

USING THE FIT FOR PURPOSE FRAMEWORK FOR TEAM ASSESSMENT

An application of the framework for employee retention

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Based on the Fit for Purpose framework by David Anderson and Alexei Zheglov



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Using the Fit for Purpose Framework as Human Resources Tool A Case Study by Anton Manin

How can I really understand my employees and what motivates them to work in their position? How can I gain a new focus on employees while being able to do a proper assessment in just a few days' time? These are the questions I set out to answer by implementing the Fit for Purpose framework at Sberbank.

Background

I work as a competence leader at Sberbank, a major bank in Russia. The group I worked with was customizing one of the biggest Oracle Siebel CRM installations worldwide. They were made up of members of different cross-functional teams. Each team consisted of a product owner, two analysts, four developers, and one or two testers. I turned out to be an IT-area lead of all of the analysts. I was responsible for people development as well as the whole practice. Cross-functional teams shared areas of responsibility at all stages of the corporate customers lifecycle, from acquisition and onboarding to compliant and service requests.

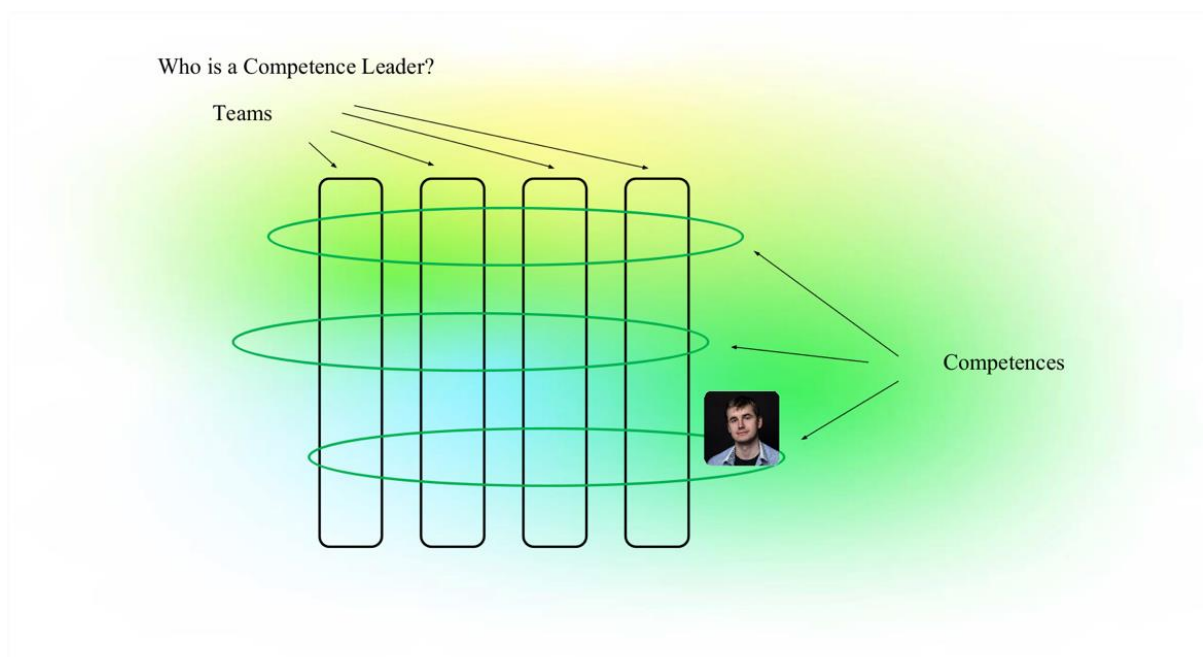


Figure 1: What is a competence leader?

Competence As a Service

To check on my team, I needed answers to several questions.

1. What was the current mood of the analysts?
2. How satisfied are they were their work?
3. Are any of them planning on leaving?

These questions are common ones for employers to have. However, they are all things that can be difficult to gage. Other surveys commonly used by HR departments give mixed results. They tend to not be focused on the employee. Another issue of other survey types such as Net Promoter Score is that they are not actionable. Once the data is collected, there are no next steps telling you how to improve.

In my situation, I knew that team members had some sources of dissatisfaction. However, quick talks did not reveal the essence of these sources. Everything said seemed to be trivial. Ex. The income level is lower than expectations, not every task is unique and fun, there are some miscommunications, etc. I knew I needed to take action, but what was the right move to start? What decision is crucial to be made?

In 2018 I began to read the book *Fit for Purpose: How Modern Businesses Find, Satisfy, and Keep Customers* by David Anderson and Alexei Zheglov. The book inspired me to look at the issue differently. The question I then began to ask myself was, ""What if I competence can be seen as a service for teams?"".

