



LRI Consulting Services, Inc.

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SAMPLE

Opportunity Assessment Report

Company Name Deleted



Presented by LRI Consulting Services, Inc.

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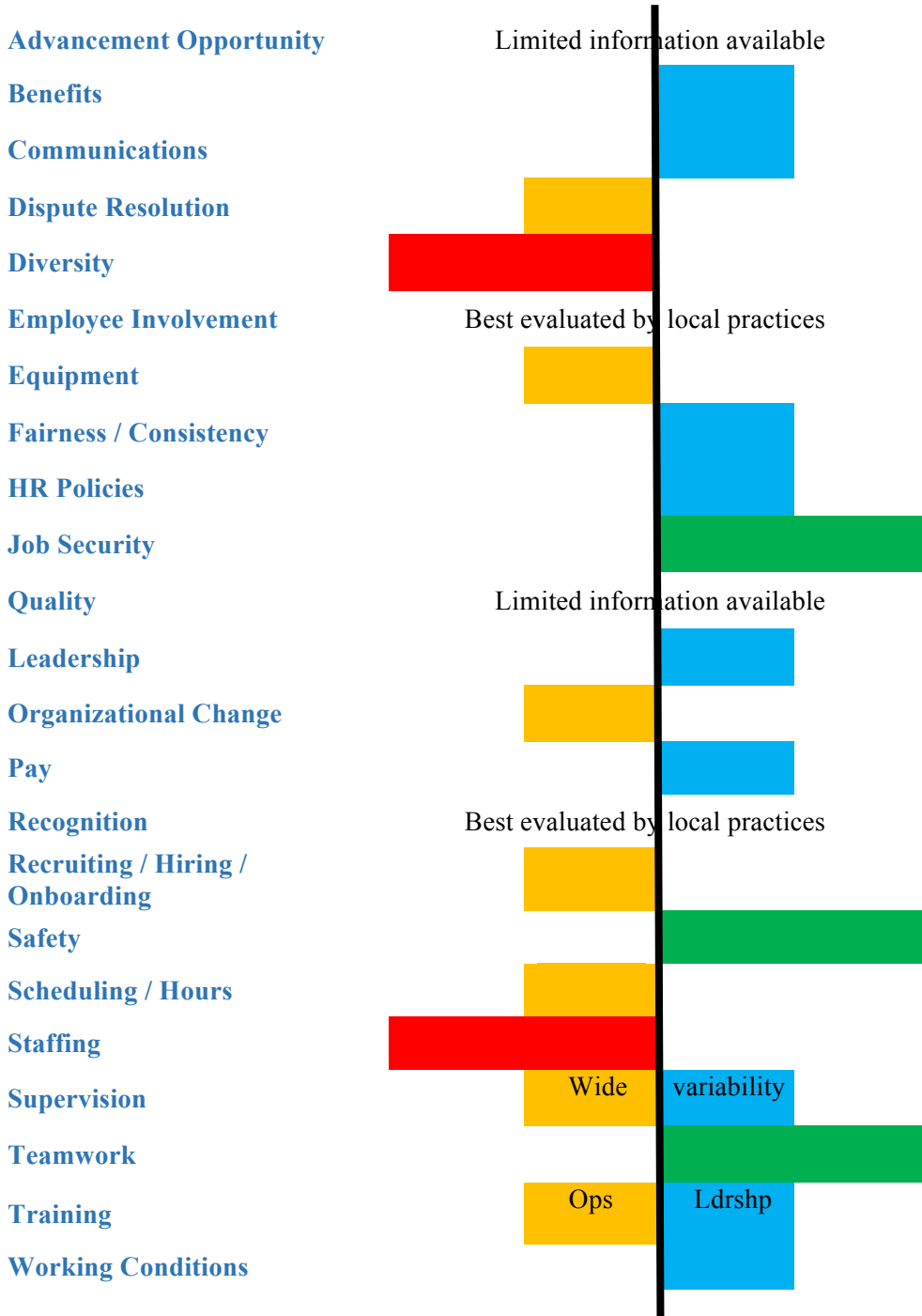


Labor Relations Institute, Inc.

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1) Employee Relations Audit (Gap Analysis Summary)



Gap Closure Recommendations

ER Factor	Key Opportunities	Recommended Actions
General	<ul style="list-style-type: none"> Enhance Employee Opinion Survey (EOS) [name] integration 	<ul style="list-style-type: none"> Map LRI 3rd-party intervention items vs. EOS and monitor employee relations issues at current locations Create a [name]-specific ‘Vulnerability Index’ <u>LRI</u> - review current [name] action planning process Organize a Transition Monitoring Team to track pulse of the organization & facilitate upward communication Establish short-range transition goals and checkpoints for monitoring progress Clarify and communicate the purpose of the RIF to impacted employees (why are we doing this?) Create a transition management plan which outlines when employees will receive the information, training or support they need to make the transition
Benefits	<ul style="list-style-type: none"> Good overall package, except for vacation & sick pay policies; can create work/life balance issues 	<ul style="list-style-type: none"> Conduct benefits benchmarking study Adjust vacation & sick pay policies accordingly to ensure competitiveness vs. industry standards Ensure leadership support in enforcing utilization of vacation/sick time without stigma or fear of retribution
Communications	<ul style="list-style-type: none"> Capture [City,State] history – [year] organizing drive Communicate [name] unique history and many strengths / offerings more effectively 	<ul style="list-style-type: none"> Develop video & employee stories for use in potential future campaigns Develop custom communication collaterals to “sell” [name] value proposition to future recruits & current employees (<i>see attached sample ‘paycheck stuffers’</i>)
Dispute Resolution	<ul style="list-style-type: none"> Is anything in place beyond Open Door policy? 	<ul style="list-style-type: none"> Define and implement a progressive disciplinary procedure, and include in Employee Handbook (<i>see attachment describing sample processes</i>)
Diversity	<ul style="list-style-type: none"> Increase diversity at all levels of management 	<ul style="list-style-type: none"> Define and communicate diversity as a core value Establish diversity goals and track representation across all management and supervisory levels Include ‘Valuing Diversity’ as part of New Hire Orientation Provide diversity awareness training for all leaders Advertise employment opportunities to diverse group of potential candidates Promote [name] to minorities through career days @ minority educational institutions or by offering professional internships for minority students
Equipment	<ul style="list-style-type: none"> Aging facility and equipment ([name]; other locations?) 	<ul style="list-style-type: none"> Determine facility & equipment upgrade priorities Identify and prioritize required investments Establish equipment acquisition plan



