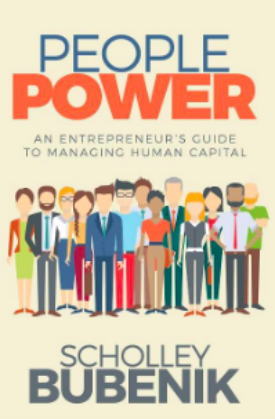
About These Forms

These forms were created by Premier HR Solutions to accompany Scholley Bubenik's book *People Power: An Entrepreneur's Guide to Managing Human Capital*. These resources may be useful without the book to accompany them, but will be best used in conjunction with the information in *People Power*.

You can purchase People Power on Amazon here.



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Analyzing Turnover

From *People Power: An Entrepreneur's Guide to Managing Human Capital*

Chapter Seven: Employee Rentention and Engagement Strategies

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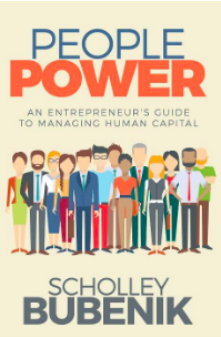

Analyze your turn-over rate:

Turnover Calculation	Number of Employees Separated During Month	Average Number of Employees Separated During Month	Turnover Rate (Monthly)
1st Quarter			
2nd Quarter			
3rd Quarter			
4th Quarter			
Average Annual Turnover			

Track the reasons your employees are leaving here:

Employee Name	Termination Date	Reason for Leaving	Department

Candidate Profiles

From *People Power: An Entrepreneur's Guide to Managing Human Capital*

Chapter Four: Recruiting Starts With the End in Mind

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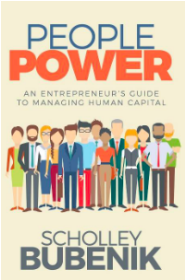

Identify a position in your company. Next, list the experience and traits that will help you determine whether a candidate will be able to fulfill the requirements successfully.

Position:	
Job and Profile Requirements	Traits Needed

List and describe the top three factors you will consider when evaluating whether you made a good hiring decision:

Success Factors	Describe what "success" looks like

Company Salary Ranges

From *People Power: An Entrepreneur's Guide to Managing Human Capital*

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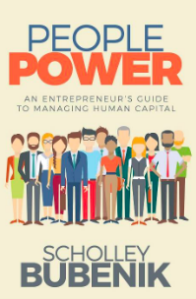

40% salary range example:

Job Positions	Min	Mid	Max
Grade I	$10.40	$13.00	$16
Receptionist	Market salary = $13.00		
Accounts Payable	Market salary = $14.00		
Grade II	$14.20	$17.75	$21
Administrative Assistant	Market salary = $17.50		
Administrative Assistant	Market salary = $17.50		

Complete your salary schedule by listing job positions and salary information:

Job Positions	Min	Mid	Max

Company Training Plan

From *People Power: An Entrepreneur's Guide to Managing Human Capital*

Chapter Six: Training and Development Strategies

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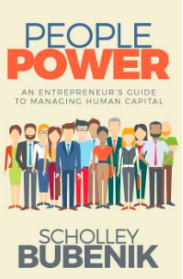

List the business outcomes and training goals for the major training objects first, and then identify the training topic that relates to these outcomes and training goals.

Training Topics	Business Outcomes/Training Goal

Company Training Schedule

From *People Power: An Entrepreneur's Guide to Managing Human Capital*

Chapter Six: Training and Development Strategies

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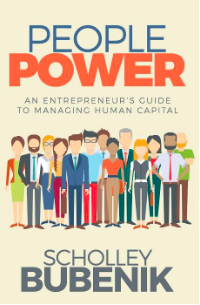

To develop a company training plan, identify the target audience in need of the training and a completion date or timeline. During this process, it is important to prioritize and decide which training is most important. You can be specific with your dates, or target specific periods as indicated in the example below:

Training Plan		
Training Topic	Target Audience	Completion Date
Onboarding New Employees	All new employees	First day
Workplace Safety	All employees	First week
Dealing with Difficult Customers	Customer Service Representatives; Sales Associates; Support Admin	First Quarter
Conducting Performance Reviews	Management	Third Quarter
Microsoft Excel—Intermediate and Advanced	Accounting Department	End of Year

Your company training plan:

Training Plan		
Training Topic	Target Audience	Completion Date

Human Capital Strategic Questionnaire

From *People Power: An Entrepreneur's Guide to Managing Human Capital*

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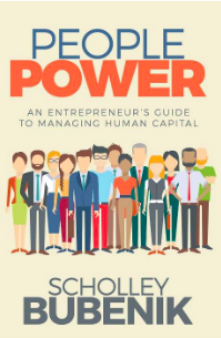


Assess your company's current strategy to gain a deeper understanding of the areas that you need to address. Keep in mind that every company is different due to their size, infrastructure, and industry. I have also found that a company's development phase—whether it is in start-up, expansion, or status quo—also requires different approaches to their human capital strategies.