When you work with any system, you have to deal with different people. Every person is unique, and you have to know his/her internal and external motivation and expectations. I decided to use Fit for purpose cards (F₄P Cards) to understand analysts. The model I was working in I defined as "Competence as a Service".

F₄P Cards Processing

If you look at the company from the employee's point of view, you will be able to use F₄P Cards to understand their needs. However, the main trick here is finding the right question to ask in order to eliminate the problem of receiving obvious answers. For my situation, this took about half an hour the first time I prepared my survey. In the end, I decided to proceed with the question 'Why are you working for the company in your current role?'.

Using the F₄P Cards template, a form was created for all analysts to fill out. On the form, they specified up to three main purposes, assessed level of satisfaction and wrote a short narrative. A narrative is very important as it helps to find out the reason and to work with it. I collected the answers during 1-to-1 meetings that took anywhere from 20 minutes up to one hour. It was also a great opportunity to start a discussion with the employee about his/her goals and expectations for the role.

Goals					
1. Became a professional <small>Tell why you choose the company as a place to work. Indicate how fit for purpose you found the place in fulfilling your expectations</small>				✓	
2. Repay the mortgage in 5 years			✓		
3. Make the world a bit better				✓	
Tell why you gave the score for goal 1 Complex tasks and professional colleagues allow me to grow as fast as I want					

Figure 2: F4P card filled out by analysts

The next step after collecting the form result was the clustering of the purposes. I looked at all the survey results I had collected and tried to group them by similarity. This will show the core purposes that employees had. This was an iterative process. I made the mistake of not starting until I had collected all the answers. Knowing what I know now, it is much better to start earlier, such as after the first three or four results. This allows you to clarify a narrative. The main purposes expressed in the cards I collected were:

- "Ambitious tasks"
- "Compensation level"
- "Cool team"
- "Modern office"
- "Work process"
- "Work hours"

Category	Participant	Goal	Level	Narrative
Money		1 Earn money		3 ...
Mission		1 Make people around happy		4 ...
Personal skills growth		1 To be a professional		4 ...
Work hours		2 Stable work hours		5 ...
Office		2 Office location		4 ...
Personal skills growth		2 Interesting tasks		3 ...
Mission		3 To change the world		4 ...
Mission		3 Work for results, not just for wor		5 ...
Money		4 Great salary		5 ...
Money		4 Intangible bonuses		2 ...
Status		4 Status		1 ...
Money		5 Stable salary		4 ...
Personal skills growth		5 Ability to learn		3 ...
Team		5 Professional team		4 ...
Status		6 To be successfull		5 ...
Money		6 To have a great salary		4 ...
Status		6 Position		5 ...

Figure 3 Clustering of results

Throughout the process I realized that by asking about employee purposes you can discover new and important things that have not come up before. *Ex. work hours really matter because of small children.* A person cannot work late and has to leave in time. In this case it is a real purpose -- to be able to meet a kid after school. From this purpose, you can learn a bit more about the constraints of the employee.

From the narrative, you discover other information. For example, someone surveyed had no promotion for years, but he/she has never asked for more responsibility or a difficult task. On one hand, if you have the means and reason to promote your employees, you will do it. However, some employees might not take initiative to search for the promotion they desire. By knowing this desire, you now can start a meaningful conversation with this employee to help them reach their goal. You can describe the current options and create a development plan for the upcoming year or longer term.

Calculations

After collecting results, it was time for some easy calculations. For each category, I calculated the percentage of the number of respondents for each satisfaction level. 1-2 is negative, 3 is neutral and 4-5 is positive feedback. Depending on the sum for each one, you can see the level of satisfaction for the category and discover the reasons in a linked narrative. This allows you to understand the context of the employee by understanding what leading motivation he/she has. I decided to normalize the scores in each category to get numbers from 0% to 100%. By doing this, the category gets a weight. For example, the category "Ambitious tasks" has 10 responses. Therefore, its weight is 10 and this side of the work process is more important than "work hours" with 1 response.

The next step is to define for each category if it is important to the company. Sometimes you can't change things easily. E.g., Responses resulted in an "office location" category with 1 response. You would not move the office just to meet the expectations of one employee. In that case, you need to look for other options; partly remote work, flexible working hours, or communicate that company has no plans to move. The narrative will help to understand why office location is important to the employee.

