

HR17 · STEP 4 · FINAL

Engagement Survey Insights & Actions

Engagement Risk Flags

Final risk flag list with urgency, affected scope, evidence sources, recommended response, and downstream escalation trigger.

ABOUT THIS DOCUMENT

This is a **sample** deliverable from the **Engagement Survey Insights & Actions** workflow (HR17) in AGASI AiOS. It shows the expected structure and tone. All names, numbers, and facts are **fictional**.

Engagement Risk Flags

Compiled by: HR Analyst, People & Culture - Northbridge Advisory Partners Date: Current planning cycle Scope: Derived from the current engagement survey results, HR11 Exit Theme Summary, and sector benchmark data Downstream use: This document feeds into HR09 - Employee Relations Case Summary & Risks

Risk Flag Summary

#	Risk Flag	Urgency	Affected Scope	Evidence Sources	Recommended Response
1	Compensation competitiveness gap in Data & AI Advisory	Critical	Data & AI Advisory (112 staff)	Survey compensation score 49% (firm avg 58%); exit theme #1 - departing Senior Consultant cited 22% market gap; firm-wide benchmark gap 14% vs sector median 6%	Conduct targeted market benchmarking and present adjustment recommendations to the HR Director within 2 weeks
2	Absent career progression framework driving attrition	Critical	Data & AI Advisory, Risk & Compliance Advisory, HR Systems	Survey career development scores 51%, 48%, 42% respectively; exit themes #2 and #12 - two of three departures cited unclear progression; sector benchmark 65% vs firm 55%	Draft and publish career progression criteria for affected teams within 30 days
3	HR Systems under-resourcing creating operational failure risk	Critical	HR Systems (23 staff, currently operating at ~67% capacity)	Survey workload score 44% (lowest firm-wide, -20 vs avg); exit theme #6 - departing HRIS Analyst confirmed two analysts doing three-analyst workload; HRIS data quality issues compounding	Approve backfill for HRIS Analyst role and assess whether third analyst is needed; escalate to HR Director
4	Post-acquisition cultural fragmentation weakening engagement	High	Cross-practice (estimated 140 Meridian-origin employees plus legacy teams)	Survey culture & belonging: Risk & Compliance 56%, Data & AI 65%; exit theme #5 - two of three departures cited fragmentation; sector benchmark for post-M&A firms shows 4-7 pt depression typical	Establish cross-practice integration working group; benchmark notes post-M&A recovery takes 18-30 months of active effort
5	Management effectiveness deficit in Risk & Compliance Advisory	High	Risk & Compliance Advisory (80 staff)	Survey management effectiveness score 58% (firm avg 72%, -14 pts); exit theme #8 - departing Associate Consultant cited absent manager and no check-in cadence	Raise management feedback with the Practice Head through the HR Director; recommend minimum fortnightly check-in cadence for new hires
6	Onboarding quality failure contributing to early-tenure attrition	High	Risk & Compliance Advisory (confirmed), potentially firm-wide	Exit theme #4 - departing Associate Consultant (8-month tenure) described onboarding as "chaotic" with no structured plan; firm-wide 30-day onboarding completion 63% vs sector benchmark 84%	Audit all practices against standard onboarding checklist; investigate Risk & Compliance gap; report to HR Director
7	Unreliable engagement data for Digital & Technology practice	Medium	Digital & Technology (78 staff)	Survey response rate 38% (firm target 75%+); all dimension scores below firm average but sample size too small for reliable conclusions; team mid-restructure	Re-survey Digital & Technology in the next survey wave after restructure completes; do not base decisions on current data

Detailed Risk Narratives

Flag 1: Compensation Competitiveness Gap - Data & AI Advisory

- **Evidence:** The Data & AI Advisory practice scored 49% on Compensation & Benefits, the lowest of any team and 9 points below the firm average of 58%. The firm-wide score of 58% already sits 10 points below the sector benchmark median of 68%. The HR11 Exit Theme Summary documents a Senior Consultant in Data & AI who resigned after receiving a 22% higher offer from a competitor, having raised the compensation concern with the Practice Head six months earlier without resolution. A survey free-text comment from the same practice states: "My total compensation has barely moved in three years. The annual increase last cycle was 3%." The firm-wide compensation benchmark gap is 14% against a 5% target; the sector median gap is 6%.
- **Current Trajectory:** Declining. The firm-wide compensation score dropped 4 points year-on-year. Data & AI is likely worse given the confirmed departure.
- **Recommended Owner:** Compensation Analyst, Total Rewards - with HR Director approval.
- **Escalation Trigger:** A second compensation-related resignation from Data & AI Advisory within 60 days, or a compensation score below 45% in any practice in the follow-on re-survey.

Flag 2: Career Progression Framework Gap

- **Evidence:** Three teams score well below the firm average on Career Development: HR Systems (42%), Risk & Compliance Advisory (48%), and Data & AI Advisory (51%). The firm-wide score of 55% is 10 points below the sector benchmark of 65%. Career Development is the strongest single predictor of engagement in the benchmark regression analysis (beta 0.31). The HR11 Exit Theme Summary records that two of three departing employees cited unclear career progression - the Senior Consultant referenced no published criteria, and the HRIS Analyst cited limited career progression opportunities with no internal mobility structure. Free-text comments include: "There is no published career progression framework" and "Career development here means waiting for someone above you to leave."
- **Current Trajectory:** Declining. The firm-wide Career Development score dropped 6 points year-on-year, the largest single-dimension decline.
- **Recommended Owner:** L&D Manager, People Development - with input from Practice Heads.
- **Escalation Trigger:** Career Development dimension score drops below 50% firm-wide, or a third resignation in 90 days where career progression is cited as a contributing factor.

