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Testing the Unfolding Theory of Turnover: Development of an Exit Survey

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TESTING THE UNFOLDING THEORY OF TURNOVER:

DEVELOPMENT OF AN EXIT SURVEY

A Thesis

Presented to

The Faculty of the Department of Psychology

San José State University

In Partial Fulfillment

of the Requirements for the Degree

Masters of Science

by

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DEVELOPMENT OF AN EXIT SURVEY

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ABSTRACT

TESTING THE UNFOLDING THEORY OF TURNOVER:

DEVELOPMENT OF AN EXIT SURVEY

by Rachael R. Tellez

Understanding turnover has always been a concern for organizations. The costs of turnover to an organization are both direct and indirect, through financial and personnel consequences. By understanding why employees leave, organizations can create more effective retention strategies in hopes of keeping top talent. One theory of turnover, The Unfolding Theory, proposes that employees follow one of five cognitive pathways when deciding to leave an organization. Previous studies evaluating this theory have both methodological and administrative flaws, such as conducting interviews after employees leave the organization. The present study examined the Unfolding Theory by creating an exit survey based on all the aspects of the theory and administering the survey to 107 employees before leaving an organization. The results indicated that the Unfolding Theory does well to capture the processes employees engage in when deciding to leave an organization. However, the data also suggested that additional cognitive pathways may exist and that different groups of employees may have a higher prevalence for a particular pathway. The study discusses how organizations can utilize the findings to gather exit data more accurately, which will help to better understand why employees leave an organization.

TABLE OF CONTENTS

LIST OF TABLES	vii
INTRODUCTION	1
Impact of Turnover	1
The Unfolding Theory of Turnover	2
Overview of the Unfolding Theory of Turnover	3
Empirical Support for the Unfolding Theory of Turnover	7
Methodology of Capturing Exit Data	11
Methods Used to Test the Unfolding Theory	13
METHOD	17
Participants	17
Measures	17
Shock.....	19
Script.....	20
Image Violation	20
History of Dissatisfaction	22
Job Alternative.....	22
Procedures	23
RESULTS	25
Descriptive Statistics	25
Overall Classification	27

Pathway Classification	28
Unclassified Employees	31
Additional Analyses	32
DISCUSSION.....	34
Overall Findings.....	34
Theoretical Implications	35
Practical Implications	36
Strengths	38
Limitations and Future Research	39
Conclusion	41
REFERENCES	43

LIST OF TABLES

TABLE 1. The Unfolding Theory Pathways	4
TABLE 2. Demographic Characteristics.....	18
TABLE 3. Descriptive Statistics of Survey Items	26
TABLE 4. Classification Rates	28
TABLE 5. Relationship Between Pathways and Demographic Variables.....	33

Introduction

Organizational turnover, defined as the rate at which employees leave an organization, is a major concern for organizations (Mitchell, Holtem, & Lee, 2001). Given its numerous costs, much research has been done to better understand the causes of employee turnover. More recent research, however, has attempted to understand the cognitive processes an employee goes through in making the decision to leave an organization. One theory, the Unfolding Theory of Turnover created by Lee and Mitchell (1991; 1994), proposes that an employee follows one of five cognitive pathways when deciding to leave an organization. However, previous research has not comprehensively tested this theory in that not all aspects of the theory were measured and the theory was retroactively applied after employees had left the organization. Also, previous research used methodologies that contributed to inaccuracies, specifically interviews, which can lead to interviewer bias and interpretation errors. Therefore, the purpose of this study was to test the Unfolding Theory thoroughly by utilizing a comprehensive exit survey that was given to employees before leaving the company.

The impact of turnover and the research on this topic will be discussed. Next the Unfolding Theory will be explained followed by a description of the empirical support that exists for the theory. Finally, the flaws of these empirical studies will be highlighted as well as how the current study addressed those flaws.

Impact of Turnover

According to the SHRM Human Capital Benchmarking Database, the average voluntary turnover rate in 2010 was 13%, showing the value of better understanding why

employees leave an organization (Jacobs, 2012). Although these rates may vary by industry, the costs associated with voluntary employee turnover for any organization are high and include more than just monetary implications.

The consequences of turnover include both direct and indirect costs to an organization. Direct costs include financial costs associated with an employee leaving, such as subsequent recruiting and training costs. The cost of replacing an employee, including separation, replacement, and subsequent training costs, has been estimated to be 1.5 to 2.5 times an employee's annual salary (Cascio, 2006). Turnover may also have indirect costs to an organization, such as losing the knowledge and skills of a worker as well as disrupting the established culture (Shaw, 2005). Each employee that leaves takes away some contribution to the larger group and, until the position is appropriately filled, the organization may lose some amount of productivity. The consequences of turnover impact the productive capacity of an organization, which inhibits both short- and long-term performance (Heavey, Holwerda, & Hausknecht, 2013). Therefore, organizations need to understand the process that employees encounter when deciding to leave in order to attempt to reduce the incidence of voluntary turnover.

