
POSITIVE RETENTION REPORT



Introduction

Following the publication in 2022 of the MRS research into Talent and Wellbeing in the research and insight sector, entitled "*Wellbeing in Research*", a working group was set up to explore challenges in our sector that could affect employee recruitment and retention.

Within this working group, a workstream was established to focus on 'positive retention'. The remit here was to draw fresh learnings across the sector today on what factors are believed to help research agencies retain their staff.

While pay is an important factor in recruitment and retention – and all the more so in today's inflationary context – this workstream sought to look more widely than financials. And it's worth calling out the word 'positive' here. We are well aware that staff remain in their organisations for a wide range of reasons, and it's not an active decision to remain rather than resign every day. Natural inertia plays its role.

We are therefore purposely focusing on the idea of 'positive retention' because this looks beyond passively retaining staff regardless of satisfaction. To seek to 'positively retain' our employees puts more emphasis on employers making an effort to ensure staff are genuinely satisfied, learning and developing, and feel valued as well as having a sense of belonging in their roles. Ultimately, that they can see a future they wish to be part of in their organisations.

We must also acknowledge that what research agencies do with the aim of retaining their staff is only part of the picture. What research agencies put in place may not necessarily be what employees ultimately value. Indeed there may well be a gap between employer intent and employee response. This is where other initiatives from MRS come into play, such as the new Employee Satisfaction Survey currently being developed.

This paper represents one input therefore, to be considered alongside other MRS resources available. The intention is to help managers and employers to consider what 'positive retention' best practice looks like in 2023 in an Insight agency.

Our findings have been agency-focussed and the report is targeted at research agency leaders, though hopefully there will be useful learnings and common ground for people working client-side too.

Through this we seek to offer some inspiration, stimulus and practical prompts for leadership teams across our sector to consider. In the report below we highlight practical suggestions for consideration in addition to the team need which is creating the impetus for each theme covered.

Hopefully this will help make our collective sector a happier, healthier & more productive sector in which to work – so the amazing team of colleagues we work with each day don't look elsewhere outside our profession, and we lose that collectively precious talent.

The inputs into this report include the agency management experience of all the members of the MRS working group, plus the input of agency leaders who kindly spoke to us from the following agencies: Acumen, Blue Yonder, Flume, IDI, Kadence International, Love Brands, PA Consulting, STRAT7 Researchbods, The Nursery and Zappi. Thank you to everyone who took part.

Across everyone we spoke to there were common best practice patterns in terms of both 2023 management philosophy, and tangible actions

Below we have listed both the management philosophy strands, and the associated actions. This would seem to be what constitutes best practice in the sector.

Why do people leave?

Let's start by understanding why people do leave – this is important context.

We cannot ignore this in any serious study of Retention. In general, there are five (perhaps perennial) reasons which account for people moving on in their careers – the 5 Ps....

- **Personal life changes.** Fundamental changes to people's lifestyle, family circumstances or aspirations. Flexible, remote working is now firmly in this bucket – and can either be a deal-breaker, or incentive. Flexible and remote working is very much part of the 2023 conversation.
- **Pay rises.** We are a highly skilled profession managing demands to maintain quality output and client service levels. Not to mention the wider UK economic context of inflation which is playing an important role here.
- **Promotion.** Responding to and satisfying everyone's aspirations for career progression and recognition remains crucial to running a successful organisation.
- **Pressure.** Workload becomes a reason to leave when there are simply too many projects, for too long, with little light at the end of the tunnel. This is a key issue when lack of resource at a certain level requires seniors stepping down and juniors stepping up – so not just volume of work, but also working correctly within job descriptions.
- **Purpose.** Team members are motivated by the type of work they do, and why they are doing it. This encompasses working on projects with positive social impact, and also working for an organisation that actively thinks about its corporate values and team ethos.

These may not necessarily be new reasons to leave – most of these have been around for decades – the key difference in 2023 is that ‘post-pandemic’ both employees and agency management are now much more open and clearer about their expectations for the relationship to be a success. As in all relationships, high-quality two-way communication has become paramount. And the listening process ought to be continual, not occasional.

