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## How Coaching Helps a 'Big Four' Accounting Firm Retain Staff

Jan. 3, 2006 (HR Focus) — Sometimes retention may not be about keeping employees in a specific job -- or even a specific department. Instead, it may be about keeping them working somewhere else in your organization.

A three-year-old program at Deloitte aims to do just that -- help dissatisfied staff to figure out interests and skills that might be a better fit somewhere else in the organization. The program features a Web site with a range of self-assessment tools combined with one-on-one coaching. Retaining staff via the program has already saved the firm more than an estimated \$80 million in staff replacement costs alone.

### Know thyself

"We need to get to what people really value and help them to get there," explained Carly Coleman Goldsmith, career consultant with Deloitte. She described the Deloitte Career Connections (DCC) program and its achievements at the Northeast Human Resources Association (NEHRA) annual convention in Providence, Rhode Island.

This philosophy involves using a three-part talent management approach:

- **Develop:** Provide real-life learning that employees need to master a job and experiences that stretch their capabilities. "People want to do this -- they just don't know how," Coleman Goldsmith noted.
- **Deploy:** Work with individuals to identify their deep-rooted skills, interests, and knowledge, and help them find their best fit within the organization.
- **Connect:** Help individuals connect to the people that will help them to achieve their objectives. While this is beneficial to individual staff, it is also good for the Big Four firm, which is struggling with retention as are all professional services firms.

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"We're trying to have a very transparent internal mobility," she said, noting that this can be a difficult issue at the management level because individual managers and partners don't want to see staff parted from their own teams.

## **Confidentiality is key**

Giving staff the freedom to explore various options is a central focus of DCC, Coleman Goldsmith explained. Although this can create challenges at times for the 14 coaches in the program, who are located in Deloitte's geographic regions around the U.S., it is necessary for staff to be able to make the best use of the program's tools.

These include an online **Myers Briggs personality test, Strong Interest**-type tool, and a values-based exercise to help staff consider strengths and interests that may fit with their personalities. The Web site also includes online job openings within Deloitte, internal résumé writing tools, career research, advice on developing a career plan, a 360-degree feedback tool, and internal competencies for different departments and jobs that were developed by the firm's learning group.

Some DCC users simply access the Web tools alone; others use a coach's help in combination with the tools. Coaches can help staff to focus their findings from the outcome of the Web tests and tools in areas such as career planning and goal setting, relationship management, transfers or relocation, flexible work, performance issues, and career transitions.

## **Building buy-in**

DCC is part of Deloitte's HR program, Coleman Goldsmith said, but it is separate from initiatives such as the firm's performance management program or the mentoring program. She emphasized that DCC is only a coaching program. "We don't give advice. It's more about getting people to think for themselves. We try to align with the managing partners of each business line and the senior HR managers. Getting buy-in is key."

As is often the case with HR initiatives, "it is an uphill battle every day" to get the managers to participate and support DCC, although the coaches have communicated via workshops and other initiatives to educate managers about the importance of retaining staff -- even if they end up working for someone else.

Even the firm's HR generalists had objections at first, because "they thought we were stealing the cool part of their jobs!" Instead, Coleman Goldsmith said, "We portray ourselves as a partner [to HR] -- we're just another resource."

## **Lessons learned**

The accounting firm has helped to improve career paths and retain staff because of the DCC program. Coleman Goldsmith said that over 28,600 U.S. employees have accessed the DCC Web site so far, and more than 2,700 have received one-on-one coaching. An additional 1,260 have received "team" coaching.

DCC estimates that the firm has saved about \$83.4 million, calculated with a turnover cost of twice the average annual salary of \$76,000.

Coleman Goldsmith shared the following lessons that the DCC team learned as the program was developed, including:

- Clearly define the scope of service. Know when to call for assistance or make referrals. She said it helps to write down the various responsibilities of coach, mentor, HR department, and manager.
- Remain independent and don't breach confidentiality, unless a legal issue arises.
- Build a strong team to support each other and leverage knowledge.

### **How coaching 'saved' two employees for Deloitte**

Given the choice between losing a good employee and having him or her move to another job or department within the company, most organizations would choose the latter. Deloitte Career Connections (DCC) has made more of the second option available to employees through its coaching initiatives.

Two employees who have benefited from the program shared their stories during a presentation about DCC at the Northeast Human Resources Association annual convention in Providence, Rhode Island.

*Change of scene.* Susan Jones, manager, northeast operations, was a long-time Deloitte employee working in a New York City-area operations division that underwent an organizational transition. The result was a work situation that Jones was not happy with, although she liked the company and wanted to stay with it. She wasn't clear on what her options could be, especially since she had moved up through Deloitte without having to prepare a résumé; she needed help defining goals and with the basics of résumé preparation. Jones used some of the tests on the DCC Web site and then contacted one of the coaches.

"It helped open my mind and consider what I wanted to do with my career," Jones said. "It reassured me about my skills and abilities," she added, noting that she had been afraid that she could not do "anything" else. "They gave me homework and questions to answer."

During the process, Jones learned that a colleague in Boston had left the company. Taking the position would be a lateral move, and would mean leaving the New York City area where she had lived all of her life. Despite this, she realized through her "self study" in the coaching assignments that "it wasn't about climbing the corporate ladder for me." Instead, she wanted interesting and challenging work, and she also realized that she was ready to leave New York. Jones took the Boston job a year ago and is happy with her decision.

*A new focus.* A more dramatic career shift took place after coaching for Lisa Tansel Beier, now a campus recruiter for Deloitte. She began her career as a tax accountant, but had grown dissatisfied with the work when she reached the senior level (at accounting firms, this is a mid-level staff position). Tansel Beier used the DCC Web site to begin exploring what she liked and didn't like about her work. She discovered that she enjoyed training, mentoring, development, and campus recruiting. Unfortunately, there were few opportunities to move into those areas in her Indianapolis office.

Adding to her need to make a change was the fact that her then-fiance was planning to attend law school and the decision about where he would go to school was going to affect any job change that she might

consider. She got in touch with her area's DCC coach to see how to best tackle her employment situation.

Once Tansel Beier's fiancé chose Boston as the city where he would attend school, she was able to focus on potential opportunities in that area. Since it seemed that HR would be the best career path, she began exploring options. Her coach arranged contacts for her to have information interviews about various HR careers. She first made a transfer to the Boston area to continue working as a tax accountant until a suitable HR opening became available. During the waiting period, the coach helped her to enjoy the HR aspects of her position. The coach also encouraged her to attend as many campus recruiting events as possible to make her more visible. After nine months, an opportunity came up to work as a campus recruiter.

For Tansel Beier, the initial position was a step back in the hierarchy, but it was the beginning of a new career with the same company. "I love my job," she said, and credited DCC with helping her to achieve clarity about the best way to use her skills for a satisfying career-without having to change employers.

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