

UNDERSTANDING THE NEW WORKFORCE

Leadership Toolkit

*10 Practical Tools for Recruiting, Motivating, Developing, and
Retaining Today's Employees*

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Companion to Understanding the New Workforce
Evidence-Based Leadership for Recruiting, Motivating, and Retaining Today's
Employees

How to Use This Toolkit

These tools are designed to convert the book's leadership principles into repeatable management practices. They are not tests and they are not substitutes for judgment. Use them to slow down assumptions, create clearer conversations, and improve follow-through.

- Use the diagnostic tools before jumping to a solution.
- Use the conversation guides to prepare, not to script every word.
- Use the scorecards to identify patterns, not to label people.
- Repeat the same tools over time so you can see whether leadership behavior is changing.
- Whenever possible, end with a specific owner, action, deadline, and follow-up.

The 10 Tools

	Tool	Primary Use
1	Workforce Problem Diagnostic	Diagnose before prescribing.
2	Assumption vs. Evidence Worksheet	Separate what you know from what you think.
3	Six-Principle Leadership Self-Assessment	Evaluate your daily leadership practice.
4	Employee Motivation Diagnostic	Identify what is strengthening or eroding commitment.
5	One-on-One Coaching Guide	Turn supervision into development.
6	Team Effectiveness Scorecard & Norms Builder	Build trust, conflict, accountability, and purpose.
7	Accountability Conversation Planner	Correct behavior while preserving dignity.
8	Change Communication Planner	Reduce uncertainty with clarity and consistency.
9	Stay Interview & Retention Guide	Find problems while you can still fix them.
10	Meeting-to-Execution Tracker	Turn discussion into ownership and results.

1. Workforce Problem Diagnostic

Book connection: Chapters 1-2

Use this before deciding that a workforce problem is caused by attitude, work ethic, compensation, or a particular generation. The objective is diagnosis before prescription.

A. Define the Symptom

- High turnover
- Open positions / recruiting difficulty
- Early-tenure resignations
- Low engagement
- Burnout
- Attendance / reliability problems
- Performance problems
- Conflict
- Low initiative
- Other: _____

What is happening, stated only in observable terms?

How large is the problem? Include data, dates, departments, roles, or trends if available.

B. Test the Possible Causes

Possible Cause	Likelihood	What Evidence Do We Have?
Compensation / benefits	Low / Med / High	Evidence for: _____ Evidence against: _____
Supervisor or leadership behavior	Low / Med / High	Evidence for: _____ Evidence against: _____
Unclear expectations	Low / Med / High	Evidence for: _____ Evidence against: _____
Weak onboarding	Low / Med / High	Evidence for: _____ Evidence against: _____
Workload / capacity	Low / Med / High	Evidence for: _____ Evidence against: _____
Scheduling / flexibility	Low / Med / High	Evidence for: _____ Evidence against: _____
Career development	Low / Med / High	Evidence for: _____ Evidence against: _____
Recognition	Low / Med / High	Evidence for: _____ Evidence against: _____
Communication	Low / Med / High	Evidence for: _____ Evidence against: _____
Unfair or inconsistent accountability	Low / Med / High	Evidence for: _____ Evidence against: _____

Possible Cause	Likelihood	What Evidence Do We Have?
Process barriers	Low / Med / High	Evidence for: _____ Evidence against: _____
Role design / job demands	Low / Med / High	Evidence for: _____ Evidence against: _____
Labor-market conditions	Low / Med / High	Evidence for: _____ Evidence against: _____
Employee-specific factors	Low / Med / High	Evidence for: _____ Evidence against: _____

What information are we still missing?

What would we expect to see if our leading explanation is actually correct?

What is the smallest reasonable action or test we can take before launching a large solution?

2. Assumption vs. Evidence Worksheet

Book connection: Chapters 1-4

Use this when a leader or team has become very certain about why an employee, department, or workforce issue is occurring. The goal is disciplined curiosity.

The conclusion we are currently leaning toward:

Category	Standard	Notes
What we KNOW	Facts, data, direct observations, documented events.	
What we THINK	Interpretations, explanations, beliefs, judgments.	
What we are MISSING	Questions we have not answered, people we have not asked, data we do not have.	
What would CHANGE our mind	Evidence that would cause us to revise the conclusion.	

