Is your client's business problem a people problem?

Whether it's stagnant revenues, a drop in customer retention rate, or an inability to win new business, your client relies on you to help solve their most pressing business problems.

Your client might not know their business problems boil down to people problems. When working with your client to diagnose their business issues, use this checklist as a guide. It will help you determine if the source of their challenge can be solved through their talent strategy.

The process works in two phases.

1. People data collection phase

Your client should already have all the business data they need, be it financial or customer satisfaction. The next step is to collect people data from existing employees to see if there's any correlation.

- ☐ **Uncover and share behavioral profiles:** This will help your client understand who's best suited for a job and evaluate if they're being managed appropriately. Behavioral alignment can impact engagement, performance, and ultimately business results. Tools: behavioral assessments; personality assessments; leadership assessments.

- ☐ **Evaluate job performance:** This data distinguishes between who's exceling and who's struggling. Job performance data can also help you identify which behavioral drives are shared among top performers. Tools: 360 reviews; quarterly reviews; progress checks.

- ☐ **Check on organizational and team culture:** This data identifies how it feels to work at your organization and which behaviors and attitudes are rewarded. Tools: survey bots; anonymous feedback requests; morale check-ins.

- ☐ **Monitor employee engagement:** Engagement data is collected directly from your employees and is helpful in diagnosing misalignment between employees and their job, their managers, their colleagues, and your organization. Tool: employee experience survey.

2. Data analysis phase

Once your client's people data is collected, help them analyze it against their existing business problems to see if there are any correlations (i.e., skills gap, disengagement, etc.)

- ☐ **Examine the magnitude of the problem:** Some problems can be solved over time, but others require urgent action to prevent further fallout. Advise your client to use their best judgment in prioritizing.

- ☐ **Determine the relevance:** Were the findings related to the business problem? If a product is slow to launch and your client's product and engineering teams are disengaged, the answer is yes.

- ☐ **Determine how widespread the problem is:** If a problem is pervasive throughout the organization, prioritize it. If it's isolated to one respondent or team, tackle it on an individual or team level.

- ☐ **Check for repetition:** Are there any common threads? If low engagement is a concern, see if it's true for all teams of the same size or with the same level of workload.

Once you've gone through this checklist with your client, you can start to work with them on prescribing improvement actions so they can turn around their business problem.