The Unfolding Theory of Voluntary Turnover

Early theories attempting to understand the causes of turnover focused on two main variables: job satisfaction and organizational commitment (Mobley, 1977; Price & Mueller, 1981; Steers & Mowday, 1981). Researchers felt that the reason employees chose to leave an organization was because they were unhappy with their jobs or their organizations. Research on these predictors has yielded moderate but consistent support,

showing that job satisfaction and organizational commitment are negatively related to turnover.

Further research sought to add more complexity via adding more variables in hopes of finding stronger relationships with employee turnover. A meta-analysis conducted by Cotten and Tuttle (1986) again showed only moderate relationships between turnover and other categories of variables such as demographic variables, work-related variables, and outside environmental factors. Therefore, Lee and Mitchell (1991) decided to develop a theory of turnover that was a more comprehensive and realistic representation of what employees experience in making their decision to leave.

The Unfolding Theory of Turnover (Lee & Mitchell, 1991) was created using the Image Theory (Beach, 1990; Beach & Mitchell, 1990), which is a decision-making model that essentially asserts that decisions are based on the compatibility of possible alternatives and existing images of one's principles, goals, and action plans. It is interesting to note that image theory was not explicitly created to explain turnover, but it can be applied to any organizational situation, as well as everyday decisions.

Overview of the Unfolding Theory of Turnover. The Unfolding Theory of Turnover proposes that employees follow one of five cognitive pathways when making the decision whether to quit a certain job (Lee & Mitchell, 1991; 1994). A cognitive pathway refers to how employees interpret their work environment, identify options, and enact responses. The five different pathways are summarized in Table 1.

Table 1. The Unfolding Theory Pathways

Pathway	Shock	History of Dissatisfaction	Script	Image Violation	Alternative Job Opportunity	Examples
1	✓ Personal, positive, and expected		✓			The employee's spouse gets a job in Washington, DC; the employee has always wanted to live there, so he quits
2	✓ Negative organizational event			✓		The employee is bypassed for promotion and sees little opportunity for career advancement; she decides that she can no longer work for the company and quits
3	✓ Unexpected job offer			✓	✓	The employee gets an unexpected job offer from a local competitor; after comparing the new opportunity with his current situation, he decides to quit and pursue the new opportunity
4a		✓		✓		The employee realizes that she is unhappy and quits without looking for a new job
4b		✓		✓	✓	The employee realizes that he is unhappy; he initiates a job search and quits when he finds a more desirable alternative

Note: Table adapted from Kulik, Treuren, & Bordia (2012)

The first three pathways begin with some sort of “shock” event. Shock is defined as “a very distinguishable event that jars the employee toward deliberate judgments about their jobs and, perhaps, to voluntarily quit their job” (Lee & Mitchell, 1994, p. 60). The first pathway (Pathway 1) begins with a shock that is personal, positive, and expected, such as the opportunity to move to a new city (Holtem, Mitchell, Lee, & Inderrieden, 2005). This event invokes a pre-established script such that the decision to leave the organization requires little deliberation and is automatic (Holtem & Inderrieden, 2006). A pre-established script refers to action plans that identify appropriate responses. These responses can stem from learned responses and circumstances surrounding the shock (Lee & Mitchell, 1994). For example, if an employee has always wanted to live in California and his or her spouse gets a job opportunity there, there will be an immediate decision to quit. Therefore, when this shock occurs, the decision to leave is made quickly.

The second pathway (Pathway 2) begins with a shock that is a negative organizational event (Holtem et al., 2005; Mitchell & Lee, 2001), such as an unfair performance review or being bypassed for a promotion. This causes the employee to evaluate whether an image violation has occurred. Image violation is a set of images that invoke a reassessment of one’s attachment and commitment to an organization (Lee & Mitchell, 1991; 1994). Image violation consists of three components: value image, trajectory image, and strategic image. Value images are personal principles an individual has about any situation in life. Trajectory image refers to the personal career goals of an employee. Lastly, strategic image is the goal-oriented plan to achieve those career goals.