Bias Check

- Am I generalizing from one or two memorable experiences?
- Am I interpreting a preference as a performance problem?
- Am I assuming intent without asking?
- Am I using a generational label as an explanation?
- Am I comparing a new employee to the leader I became after years of experience?
- Am I only looking for evidence that supports my first conclusion?

A better question we should be asking:

Next information-gathering step:

3. Six-Principle Leadership Self-Assessment

Book connection: Chapters 1, 4 and throughout the book

Rate what employees actually experience from you, not what you intend.
Use a 1-5 scale: 1 = rarely true, 3 = inconsistent, 5 = consistently true.

Trust

Leadership Behavior	Rating	Evidence / Example
I do what I say I will do.	1 2 3 4 5	
Employees can bring me bad news without fearing an emotional reaction.	1 2 3 4 5	
I give capable people appropriate autonomy.	1 2 3 4 5	
I explain decisions honestly when I can.	1 2 3 4 5	

Communication

Leadership Behavior	Rating	Evidence / Example
I make expectations unmistakably clear.	1 2 3 4 5	
I match the communication method to the need, not my personal preference.	1 2 3 4 5	
I give information early enough for people to act on it.	1 2 3 4 5	
I check for understanding instead of assuming it.	1 2 3 4 5	

Sound Decision Making

Leadership Behavior	Rating	Evidence / Example
I separate facts from assumptions.	1 2 3 4 5	
I seek contrary views before major decisions.	1 2 3 4 5	
I slow down when the issue is complex or emotionally charged.	1 2 3 4 5	
I can explain the reasoning behind important decisions.	1 2 3 4 5	

Accountability

Leadership Behavior	Rating	Evidence / Example
Standards are clear before I enforce them.	1 2 3 4 5	
I address performance problems early.	1 2 3 4 5	
I apply standards consistently and explain legitimate differences.	1 2 3 4 5	
I correct behavior without attacking identity.	1 2 3 4 5	

Developing People

Leadership Behavior	Rating	Evidence / Example
I hold regular coaching conversations.	1 2 3 4 5	
I delegate judgment and decisions, not just tasks.	1 2 3 4 5	
I create opportunities for employees to learn and stretch.	1 2 3 4 5	
I notice improvement and discuss future growth.	1 2 3 4 5	

Execution

Leadership Behavior	Rating	Evidence / Example
I make priorities clear.	1 2 3 4 5	
Meetings end with ownership and deadlines.	1 2 3 4 5	
I follow up on commitments.	1 2 3 4 5	
I protect time for important work instead of filling calendars with activity.	1 2 3 4 5	

My strongest leadership principle right now:

The principle creating the most risk for my team:

One behavior I will change over the next 30 days:

4. Employee Motivation Diagnostic

Book connection: Chapter 5

Use this when motivation, engagement, initiative, or commitment appears to be declining. The purpose is to investigate the work environment before labeling the employee as unmotivated.

A. Motivation Conditions

Condition	Diagnostic Question	Rating	Evidence / Example
Autonomy	Does the employee have meaningful control over how appropriate work gets done?	1 2 3 4 5	
Mastery / Competence	Is the employee learning, improving, and receiving useful feedback?	1 2 3 4 5	
Purpose	Can the employee connect daily work to a meaningful outcome or mission?	1 2 3 4 5	
Fairness	Do workload, recognition, opportunity, and accountability feel reasonably fair?	1 2 3 4 5	
Recognition	Does someone notice specific contributions and good work?	1 2 3 4 5	
Connection	Does the employee feel respected, included, and supported by the team and leader?	1 2 3 4 5	
Growth	Can the employee see a future that includes new skills, challenges, or opportunities?	1 2 3 4 5	
Clarity	Are priorities, standards, and success clearly defined?	1 2 3 4 5	
Sustainable Workload	Is the workload demanding but realistically manageable over time?	1 2 3 4 5	

B. Early Warning Signs

- Ideas and suggestions have become less frequent.
- Participation in meetings has dropped.
- Communication has become shorter or more withdrawn.
- Initiative has faded.
- Energy or enthusiasm has noticeably shifted.
- Attendance or punctuality has changed.
- The employee is doing only what is required.
- The employee has stopped asking about development or future opportunities.
- Frustration about fairness, workload, or leadership is recurring.