Flag 3: HR Systems Under-Resourcing

- **Evidence:** HR Systems scored 44% on Workload & Resources, 20 points below the firm average and the lowest score on any dimension for any team. The team also scored 42% on Career Development and 45% on Learning & Growth, indicating compounding disengagement. The HR11 exit confirmed the departing HRIS Analyst's account: "running at two analysts for a three-analyst workload since the managed-services contract started." The team is simultaneously managing a dual-platform HRIS migration with approximately 40 legacy records with grade-mapping conflicts from the Meridian acquisition. With the HRIS Analyst's departure, the team drops to two analysts facing a growing backlog.
- **Current Trajectory:** Declining. The HRIS Analyst departure on the current offboarding schedule will reduce the team further. HRIS data quality issues (exit theme #7) will worsen without additional capacity.
- **Recommended Owner:** HRIS Administrator, HR Systems - business case to HR Director.
- **Escalation Trigger:** Second resignation from HR Systems, or HRIS migration milestone missed due to staffing.

Flag 4: Post-Acquisition Cultural Fragmentation

- **Evidence:** Culture & Belonging scores are weakest in Risk & Compliance Advisory (56%) and Data & AI Advisory (65%), both practices with significant Meridian-acquisition integration exposure. The firm-wide score of 69% sits 2 points below the sector benchmark of 71%, but the benchmark report notes that post-M&A firms typically experience a 4-7 point depression - placing Northbridge within the expected post-M&A range. Exit theme #5 was cited by two of three departures, with references to "Meridian people do things one way, legacy Northbridge another" and the HRIS Analyst citing unfinished system migration. Free-text comments confirm: "everything feels fragmented" and "no sense of team."
- **Current Trajectory:** Stable but not improving. The +2 pt year-on-year improvement in Culture & Belonging is positive but insufficient to close the gap. The benchmark notes recovery requires 18-30 months of active integration effort; the Meridian acquisition completed in the recent prior period.
- **Recommended Owner:** HR Director, People & Culture.
- **Escalation Trigger:** Culture & Belonging score drops below 55% in any practice, or cross-practice project friction is raised in employee relations casework.

Flag 5: Management Effectiveness - Risk & Compliance Advisory

- **Evidence:** Risk & Compliance Advisory scored 58% on Management Effectiveness, 14 points below the firm average of 72% and 16 points below the sector benchmark of 74%. This is the largest negative variance on any dimension for any team apart from HR Systems Workload. The HR11 exit records the departing Associate Consultant citing that the Practice Head was "hard to reach" and "often travelling" with "no regular check-in cadence." A survey comment states: "Manager availability is a real issue. Check-ins are cancelled more often than they happen."
- **Current Trajectory:** Stable (no year-on-year comparison available at team level for this dimension due to team restructuring in a prior period).
- **Recommended Owner:** HR Director, People & Culture - to engage with the Practice Head, Risk & Compliance Advisory.
- **Escalation Trigger:** A formal employee relations complaint related to management absence, or Management Effectiveness score below 55% in the follow-on re-survey.

Flag 6: Onboarding Quality Failure

- **Evidence:** The firm-wide 30-day onboarding completion rate is 63% against a target of 92% and a sector benchmark of 84%. The HR11 exit records the departing Associate Consultant (8-month tenure, Risk & Compliance Advisory) describing onboarding as "chaotic" with "no structured onboarding plan, no buddy, no 30-60-90 plan." The Associate noted "other new hires in the practice had a similar experience." This aligns with the firm's first-year attrition risk: the sector benchmark for first-year voluntary turnover is 22%, and Northbridge's overall voluntary turnover of 16% likely masks a higher early-tenure rate.
- **Current Trajectory:** Not improving. The onboarding completion rate has been below target for at least two survey cycles.
- **Recommended Owner:** Employee Relations Specialist, People Operations.
- **Escalation Trigger:** A second early-tenure resignation (< 12 months) from Risk & Compliance Advisory, or onboarding completion rate below 60% in any practice.

Signals Not Escalated

Signal	Reason for Exclusion
Communication score above benchmark (75% vs 69%)	Positive signal; however, free-text comments suggest the high score reflects Town Hall communications rather than operational communication. Monitor for divergence in the follow-on survey wave.
Digital & Technology low scores across all dimensions	Response rate too low (38%) for reliable conclusions. Flagged as Medium urgency for re-survey rather than action.
Strong direct team relationships (exit theme #10, survey culture scores in People & Culture 81%, HR Systems 76%)	Positive retention factor. Note for preservation rather than intervention.

Downstream Handoff Note

This Engagement Risk Flags document is formatted for consumption by HR09 (Employee Relations Case Summary & Risks). The Employee Relations Specialist should treat Critical and High flags as potential inputs to case monitoring and pattern analysis. Flag #1 (compensation gap) and Flag #5 (management effectiveness) have the highest likelihood of generating formal employee relations activity if left unaddressed.