Consider

Flexible working conversations for all staff, bespoke benefits and working arrangements, promotions and pay rises only once or twice per year to create stable rhythm & expectations.

Team Need

My personal needs are important, and I deserve being rewarded for everything I have given.

The changed retention context

Remote Working & Era of New Trust

It is clear that in 2023 all research agencies are adapting to a completely new societal context in light of the Covid-19 pandemic. In the broadest terms, staff are demanding that their personal needs are met to a much greater degree than previously. This contextual change sets the framework for positive Retention considerations in our sector.

The most obvious and tangible manifestation of this new context is remote, hybrid, & flexible working - which has been embraced to a greater or lesser degree across the sector. People are now being asked, gently, to come into the office between 1-3 days per week. This has brought with it a new era of trust between senior management teams and the wider agency teams. The Insight sector has long been characterised by evening qual fieldwork and late-night debrief writing for presentation the next morning. This fluidity in terms of working hours and working practices is now being acknowledged and greater trust is needing to flow.

Furthermore, increased video conference tech interactions and online qual capability has simply changed the practical realities of doing the job. This also includes reduced travel both within the UK and internationally. There are operational challenges such as how to co-ordinate teams, and how to manage hybrid meetings where half the team are in the meeting room, and the other half are engaging remotely.

It is worth saying that remote & hybrid working practice is still in a state of flux in our sector – whilst research agencies have each arrived at something which meets the needs of their specific businesses, it is still a work in progress. Our sense is that the picture is evolving on a month-by-month basis as expectations change both agency and clientside. Furthermore, different factors impinge across the year, such as high fuel bills in winter making staying at home less attractive, school holidays meaning more need for flexibility to be in and around home. As well as increasing mortgage rates tightening belts generally at present.

The personal and professional are inevitably more intertwined in a flexible, hybrid world. And our best advice would be to keep communication channels open between research agency managers and the wider team – this train is still travelling down the track.

Consider

Any 1-3 days per week in-office, specialist teams choosing day to meet in-office, cross-silo training one day per month.

Team Need

Trust me!

Effective management enablers

Head of People

One striking feature of the research agencies we spoke to was the commitment to senior management resource. It is now normal to have a Head of People on the senior management team of medium-sized agencies, and one agency we spoke to had appointed their Head of People to the MD role in order to cement their People processes and behaviours at the core of operations.

It is also important to report that 'People' roles are being distinguished from more traditional 'HR' functions, with HR tending to be relied on for exceptional circumstances whereas People roles are being integrated into the core leadership team to decide on every day, business-as-usual, cross-organisational behaviours. Typically mid-sized research agencies have 2 x full-time-equivalent People roles to fulfil best practice needs.

Consider

Having a People Lead on the senior management team. Are People processes integral to everyday decisions such as project resource allocation?

Team Need

My personal needs are not peripheral - they are central to my agency and sector experience.

KPIs

It is now also common practice to monitor employee satisfaction and attitudes over time. Research agencies are using platforms to collect data on a monthly or quarterly basis, and results are used as agency KPI's. It is worth looking again at MRS resources for this. (MRS Leadership & Culture workstream have also published insight and ideas on Amplifying Colleague Voices).

Consider

Choosing the most important team KPI and measuring it monthly, EDI annual survey.

Team Need

Show me this matters to you - if you care about it, you'll measure it.

Benefit packages

Benefits packages have improved significantly over recent years - not least driven by the increased focus on staff retention, staff welfare during the pandemic, and structured frameworks.

Consider

Paternity and maternity benefits, dentistry insurance, wellbeing days, miscarriage policy, fertility loan, flexible benefits policies, bereavement needs, child's 1st day of school day-off.

Team Need

My wellbeing and health is paramount. And the key moments in my life - and my family's life - are very important to me, my wellbeing and my motivation.

Structured Frameworks

It is not enough to simply create a new policy or initiative as a one-off good idea. The best-practice research agency will put in place staff-focussed management frameworks to help define and structure processes. This might be an external reference point, such as Service Profit Chain¹ – the Harvard Business School framework which begins with the 'support your team' principle. Or it might be ISO or Investors in People.