For example, employees may feel a value image violation if they are treated disrespectfully by their managers. Another example would be if employees had career aspirations to become directors, and they had discussed a career path with their managers to get there, they might feel a trajectory and strategic violation if they never actually get the promotion. If an employee feels a situation is not aligned with any of these three image violation components, it will cause further deliberation about the possible job options and what serves as the best fit with his or her value, trajectory, and strategic images. Pathway 2 leads to a “push decision,” such that the image violation forces employees to evaluate the job and the extent to which they still fit with the organization. The decision to leave is usually made without a job alternative in mind. The definition of job alternative includes any other opportunity that the employee chooses over the current job, such as returning to school or becoming a stay-at-home parent (Lee, Mitchell, Wise, & Fireman, 1996).

The third pathway (Pathway 3) begins with a shock that can be positive, neutral, or negative and is usually an unexpected job offer (Lee & Mitchell, 1994; Mitchell & Lee, 2001). The employee must then decide if an image violation has occurred and whether he or she will fit better with a new organization, based on the employee’s values, trajectory, and strategy. This pathway results in a “pull decision,” such that the employee must now compare the current job with an alternative. This pathway differs from the first two in that it is made with a job alternative in mind.

The final two pathways do not begin with a shock but instead are characterized by a consistent feeling of job dissatisfaction. Both pathways begin the same, with mounting

dissatisfaction, which then leads to an image violation. Once the image violation has occurred, employees in Pathway 4a decide to leave without a job alternative. Those in Pathway 4b go through the same process but will have a job alternative when the decision to leave is made.

Empirical Support for the Unfolding Theory of Turnover. Several studies have been conducted to determine the extent to which the Unfolding Theory accurately portrays the different pathways employees take to turnover. The first study, conducted by Lee, Mitchell, Wise, and Fireman (1996), tested the theory in a sample of 44 nurses. The authors conducted semi-structured exit interviews with the nurses and sent follow-up surveys to assess the reliability and validity of the information gathered in the interviews. All interviews were given after the employee had left the organization. The researchers classified employees into the pathway that he or she followed based primarily on the interview information, with the survey responses being supplemental. The more employees that were able to be classified, the more accurate the theory was in capturing the process employees followed in deciding to leave.

The results of this study (Lee et al., 1996) supported the theory with all of the participants being classified into one of the five pathways. The most prevalent pathways were Pathway 3 (shock, image violation, and job alternative) at a 32% classification rate and Pathway 4b (history of dissatisfaction, image violation, and job alternative) at 23%. Those least prevalent were Pathway 1 and 2 (14%).

The Lee et al. (1996) study was the first to show support for the Unfolding Theory of Turnover due to its ability to capture the process of employee turnover. However,

both the interview and the survey only explicitly measured four of the five components: shock, script, image violation, and job alternative. No interview or survey question addressed the job dissatisfaction aspect, which shows a lack of comprehensiveness in the measures. The researchers relied heavily on the absence of a shock to categorize employees into Pathway 4a and 4b. The data for this study were also collected retroactively after the employees had left the organization. This may have led to memory errors and failure to capture the turnover process as it is happening, which is the intention of the Unfolding Theory.

A few years later, Lee, Mitchell, Holtom, McDaniel, and Hill (1999) conducted a replication and extension of the previous study using 229 accountants. In this study, surveys were mailed to employees who had left the company in the previous three to five years. This study is different from the first study conducted by these researchers in that the methodology used only surveys, rather than interviews. This was done in order to use “a far more quantitative method” (Lee et al., 1999, p. 455). The survey measured each component of the theory, with 29 open- and closed-ended items.

Ultimately, the researchers (Lee et al., 1999) were able to classify 93% of the participants into one of the five pathways, showing further support for the theory. This study was similar to the first in that Pathway 3 was most prevalent (59%) and Pathway 1 and 2 were the least (3%). However, similar to this previous study, the surveys were sent to employees up to five years after deciding to leave the organization. This again may have led to memory errors and an incomprehensive testing of the Unfolding Theory.

Based on a review of these two empirical studies, Mitchell and Lee (2001) concluded that the theory is empirically sound and internally consistent. There was also an interesting difference between these two studies, in that nurses were more likely to leave via pathways 1, 2, and 4a than were accountants. All three of these pathways describe employees who leave without a job alternative. Conversely, accountants were found to leave more via Pathway 3, which does involve a job alternative (Harmen, Lee, Mitchell, Felps, & Owens, 2007). As this suggests that different occupations may be inclined to leave via different pathways, organizations must be aware of such occupational differences when tailoring effective retention strategies.

Recent research has continued to support the Unfolding Theory. In 2006, Donnelly and Quirin tested this theory with a sample of 84 accountants who had quit in the past year. The methodology of this study was similar to that used by Lee et al. (1996), by conducting live interviews and sending out follow-up surveys.