What changed? Identify the approximate point when the shift began.

Which motivation condition above appears most affected?

What part of this situation is within leadership's influence?

C. 30-Day Motivation Action

Action Area	Specific Commitment
Leadership behavior to change	
Employee conversation to hold	
Barrier to remove	
Development or autonomy opportunity	
Recognition to provide	
Date to review whether anything improved	

5. One-on-One Coaching Guide

Book connection: Chapter 6

Use this for regular development-focused one-on-ones. The leader should ask more questions than they answer and leave with a clear follow-up.

Employee: _____ Date: _____ Next check-in: _____

1. Start With the Employee

What is going well right now?

What is getting in the way of your best work?

What is taking more time or energy than it should?

2. Coach the Thinking

What have you already tried?

What options do you see?

If you had to recommend a decision, what would you recommend and why?

3. Develop Capability

What do you want to learn or get better at next?

What decision, project, or responsibility could I let you own?

What support, feedback, or access would help?

4. Close With Clarity

Follow the examples:

Commitment	Ownership	Timing
Employee action	Owner: Employee	Due:
Leader action	Owner: Leader	Due:
Follow-up question	How will we know progress occurred?	Date:
Commitment	Ownership	Timing

Leader reminder: protect one-on-ones. Repeated cancellations communicate that development is optional, even when that is not the message you intend.

6. Team Effectiveness Scorecard & Norms Builder

Book connection: Chapter 7

Use this with a leadership team or workgroup. Rate the team first, then explicitly define the behaviors the team wants to become normal.

A. Team Effectiveness Scorecard

Foundation	What Strong Looks Like	Rating	Evidence
Trust	People do what they say, share concerns honestly, and assume reasonable intent.	1 2 3 4 5	
Psychological Safety	People can ask questions, admit uncertainty, raise concerns, and challenge ideas respectfully.	1 2 3 4 5	
Healthy Conflict	Disagreement is used to improve thinking instead of being avoided or personalized.	1 2 3 4 5	
Commitment	After decisions are made, people support the direction and know what they own.	1 2 3 4 5	
Accountability	Standards are visible, consistent, and protected by leaders and peers.	1 2 3 4 5	
Communication	Information is clear, timely, and matched to the needs of the team.	1 2 3 4 5	
Shared Purpose	People understand why the work matters and how their contribution connects to the larger mission.	1 2 3 4 5	

Which foundation is currently limiting team performance the most?

B. Team Norms Builder

What behaviors **SHOULD** define this team? Be observable and specific.

Which of those behaviors are we **ACTUALLY** demonstrating consistently?

Where is the largest gap between what we say matters and what we tolerate?

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C. Convert Values Into Norms

Area	Our Team Norm	What It Looks Like in Practice
Meetings	We will...	
Communication	We will...	
Disagreement	We will...	
Deadlines	We will...	
Mistakes	We will...	
Accountability	We will...	
Recognition	We will...	

D. Groupthink Check for Major Decisions

- We deliberately asked, "What are we missing?"
- We asked, "Who sees this differently?"
- At least one credible alternative was considered.
- Risks and unintended consequences were discussed.
- People could disagree without being punished for disagreeing.

7. Accountability Conversation Planner

Book connection: Chapter 7

Use this before a difficult performance conversation. The aim is high expectations plus high support: correct the behavior, preserve dignity, and make success next time unmistakable.

A. Establish the Facts

What specific, observable behavior or result needs to change? Avoid labels such as lazy, unreliable, negative, or unprofessional.

What standard, expectation, policy, commitment, or deadline applies?

What impact did the behavior have on the work, team, client/customer, or organization?

B. Fairness and Consistency Check

- The expectation was communicated before this conversation.
- The employee had the training/resources reasonably needed to succeed.
- I have checked whether similar situations were handled consistently.
- Any different treatment can be explained by a legitimate difference in circumstances.
- I am addressing behavior, not attacking character or identity.

Relevant context I need to understand before concluding why this happened:

C. Plan the Conversation

Step	Purpose	My Notes
1. Describe	State the observable facts without exaggeration.	
2. Listen	Ask what happened and what information you may be missing.	
3. Re-state the standard	Make the expected level of performance clear.	
4. Look forward	Ask: "What will success look like next time?"	
5. Support	Ask what support or obstacles need to be addressed.	
6. Commit	Define the employee action, leader action, measure, and deadline.	
7. Follow up	Set a specific date and actually return to the issue.	

