

Employee Retention Scorecard

A practical review for owners and HR leaders

Use this scorecard to identify where communication, access, benefits, and employee support may be weakening retention.

How to score

Rate each statement from 0 to 2. Use 0 for No or unknown, 1 for partly or inconsistently, and 2 for Yes and documented. This is a conversation tool, not a guarantee that any program will improve retention or satisfy legal requirements.

Organization	
Reviewer	
Number of employees	
Review date	

People Understanding the workforce

Review statement	0	1	2
We can describe why employees join, stay, and leave.	☐	☐	☐
We review turnover, absenteeism, vacancies, and employee feedback regularly.	☐	☐	☐
Managers know how to recognize concerns and route employees to appropriate help.	☐	☐	☐

Income Financial security and time away

Review statement	0	1	2
Employees understand available health, disability, life, retirement, and voluntary benefits.	☐	☐	☐
Our time-off, leave, and return-to-work processes are clearly communicated.	☐	☐	☐
Employees know where to find help when an illness, injury, or family event affects income.	☐	☐	☐

Legal Workplace guidance and access

Review statement	0	1	2
Policies, job expectations, complaint channels, and documentation practices are current.	☐	☐	☐
Supervisors receive practical training on consistent workplace decisions.	☐	☐	☐
Employees have clear access to legal or identity-support resources when offered.	☐	☐	☐

Digital Access privacy and communication

Review statement	0	1	2
Enrollment, benefit education, and employee communications work well on mobile devices.	☐	☐	☐
Employee data access is limited appropriately and sensitive information is protected.	☐	☐	☐
We can communicate quickly during closures, cyber events, or other disruptions.	☐	☐	☐

Liability Risk management and employee experience

Review statement	0	1	2
Workers compensation, safety, return-to-work, and incident reporting are coordinated.	☐	☐	☐
Employment practices risk has been reviewed with qualified insurance and legal professionals.	☐	☐	☐
Vendors and benefit partners have clear ownership, response standards, and escalation paths.	☐	☐	☐

Legacy Continuity leadership and growth

Review statement	0	1	2
Key roles have documented responsibilities and backup coverage.	☐	☐	☐
We have a plan for leadership transitions, key-person loss, and institutional knowledge.	☐	☐	☐
Our employee value proposition supports the workforce we expect to need over the next two years.	☐	☐	☐

Score each row 0, 1, or 2 in the margin. Total score: _____ out of 36

Your next step

Priority areas: _____

- Select the three lowest-scoring statements that most affect employees or operations.
- Assign an owner and due date for gathering facts—not immediately buying a product.
- Schedule an Employee Retention Risk Assessment to evaluate practical options and responsibilities.

START YOUR FREE RISK ASSESSMENT

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