The results showed that 91% of the participants could be classified into one of the five pathways (Donnelly & Quirin, 2006). The pathway with the highest categorization rate was Pathway 4a (33%) and the pathway with the lowest was Pathway 1 and 4b (7%). One limitation of this study was that both the interview and the survey only measured four of the five components: shock, script, image violation, and job alternative. None of the interview or survey questions explored the level of dissatisfaction an employee felt, but instead relied on the absence of a shock to infer a history of dissatisfaction was present. This may have led to participants being categorized as having a history of dissatisfaction when in fact they may not, which ultimately increased the overall

classification rate. It could be the case where some employees do not have a history of dissatisfaction nor experience a shock event, but still decide to leave the organization.

The first study showing only limited support for the theory tested the generalizability of the theory in a different country (Morrell, Loan-Clarke, Arnold, & Wilkinson, 2008). This study used a population of 352 nurses in the UK who had left in the previous year. Participants were mailed a survey that assessed all aspects of the theory: shock, script, image violation, history of dissatisfaction, and job alternatives. This survey consisted of 40 questions, which is longer than previous studies that were mostly closed-ended and utilized a 5-point Likert scale response format. One open-ended question was used for elaboration on the shock event.

The results showed a lower classification rate than previous studies at 77% (Morrell et al., 2008). Similar to the first two studies, the most prevalent pathway was Pathway 4b (43%) and Pathway 3 (33%). No employees were classified into Pathway 2 or 4a. These results give limited support for the theory and may show a limitation in the ability to apply this theory outside the U.S., which should be explored in future research. This study also had a methodological limitation by retroactively collecting exit data up to a year after employees left the organization.

Most recently, Kulik, Treuren, and Bordia (2012) evaluated the Unfolding Theory using exit interviews conducted by ConsumerCorp, an Australian organization involved in the marketing and sales of consumer products. The researchers used transcripts from previously conducted exit interviews of 228 employees who voluntarily left the company. To classify employees, the researchers relied on a directed content analysis. This is a

two-step process that involves both deductive and inductive analyses. Coders first read the text and searched for “passages that represent elements of the theoretical framework” (Kulik et al., 2012, p. 31). From these passages, the researchers were able to categorize employees based on the various aspects of the Unfolding Theory.

The results showed that all the cases were classified into one of the five pathways (Kulik et al., 2012), with the most prevalent being Pathway 3 (31%) and the least Pathway 4a (7%). A major limitation of this study was that, since these interviews were conducted prior to the study, the researchers were not able to ensure each aspect of the theory was accurately captured, but instead had to rely on the interview transcripts that were previously gathered by the organization. Therefore, the researchers had to infer the presence or absence of each aspect of the Unfolding Theory used to classify employees into pathways.

Overall, studies that have tested the Unfolding Theory of Turnover have gathered mixed results with classification rates ranging from 77% to 100%. This raises some issues in terms of how comprehensively the theory has been tested and the methodological flaws of previous research. The next section will discuss some of these flaws, their influence on the results of several studies, and how the current study will address them.

Methodology of Capturing Exit Data

The methods used by organizations to gather information from exiting employees typically consist of “a questionnaire, interview, or discussion conducted during one of the last working days between a representative of an organization and a person whose

employment with that organization has ended” (Giacalone & Knouse, 1993, p. 240). The most popular method used by organizations is an in-person interview (Eldridge, 2008; Wilkinson, 2005). Exit interviews have been traditionally used to collect exit information with the assumption that more in-depth information can be obtained than with surveys. However, research has shown that there are many problems with conducting exit interviews, such as the tendency for employees to downplay the negative organizational factors that lead them to leave for fear of future repercussions (Wilkinson, 2005). Without accurate information, organization cannot know what is truly causing their employees to leave and how to fix it. There are also many flaws in the interview process, such as interview bias, interpretation errors, and lack of consistency (Staples, 1991).

One way to address problems associated with exit interviews is to use a self-report survey. These surveys contain mostly closed-ended questions, with a few open-ended questions for elaboration. These closed-ended questions are multiple choice and dichotomous when possible. For example, when asking about the occurrence of a shock event, the answer choices can simply be a “yes” or “no” response format.

Surveys resolve many methodological problems related to the use of interviews. Surveys are a good way to capture objective information in the form of numerical responses, thus making statistical analyses easier (Giacalone, Stuckey, & Beard, 1996). Morrell and Arnold (2007) also note that adding open-ended items to surveys allow employees the opportunity to explain their decision to exit the organization. Further, surveys can be administered more efficiently to more than one individual at a time (Giacalone, Knouse, & Montagliani, 1997).

