

NEW Manufacturing Alliance
TALENT RISK MANAGEMENT - WEBEX MEETING MINUTES
Tuesday, April 27, 2021 - 8:30 to 9:30 AM

ATTENDEES: Scott Beyer-Green Bay Packaging, Pam De Leest-The HS Group/Career Momentum, Beth Kleinke-BPM, Inc., Chris Linn, Andrew Schmitz-proceed.app, Trisha Tetzlaff, Ann Franz-NEWMA, Debbie Thompson-NWTC

RECAP: RETIREMENT READINESS SEMINAR – 2/23 (HR SESSION), 4/17 & 20

DAY 1: Saturday, 4/17/2021 – 9:00 to 11:00 AM <ul style="list-style-type: none">▪ Opening Remarks (Chris Linn, Emcee)▪ Retirement Assessment Results (The H.S. Group)▪ Social Security (Social Security Administration)▪ Estate Planning (von Briesen & Roper, s.c.)	DAY 2: Tuesday, 4/20/2021 – 6:00 to 7:30 PM <ul style="list-style-type: none">▪ Medicare (R&R Insurance)▪ Purpose in Retirement (InitiativeOne)▪ 6 Ways to a Healthier You (Motion Connected)
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Overall, members felt the seminar was very well done. The event featured multiple presenters, with each presenting remotely via Zoom. A few companies, including Parker and BPM Inc., offered the event onsite for employees that may not be tech savvy. 63 people completed The H.S. Group’s assessment. 20 attendees completed the post-event survey. Results are summarized below.

- Post survey participant’s age:
 - Under 56 Years – 15%
 - 56 to 60 Years – 35%
 - 61 to 65 Years – 30%
 - Older Than 65 Years – 20%
- The vast majority of respondents attended both sessions.
- The overall average rating of the seminar was 4.3 out of 5.
- All of the presentations received great scores, especially Social Security and Medicare.
- How can future seminars be enhanced?
 - Offer more information on Medicare, financial readiness, wills, and trusts.
 - Discuss; long term care insurance, compare Medicare supplements, give examples of transition jobs, purchasing insurance off markets, and budgeting without a steady paycheck.
- 95% of the respondents would recommend the seminar to a coworker.

The survey comments were positive and are very useful. A number of attendees shared they now know what questions to ask and where to get the answers. Ann will let Alliance members know they can access the seminar recordings on NEWMA’s website.

Members agreed to move forward with hosting the Retirement Readiness Seminar in fall. An in-person format is preferred, as it offers better participation and understanding. Financial literacy, Social Security, Medicare, knowledge transfer, wills, and estates will be included in the fall session. Word of mouth should increase participation for the next session.

Tricia Tetzlaff’s organization offers a series called “Financial IQ” and would like to consider offering this as a fall topic. Based on the survey results, this topic could be tailored for the audience.

Chris shared the following ideas for the fall event.

- Circle back at the end of the session and touch on some key topics.
- Provide a recap on the assessment and SSA information.
- Have attendees write down their action steps before they leave.
- Discuss building a meaningful bridge with their employer that will not jeopardize their position before retiring.

Pam De Leest has coached and worked with thousands of people. She shared that the timing of retirement notification to the employer by the employee hinges on the culture of the organization. In some cultures, the minute a person notifies their employer of their impending retirement they are no longer in the loop of the

organization. Pam feels there needs to be a discussion with employers to take a look at their culture. They could consider helping their employees by offering them other options like part-time work after they retire. Leaders need to look at their internal culture. How are employees contemplating retirement rewarded?" This topic could be offered to HR and organization leaders.

RECAP: MARCH 2 MEMBERSHIP MEETING: SETH MATTISON PRESENTATION

Amazing feedback has been shared regarding Seth’s presentation. Organizers are looking to bring him back to present in October.

EMPLOYEE BENEFITS GUIDE

The Employee Benefits Guide, created by the Talent Risk Task Force, will be repackaged for companies.

KNOWLEDGE TRANSFER DISCUSSION WITH ANDREW SCHMITZ FROM PROCEED.APP

andrew@proceed.app, Phone 920-202-0813

Andrew discussed his company, proceed.app, that has built a software application for capturing knowledge transfer before employees leave an organization. Andrew has won several competitions for his concept idea.

The app is used to create standard SOPs using photos and videos. Knowledge is communicated amongst management and operators. The app has a 4 step process that creates a visual library that is easy to access and maintain. Videos can be made using a phone and uploaded to the system.

Proceed.App			
Grassroots Knowledge Management - Steps 1 through 4			
1	2	3	4
Identify Key Processes & People	Create Vision & Buildup Buy-In	Crowdsourcing & Collaboration	Track, Maintain, & Reward
<ul style="list-style-type: none"> ▪ Plan project scope. ▪ Interview key people. ▪ Identify key knowledge. 	<p><i>Most important step in the process.</i></p> <ul style="list-style-type: none"> ▪ Design library layout. ▪ Create project roadmap. ▪ Design the end goal. ▪ Determine who is the best person to document knowledge. 	<ul style="list-style-type: none"> ▪ Create content based on the roadmap. ▪ Submission Approval Process ▪ Software provides structure of management approval. ▪ Content is captured based on the roadmap. 	<ul style="list-style-type: none"> ▪ Track progress. ▪ Maintain / set reminders. ▪ Reward key contributors. ▪ This is an ongoing phase.

Workflows are created. Employees can capture visuals of each step. Videos can be recorded directly to the app. After creating the workflow, it can be submitted so colleagues can be invited to view the workflow and comment/approve it.

One of the major things the proceed.app has been able to do is help companies navigate workforce language barriers. Employees may not want to share that they have difficulty understanding oral or written communication.

2021 TALENT RISK TASK FORCE FOCUS AREAS

- Employee Retention: Benefits Focused Strategy
- Retirement Readiness Seminar
- Women in Manufacturing Retention
- Mentorship
- Knowledge Transfer

UPCOMING ALLIANCE EVENTS

April 28 – Talent Attraction Webex Workshop

May 4 – Excellence in Manufacturing/K-12 Partnerships Awards, at Stone Prairie

May 21 – Mentorship Webex Workshop

June 30 – NEWMA's 15 Year Anniversary Celebration – Miller Lite Deck, at Lambeau Field

NEXT MEETING DATE/TIME/AGENDA

The next Talent RISK Task Force Webex meeting will be on Tuesday, May 18, 2021, 8:30 to 9:30 a.m. Agenda:

- ✓ Fall Retirement Readiness Seminar
- ✓ HR Event with a Focus on Knowledge Transfer
- ✓ Upcoming Alliance Events
- ✓ Next Meeting Date/Time/Agenda