Categories	# votes	+	neutral	-	+	neutral	-
Money	5	60%	20%	20%	3	1	1
Mission	3	100%	0%	0%	3	0	0
Personal skills growth	3	33%	67%	0%	1	2	0
Work hours	1	100%	0%	0%	1	0	0
Office	1	100%	0%	0%	1	0	0
Status	3	67%	0%	33%	2	0	1
Team	1	100%	0%	0%	1	0	0

Figure 4 Calculations

A great advantage of the F4P framework is the visualization the decision matrix brings and its help to guide you through what to do with each category. To get started, I placed each of the categories based where on the satisfaction and alignment with company strategy. If the category is aligned with the company strategy and the level of satisfaction is low, you define the next steps based on narratives. Negative feedback allows disclosing pain points and blind spots to elaborate. Positive feedback shows existing advantages to keep them strong. If the category doesn't help to reach goals, you can "turn it off" to correct employee expectations. E.g., category is "work travel" when the company is local and there is no reason for business trips outside a country. This approach helps to keep the focus on categories that make sense for more employees at one hand and aligned with the company's goals and trends at the other hand.

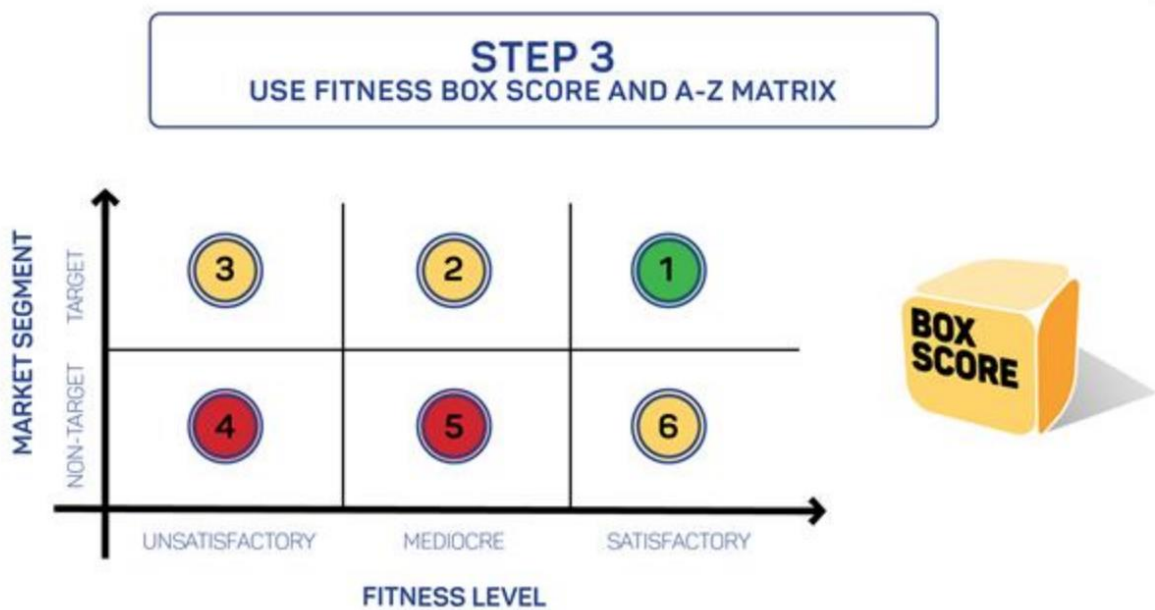


Figure 5 F4P Decision Matrix

Results

The results of the project exceeded my expectations. In just a few days, I collected enough information to make the necessary decisions. I learned more about the employees and the F4P framework provided me with actionable next steps. I would summarize the benefits of using the framework as an HR tool as the following:

1. The framework allows you to start to find a way to improvement fast. You are quickly able to find different topics to discuss that focus on the employees, not on his or her competencies.
2. The framework can be combined with 1-to-1 meetings. The three main purposes can be used as an agenda to have a productive meeting.
3. The method is much more actionable than NPS or employee CSI.
4. You can see expectations that the company is not meeting. It starts an honest discussion about the gap between the company's culture and the employee's expectations. It is a chance to make loss more predictable and less painful for both sides.

Although the framework brought forth many benefits for my situation, it is important to understand that there is no "silver bullet" when it comes to frameworks or methods. To summarize the disadvantages of the method:

1. It is not as easy as it sounds to come up with the right question. The first 15 versions of the question I came up with were too obvious. To overcome this, it is important to be patient and to try to answer the question yourself.
2. Clustering is not objective. Whoever interprets the results can influence them. It is important to have some iterations to find better clusters.
3. You must have a solid level of trust. With no trust, you will get false answers about happy and motivated people that are unrealistic.

F4P is not the only method but it is very useful and actionable. One could define the gap between the current state and the perfect future, define the next steps to achieve it and check regularly progress against the previous measurement. Clustering is a nice way to define non-target directions. Treating a company as a service for employees opens new perspectives to win-win collaboration.