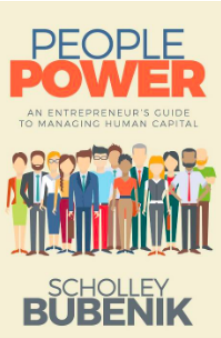
Area	Strategic Questions	Answers/Comments
Recruiting	Do you have a clearly defined recruitment strategy that is successful in finding and hiring the top talent you need for your organizations?	
	Have you created a workforce plan which includes the positions necessary for your company's growth and attrition? The list should include the skills and traits needed for success in each position. Have you created a timeline for vacancies due to turnover and new positions required for growth, so you know when to begin recruiting for these positions?	
	Are your hiring managers trained and confident in their hiring processes?	
	Is your hiring process efficient in both time-to-fill and cost effective?	
Compensation	Do you have a written compensation philosophy?	
	Does it address strategies related to the total compensation including benefits such as medical, retirement, personal time off, and special perks?	
	Do you evaluate the current market regarding salary levels in your industry?	
	What benefits do you offer your employees related to medical, dental, and retirement?	
	Are you satisfied with your benefit offerings?	

Training and Development	What training programs does your company offer or promote?	
	How do these programs support a career development path?	
Retaining Top Talent	Are you successfully hiring top talent and is it a priority?	
	What is your turnover rate for employee retention?	
	What is the real reason for employees leaving?	
	How would your employees describe your company culture?	
	Is your manaagement team successful at motivating and engaging employees?	
Managing Risk	What areas of concern do you have regarding risks related to your employees?	
	What employment regulations apply to your company?	
	When is the last time you conducted a human resource audit regarding classification of exempt employees, independent contractors, employee personnel files, and I9 processing and documentation?	

Individual Career Development Plan

From *People Power: An Entrepreneur's Guide to Managing Human Capital*

Chapter Seven: Employee Retention and Engagement Strategies



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Meet with your employees and discuss development activities that interest and excite them. Use this form to identify career development opportunities for individual employees:

Employee Name:	
Job Englargement: List additional work tasks and duties to add. List tasks and duties to remove.	
Job Enrichment: List additional responsibilities and control over specific duties or work. These are duties that the employee gains power over the way in which the work will be accomplished.	
Increased Job Responsibilities: List areas where the employee can take a lead or supervisory role. Leading a committee or initiative at work is an example.	
Developmental Assignments: List work assignments where employees can learn new skills and knowledge that they would need for future promotion.	
Job Rotation: Identify a job in the company where the employee can learn new skills and reduce the monotony of their current position.	
Training Activities: List the training activities (online, classroom, and group learning) for the employee to complete.	
Coach/Mentor: Identify someone in the company who will meet with the employee to check progres of the career development and provide feedback. This can be a senior level peer or manager.	

Salary Schedule

From *People Power: An Entrepreneur's Guide to Managing Human Capital*
Chapter Three: Compensation Strategies

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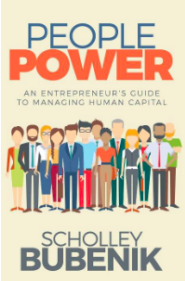

Example:

Job Positions	Job Family	Ranking	Pay Grade
Receptionist	Administrative	1	
Administrative Assistant	Administrative	2	
Office Manager/HR	Human Resources	3	
Director of Operations	Operations	4	
	Finance		
	Technical		

Complete your salary schedule by listing job positions and salary information:

Job Positions	Job Family	Ranking	Pay Grade

Job Requirements & Traits

From *People Power: An Entrepreneur's Guide to Managing Human Capital*
Chapter Four: Recruiting Starts With the End in Mind

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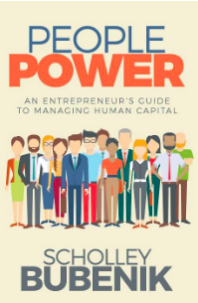

Below is a list of most common job requirements and traits used in behavioral interviewing:

Job and Profile Requirements	Traits Needed
Ability to resolve customer issues	Customer Service
Demonstrates strong ethics and doing what is right	Integrity
Self-Starter	Initiative
Ability to work alone	Autonomy
Adapts well in a fast-paced environment	Flexible
Work collaboratively with team members	Teamwork
Creates a work environment that encourages creative thinking and innovation in the design of programs	Innovation
Ability to figure things out with little supervision	Problem Solving
Good verbal and written communication skills	Communication
Ability to follow through with assignments and good work attendance	Dependability
Successfully learns new processes and systems	Learner
Works well under stress	Adaptability
Accurate	Attention to Detail
Completes work on time and above standards	High Performance
Motivates and develops others	Leadership
Develops new processes and implements change	Strategic
Willing to complete any job assignment / no job is too small	Humility
Ability to build and maintain effective relationships and networks	Sales

Workforce Planning

From *People Power: An Entrepreneur's Guide to Managing Human Capital*
Chapter Four: Recruiting Starts With the End in Mind

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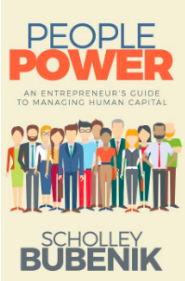

Example workforce plan:

Start Date for New Hire	Need to Hire	Time to Fill	Begin to Recruit
January	Sales	60 days	November
	Customer Service	30 days	December
April	Engineer	45 days	February

Your company workforce plan:

Start Date for New Hire	Need to Hire	Time to Fill	Begin to Recruit