At a more developed level it is B Corp accreditation, the Mindful Business Charter, or in one example the research agency had become an Employee-Owned Trust (EOT).

The learning is that these structured frameworks sit at the heart of the organisation and management team thinking, informing everything that the research agency does. The frameworks themselves become helpful in providing self-organising habits and general guidance across many specific circumstances the team encounter.

And by committing publicly to a framework such as B Corp, you symbolise your commitment to your existing staff, clients & the wider community. And this helps retain staff.

"You are now making it so hard for me to ever leave!" as one research agency leader was told by a smiling team member.

Consider

Applying management frameworks from industry books, B Corp etc.

Team Need

I need to know where we are going as a team.

Seeing a future

Career Planning

Members of the team take their careers seriously and have increasing expectations of training, development, new learning and mentoring. This is all part and parcel of the evolving relationship between modern employer and employee.

Leading-edge practice is now to provide one-to-one career planning and individual career plans for everyone in the organisation, every year.

More broadly, the increased demands on the modern research agency collective experience does not mean that traditional line-management is outmoded. Quite the opposite – both for career development purposes, and simply ensuring the trains run on time when working remotely – line management reporting and care is crucial to retaining talent.

Consider

Individual career plans for all staff, senior management coaching programs.

Team Need

Do you take my career as seriously as I do?

Training & new skills

Training came up as an important topic in this study. This included MRS courses and certificates, which were called out as motivators for staff.

Everyone is conscious of how rapidly our MR world is changing – whether that is AI, ResTec, Service Design, UX or Behavioural Science. A high-performing research agency which is going to retain staff needs to offer developmental opportunities and upskill their team in these kind of areas, as relevant to their business needs.

We also heard of mentoring and coaching being offered to senior management teams, and one example of a Women in Leadership program.

Cross-silo craft skill training also features strongly on how teams are using 'in-office' days. Staff are keen to learn new things! Even through to all-staff Finance teach-ins by FDs – it is all valuable knowledge in a world where commercial skills are desirable.

One important gap for our sector which was identified is professional 'modelling'. Video conference calls can be a barrier. We heard scenarios of trainees being unaware they needed to take notes on calls, because they had never seen anyone else do it. And people asking their line manager if it was ok to go to the pub together after work – again because they had never seen it happen.

Consider

New skills talks from adjacent sectors, MRS certificates, leadership coaching.

Team Need

I want to learn. I want to get better to maintain relevance in an exciting, changing marketplace. I need to demonstrate new skills attained on my LinkedIn.

Culture – embodying values

EDI

Equality, equity, diversity and inclusion are integral to the thinking and practices at all research agencies we spoke to in developing this report. It is now widespread to have EDI committees and groups to develop policy initiatives and engagement within the organisation. Training and education also feature strongly, with initiatives such as Allyship training, and all-staff sessions on topics such as Neurodiversity, Menopause and Black History. Partnerships with external organisations such as 10,000 Interns Foundation, who champion under-represented talent at scale, were also being entered into.

Consider

Celebrating religious festivals across the year, 'blind' recruitment process, apprenticeship scheme, partnerships.

Team Need

I want to be part of an organisation where everyone is included and treated equally, and which embraces these values.

Financial Transparency

Financial transparency was another strong theme coming through. Research agencies are embracing the need to be open with their whole team in order to create 360-degree understanding. Common practices includes sharing monthly or quarterly data with all staff. This can be simply top-line sales targets and actual income, but also extends to reporting EBITDA. Importantly, embracing transparency also requires consistency - bad months needs to be shared, not just the good months!

Consider

Which financial measures shared monthly will be beneficial. Training other team-members about finance. What is the optimum reporting & sharing frequency?

Team Need

I want to be trusted, and I want to understand as much as possible.
New skills please!

Culture – the experiential side

“Reasons to Come in”

One refrain heard across the sector is the importance of creating reasons to gather the team in the office. The realities of the new hybrid flex-world is that people have to decide between the travel+coffee+lunch expense of coming into work vs. the benefits of meeting face-to-face in the office. Research agencies are using one day per week/fortnight/month as the designated day for training sessions and EDI initiatives and management updates.