ER Factor	Key Opportunities	Recommended Actions
Fairness / Consistency	<ul style="list-style-type: none"> Reduce variability in ER practices across locations 	<ul style="list-style-type: none"> Standardize key practices to ensure fair/consistent treatment of all employees, and help efficiently manage future company growth Involve Ops & field HR in standardization process in order to minimize stifling of local entrepreneurial spirit
HR Policies	<ul style="list-style-type: none"> Attendance – “loose” policy; inconsistent administration At-Will employment statement Social Media policy 	<ul style="list-style-type: none"> Strengthen written, formal policy and inspect for consistent administration across locations Legal review to ensure it doesn’t imply employees have no power to alter this provision Legal review to ensure alignment with NLRB position
Leadership	<ul style="list-style-type: none"> Create greater companywide accountability for addressing non-performance Reduce generational gap between tenured leaders and younger employees 	<ul style="list-style-type: none"> <u>Reading</u>: ‘How Did That Happen?.’ by Roger Connors & Tom Smith Add an ‘Accountability’ module to Leadership Development curriculum Provide training to enhance leaders’ capability to communicate effectively with Gen X & Y employees
Organizational Change	<ul style="list-style-type: none"> Balance company history / legacy with the needs of today’s changing workforce demographics Respond effectively to employee generational differences 	<ul style="list-style-type: none"> Train leaders on how to talk about and support company change initiatives Review current HR policies/practices to ensure they address the diverse needs of today’s workforce Adjust and update policies as necessary to positively impact ability to attract and retain quality talent
Pay	<ul style="list-style-type: none"> Manage employee perception of make less (less hours, lower raises) & pay more (increasing benefit cost) (GLC) 	<ul style="list-style-type: none"> Conduct periodic meetings with hourly employees to educate them on Total Pay @ [name] Develop an individualized Total Pay statement for distribution annually to each employee
Recruiting / Hiring / Onboarding	<ul style="list-style-type: none"> Reinforce company’s philosophy on maintaining a union-free workplace Reduce variability in recruiting and hiring practices across divisions / locations 	<ul style="list-style-type: none"> Introduce company ‘Statement on Unions’ during recruiting process & include in New Hire Orientation Examine effectiveness of NHO communications; develop a custom video (<i>links to sample videos</i>) Standardize hiring process to increase consistency and effectiveness

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Scheduling/Hours	<ul style="list-style-type: none"> Running lean (see ‘Staffing’ below); work/life balance issues (Sales) 	<ul style="list-style-type: none"> See ‘Staffing’ below
Staffing	<ul style="list-style-type: none"> Address critical staffing issues in Transportation & Warehouse (noted as a key issue in several locations) 	<ul style="list-style-type: none"> Organize a cross-functional (HR; Trans; WH) team chartered to problem solve staffing issues and identify affordable solutions for improving workforce planning process
Supervision	<ul style="list-style-type: none"> Reframe mindset (“I’m just a Driver”) of Trans supervisors Improve overall skills & capability to lead others (all supervisors); highlighted as a key weakness in some areas/locations Address wide variability in spans of control (e.g., range = 7—55 in [city,state]) 	<ul style="list-style-type: none"> Establish and communicate clear expectations for supervisory mindset and behavior Assess supervisors to identify individual training / skill development needs Provide necessary supervisory skills training Reduce spans of control where possible; these may be negatively impacting both supervisor effectiveness & employee satisfaction
Training & Development	<ul style="list-style-type: none"> Limited resources & time (Ops) 	<ul style="list-style-type: none"> Drive training through many channels; utilize multiple modalities such as the classroom, workplace, blended learning, eLearning, technology support tools, and co-workers to ensure that people get the right skills, at the right time and in the right way Train supervisors in providing effective coaching and feedback to support on-the-job performance and development of hourly employees
Working Conditions	<ul style="list-style-type: none"> Physically demanding work can be particularly difficult for tenured employees 	<ul style="list-style-type: none"> Identify alternative means for tenured employees to contribute to operational performance beyond traditional, highly physical job roles

Recommended Next Steps

- 1) Prioritize and implement ER gap closure actions
- 2) Complete union vulnerability heat map
- 3) Conduct MDI and focus groups in “high-risk” locations
- 4) Develop ‘Preparedness Toolkit’ materials
- 5) Organize and train internal Jump Team

Attachments

- Business Leader interview feedback summary
- HR Director interview feedback summary
- Sample ‘Alternative Dispute Resolution’ (ADR) processes
- Sample ‘Paycheck Stuffers’ (4 examples)

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