D. Outcome and Follow-Up

Item	Agreement
Expected behavior/result	
Employee commitment	
Leader support	
How success will be measured	
Follow-up date	
If improvement does not occur, next step	

8. Change Communication Planner

Book connection: Chapter 8

Use this before and during significant organizational change. People often react to uncertainty more than to the change itself, so the communication plan should reduce avoidable uncertainty without pretending every answer is known.

A. Explain the Why Before the What

What problem are we solving, and why is change necessary now?

What is changing?

What is NOT changing?

B. Uncertainty Map

Uncertainty Area	Likely Concern	Leadership Response
Job / role security	What are employees likely wondering?	What can we say now?
Ability to succeed	What skills, training, or expectations may feel uncertain?	
Reporting / relationships	What relationship or authority changes may create concern?	
Work process / workload	What will become harder before it becomes easier?	
Timing	What milestones or dates can we make visible?	
Unknowns	What do we genuinely not know yet?	

C. Communication Cadence

Communication	Owner	Date / Frequency	Channel
Initial announcement			
Manager cascade			
Employee Q&A			
Progress update			
Decision / milestone update			

D. Consistency Check

- All leaders are using the same core facts and rationale.
- Managers know what they may decide locally and what they may not.
- We have identified respected informal influencers and involved them appropriately.
- We have a way for employees to ask questions safely.
- We will communicate again even if the next update is, "We do not have that answer yet."

The next question employees are likely to ask after our first message:

9. Stay Interview & Retention Guide

Book connection: Chapter 9

Use this before an employee has decided to leave. This is not a performance review. The objective is to understand the employee's experience while leadership still has room to strengthen it.

Employee: _____ Role: _____ Date: _____

A. Core Stay Interview Questions

What part of your work gives you the most satisfaction?

What frustrates you most about working here?

Is anything getting in the way of your best work?

What would make this an even better place to work?

What do you want to learn or become better at next?

Do you feel your work and contributions are noticed? What kind of recognition matters to you?

What is one thing I could do differently as your leader that would improve your work experience?

Have you thought about leaving recently? If so, what prompted it?

What would make you more likely to still want to be here one year from now?

B. Retention Risk Scan

Potential Risk	Risk Level	Evidence / Employee Comment
Leadership relationship	Low / Med / High	
Growth / development	Low / Med / High	
Workload / burnout	Low / Med / High	
Pay / benefits	Low / Med / High	
Schedule / flexibility	Low / Med / High	
Fairness / accountability	Low / Med / High	
Recognition	Low / Med / High	
Team / culture	Low / Med / High	
Role fit / purpose	Low / Med / High	
External opportunity	Low / Med / High	

C. Retention Commitments

Area	Specific Action / Response
What leadership can reasonably fix now	
What requires a longer-term solution	
What we cannot promise or change	
Development opportunity to create	
Recognition or feedback to provide	
Leader commitment	
Employee commitment	
Follow-up date	

10. Meeting-to-Execution Tracker

Book connection: Chapter 11

Use this at the end of meetings, planning sessions, and leadership discussions. Conversation creates value only when it produces clarity, ownership, action, and follow-through.

A. Meeting Purpose

What specific decision, problem, or outcome must be clearer when this meeting ends?

What does NOT need to be discussed today?

B. Decisions Made

Decision	Reason / Key Constraint	Who Needs to Know?

C. Action Tracker

WHAT will be done	WHO owns it	WHEN is it due	HOW progress is measured	STATUS / Barrier

D. Execution Discipline Check

- Every action has one clearly named owner.
- Every action has a deadline or review date.
- Priorities are limited enough that the team has realistic capacity.
- Known barriers were identified rather than left for later.
- A follow-up mechanism is already scheduled.
- The meeting created more clarity than it created work.

What is the single most important action coming out of this meeting?

What will we stop, defer, or deprioritize to protect capacity for this work?

Next review date and format:

E. 30-Day Execution Review

Measure	Result	What This Tells Us
Commitments completed on time		
Commitments still open		
Commitments with unclear ownership		
Priorities added after the meeting		
Meetings/actions that could have been eliminated		