Much thought is going in to making office *days* “worth coming in for” with “not-strictly-necessary opportunities to be in”. Research agencies are thinking beyond the slippery commercial slope where workers feel they are just executing project after project after project. There needs to be more purpose to the collective research agency when teams come together centrally in the office.

Consider

Specialist team cross-silo training, EDI education days, guest speakers, modelling behaviour training.

Team Need

Today will literally cost me £50 to go in the office. What’s happening to make it worth me going in?

Social Glue

Now the team are WFH much of the time, social togetherness and cohesion is very important. Research agencies and teams themselves are finding different ways to stick together, share ideas and support each other. Taking over from the online quizzes which we remember fondly (or not!) from lockdown, teams are using online platforms to create cohesion. We heard about using Slack, Teams and other platforms to connect across the team, across the day. With people awarding each other Kudos points (an employee recognition platform) or Tacos (on Slack) to reward good deeds and successes.

Similarly face-to-face team socialising is evolving – with a renewed focus on inclusive team events. Importantly these sometimes avoid alcohol, or physical/sporting activity, to prevent the risk of excluding people and to challenge assumptions about the agency’s social behaviour. The ‘Team’ is being thought about carefully, actively, happily and inclusively.

Consider

Online platform for creating team cohesion, £20 Amazon vouchers for monthly winner, social events not in pub/restaurant.

Team Need

I want to feel part of team, healthily! I want everyone in my team to feel included. I want to do something new and different.

KitKats & Oat Milk

Once seen as a ‘treat’, many research agencies now have a combination of healthy and indulgent food & drink freely available in the agency fridge and cupboard. Barista-quality coffee and chocolate bars are now perceived as a ‘must have’ as part and parcel of an attractive, comfortable research agency environment and culture. In an era when coming into the office is competing with your own home & kitchen, then this is now a hygiene factor. One agency lead commented “*at the last count we have 12 different types of milk in the fridge*”. Another remarked “*it’s a good sign if people are complaining that we have run out of Orange KitKats again. It means everything else in the business is OK!*”

Consider

Free breakfast, 13 types of milk, Orange KitKats, fruit

Team Need

It’s got to be as good as my kitchen at home

Final thought

As part of a thorough review of best practice, we have highlighted 12 areas above. It is important to acknowledge that not all will be appropriate for every research agency. Not every research agency will have the resources (staff, time, money) to implement them. Every business today is balancing the needs of its people with the economic environment it finds itself in.

The aim of this paper has been to inspire, and provide options for research agencies grappling with the universal question – how do I retain my team positively in a post-COVID age?

Every team is different. Sector, location, strategy, business model are all significant drivers of the whether an initiative will help or will not. Beyond these factors, every person is different. Part of the joy of a research agency is the collection of individuals creating a unique culture as a group.

The starting point therefore has to be listening – what does your specific team really need? What is a nice cherry on top of the cake, and what is the actual cake? If leaders start here, by truly listening, the above areas can be deployed in a targeted way and generate true positive retention.

A note on the authors

Richard Heath, Managing Director, Blue Yonder Research

Experienced leader of agency side insight teams, in both PLC and independent agencies. Richard is currently responsible for the 50 strong team at Blue Yonder – a leading R&D specialized insight business. Based in Leeds, the team deploys a national fully flexible and hybrid approach to work.

Louise McLaren, Managing Director UK, Lovebrands

Louise works across brand strategy, insight and innovation projects in diverse sectors. Lovebrands is headquartered in Paris and Louise joined to set up the UK business. Lovebrands operates a fully flexible model, with a mix of home- and office-working according to staff needs and preferences.

John Robson, Independent Advisor

John was co-founder of Sparkler, a digital insight and brand strategy consultancy acquired by global consultancy PA Consulting in 2018, where John became a Partner and led the expansion of the insight business from London into New York. John is an expert in consumer insight and brand strategy and now works as an independent advisor with scale-up businesses.