Retention strategies for the people who build value

Use this sheet to prepare a conversation with your appropriately qualified professionals. Write down the decision you want to make and what information is still missing.

01 What specific business need is the award intended to address?

02 Does the participant understand and have influence over the performance measures?

03 What legal, tax and employee-benefit rules apply before we make the promise?

04 How will payments be funded under both expected and difficult circumstances?

05 What happens on departure, disability, death or a change in ownership?

LEAVE WITH AN AGREED NEXT STEP

Decision / information needed: _____

Person responsible: _____ Review date: _____

General education only. This is not individualized investment, tax, legal or insurance advice. No advisor relationship or introduction is created by using this sheet. Confirm the scope and responsibilities with each professional.