either because they have not been developed in the skills they require, policies and procedures are out of date and inhibit performance or expectations of standards and performance, are unrealistic - "no-one is paying attention or listening."

Interview Notes:

Interviewer Feedback to Manager Notes:

Achievement

The extent to which the exiting employee was satisfied with their awareness of opportunities, the feeling of being challenged, ability to feel fulfilled, goal focused and self-directed in the current position.

Driver: Achievement	88%
Awareness	81%
Challenged	94%
Fulfilled	94%
Goal Focused	90%
Self Directed	83%

High pull factors for this driver are achieved when the employee feels that they are getting high levels of satisfaction and fulfilment from their position. They "love what they do and who they are doing it for." They feel they are able to identify and set their own goals which are aligned to team and organisation goals and they can be self-directed and hold personal accountability for their performance.

High push factors for this driver are normally the result of an individual feeling they have a low level of ownership and control in their role or that the role is no longer challenging and rewarding for them. "It's a means to an end" or "it's a job and I get paid for it." The focus tends to be on "just get the job done" and there can be frustration with the level of management or supervisor control and involvement.

Interview Notes:

Interviewer Feedback to Manager Notes:

Growth and Development

The extent to which the exiting employee was satisfied with the quality of and access to training, provision of career and position related development while in their current position.

Driver: Growth & Development	-36%
Quality of Training	-52%
Access to Training	-42%
Career Related Devel.	-41%
Position Related Devel.	-9%

High pull factors for this driver, are achieved when the employee feels they have been well developed and have had access to great training and development opportunities. There is a feeling that "the organisation really makes an effort to invest in the growth and development of people."

High push factors for this driver, are normally the result of an individual feeling they have been stuck in a job with little or no growth and development opportunities. There is a feeling that "the organisation has not invested in me or helped me develop my career." Training and development are quite important to this individual and the organisation has neglected this or decided not to invest in them.

Interview Notes:

Interviewer Feedback to Manager Notes:

Balance

The extent to which the exiting employee was satisfied with the consistent hours of work, responsiveness of the organisation to individual needs, ability to meet out of work commitments, impact of travel and access to transportation, provision of flexible work conditions and the workload and ability to manage the volume of work in their current position.

Driver: Balance	53%
Hours of Work	84%
Responsiveness to Needs	88%
Out of Work Commitments	71%
Travel & Transportation	-67%
Flexible Conditions	51%
Workload/Volume	91%

High pull factors for this driver are achieved when the employee feels that they have been able to achieve great balance between their in work and out of work commitments. They feel that the hours of work have been right relative to the work volume and standards required. There is likely a strong feeling that "the organisation understands and helps me to address my needs" and provides flexibility in working conditions when required. Travel and transportation have unlikely been an issue.

High push factors for this driver are normally the result of an individual feeling that the workload is not sustainable given the hours of work and they have often had to work extended hours or compromise quality. This has led to an impact on their out of work commitments and a perception that the organisation is not responsive to or considerate of employee needs.

Interview Notes:

Interviewer Feedback to Manager Notes:

Colleagues

The extent to which the exiting employee felt satisfied with being accepted, belonging, trusted, encouraged and supported, and with a sense of teamwork, shared pride, identity and commitment with colleagues while in the current role.

Driver: Colleagues	82%
Acceptance, Belonging & Trust	100%
Encouragement & Support	82%
Teamwork	59%
Pride, Identity & Commitment	86%

High pull factors for this driver, are achieved when the employee feels like "I like who I work with" and "I am part of a great team who trust and support each other and we take pride in what we do." They are likely to be upset that they are leaving this team, who they feel very attached to and hope to stay connected to the people in their team.

High push factors for this driver, are normally the result of an individual feeling disconnected from or a low sense of being part of a team. They can feel that their colleagues do not hold the same level of commitment that they do or that they are not accepted by or trust their team mates. There can be a general feeling of low or no encouragement and support provided by the team to one another.

Interview Notes:

Interviewer Feedback to Manager Notes:

Manager

The extent to which the exiting employee was satisfied with the accessibility to and approachability of, communication between, clarity and direction provided by, support and development, value alignment with, behavioural style of, sense of fairness and consistency from the immediate manager while in their current position.

Driver: Manager	93%
Accessibility & Approachability	88%
Communication	100%
Clarity & Direction	96%
Support & Development	77%
Value Alignment	100%
Style	100%
Fairness	84%
Consistency	96%

High pull factors for this driver are achieved when the employee feels that they have had a great relationship with their manager. The support and investment in their growth and development along with the clarity, direction and communication have all been a great style fit. There is a perception of consistency and fairness which has led to a strong working relationship.

High push factors for this driver are normally the result of an individual feeling there is not a good working relationship with their manager. Feelings of "they don't get me" or "I don't feel supported" or "they just don't have a good manner when they communicate" could all be factors. There can be a perception of a lack of fairness or unpredictability and potentially volatility which affects the level of support and value alignment the employee has been feeling.

Interview Notes:

Interviewer Feedback to Manager Notes:

Senior Leadership

The extent to which the exiting employee was satisfied with the visibility of, accessibility to, confidence in, communication from, vision and direction provided by, feeling of being inspired and motivated by, and sense of commitment to their people created by the senior leaders while in their current position.

Driver: Senior Leadership	82%
Visibility	78%
Accessibility	74%
Confidence	86%
Communication	88%
Vision & Direction	78%
Inspiring & Motivating	89%
Commitment to People	82%

High pull factors for this driver are achieved when the employee feels that the senior leaders of the business have created a great vision and direction for the organisation. They feel the senior leaders are visible, accessible and communicate well to the organisation. Senior leaders are often regarded as inspiring and motivating and that they hold their people in high regard. Overall there is a strong sense of confidence in the senior leaders and the employee feels they are a real asset to the organisation.

High push factors for this driver are normally the result of an individual not feeling confidence in the senior leaders of the organisation. This could be at a functional level or across the wider organisation. A combination of poor communication, visibility, lack of inspiration or a perception of poor commitment to people could all be contributing. This may be the perception about one or more senior leaders.

Interview Notes:

Interviewer Feedback to Manager Notes:

Organisation

The extent to which the exiting employee was satisfied with the core organisation products and services, customers, mission and direction, strategy, operating model and structure, purpose, responsibility and values of the organisation experienced while in the current position.

Driver: Organisation	82%
Core Business	75%
Customers	83%
Mision & Direction	100%
Strategy	83%
Operating Model & Structure	82%
Responsibility	73%
Values	80%

High pull factors for this driver are achieved when the employee feels that they have been working for an organisation they have been really aligned to and proud to be part of. They have felt strongly about the core products and services, the commitment to clients and customers and the strategy of the organisation. There has been a strong connection to their sense of purpose and the organisation's mission and direction together with strong value alignment. They are likely to want to return to work for the organisation again in the future.

High push factors for this driver are normally the result of an individual feeling they have been here to do a job and get paid, but have not felt very connected or aligned or even felt misaligned to who the organisation is or what they do. The employee may have accepted the role for security or financial reasons or there may have been significant recent change in the organisation which has led to them feeling it is no longer the place they used to feel strongly connected or true to their purpose.

Interview Notes:

Interviewer Feedback to Manager Notes:

Summary/Notes

Verbatim Comments

Interviewer Summary

Jot down any notes you'd like to explore further, or any new insights you learn through the Exit Interview.

Summary/Notes

Manager Debrief Summary Notes

Jot down any notes you'd like to explore further, or any new insights you learn through the Manager Debrief.

Name of Interviewer : _____

Name of Manager : _____

Date of Interview : _____



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