Methods Used to Test the Unfolding Theory. The studies testing the Unfolding Theory have used mixed methods and produced mixed results. One study used only interview data that had been collected prior to the study by the organization itself (Kulik, Treuren, & Bordia, 2012). Two studies used interview data supplemented by survey information (Donnelly & Quirin, 2006; Lee, Mitchell, Wise, & Fireman, 1996). However, in both of these studies, not all participants returned the survey, which meant some interviews could not be cross-validated with survey information. Along with the lack of comprehensiveness in not measuring all aspects of the theory, as pointed out above, the results of these studies were subject to the interpretation of the researchers, leading to lower reliability. Two studies used a mailed survey sent by the researchers after the employee had left the organization (Lee et al., 1999; Morrell et al., 2008). Although this survey method does overcome interview issues, there are problems with the survey format. The response format for these surveys was either open-ended or a 5-point Likert scale. These response formats lead to the same issues as interviews by relying on the subjectivity of the researchers to transfer or code the responses into categories that characterize the theory.

With regard to the classification rates of the studies reviewed earlier, those that used interview data, either by itself or in combination with surveys, had higher classification rates than studies that solely used a survey. This suggests that interviews allow for subjective classifications, which may inflate the classification rate. Interviews may also limit the ability to address all the aspects of the theory, especially if the exit information has been previously collected by the company. Those investigations using

surveys showed lower classification rates, but may be a more accurate reflection of the theory given a more objective measure was in place to classify employees. Therefore, this study will utilize a survey method that comprehensively addresses all aspects of the Unfolding Theory. The survey will also rely on closed-ended questions in order to minimize any subjectivity and increase reliability.

In addition to issues with how the previous studies collected information, all of these studies also had issues with the timing of when the information was collected. Each study applied the theory retroactively, once the employee had left the organization. For example, Lee et al. (1999) used participants who had left the organization between three and five years prior to the survey. This type of method could limit the ability to accurately capture the reasons an employee chose to leave. By not capturing the information while the employee is in the process of exiting an organization, the theory cannot be fully validated to capture the thought process at the time of departure. The current study addresses this issue by measuring the aspects of the theory before employees actually leave the organization.

Organizational turnover is a constant concern that organizations seek to address. Understanding why employees choose to leave and what can be done to prevent turnover are heavily studied topics in organizational behavior. The current study aims to evaluate the ability of the Unfolding Theory to capture the process of voluntary turnover accurately through the use of an exit survey. This theory has received some support in the last 20 years, and this study seeks to expand that support further by testing the practical use of this theory as a basis for development of an exit survey. By using this

theory as the basis for creating an instrument that measures reasons for turnover, this study can more comprehensively assess the value of this theory in understanding the relevant cognitive processes that employees utilize when deciding to leave a company. The previous studies have all retroactively measured the theory's aspects after employees have left an organization, therefore this study will be the first to proactively measure this theory through the use of an exit survey. This may help organizations understand the importance of using this theory to create instruments that will gather the most accurate exit data.

By applying the Unfolding Theory of Turnover to an organization's exit data, more effective retention strategies may be developed and implemented by Human Resource departments, as well as managers. When using this theory, organizations will be able to categorize employees into one of five cognitive pathways, each involving different factors. For example, Pathway 1 involves a decision made without influence from the organization but simply a personal event. This is important for organizations to know so they can turn their efforts to recruiting and hiring a replacement quickly. For the other pathways, organizations will be able to notice trends about which are most prevalent and what changes can be made. For example, both Pathway 4a and 4b start with the accumulation of job dissatisfaction. If an organization notices these pathways are main reason for employee departures, then preventative steps can be taken to ensure employees are satisfied. This can include occasional one-on-one meetings with a manager to do a check-in or creating flexible work schedules for employees, which allows them to work remotely or non-traditional hours when needed. Organizations can

also create an annual survey to monitor employee satisfaction levels and address any concerns they may have.

Method

Participants

The sample for this study included 107 employees who voluntarily chose to leave a global IT organization that produces software products in the Silicon Valley.

Participants were chosen on the basis of a nonprobability sampling method, specifically through purposive sampling. The researcher identified participants from the workforce database of the organization. The only criteria for excluding participants was those who left due to involuntary reasons, as the purpose of this study is to understand only voluntary turnover.

The sample was varied in age, gender, and tenure, as can be seen in Table 2. The age of participants ranged from 21-63 years, with the mean age at 37 and a standard deviation of 8.9. The distribution of age in this population was slightly positively skewed with a median of 36. The population included 65 males (61%) and 42 females (39%). The tenure of the participants with the organization ranged from 4 months to 18 years. The average tenure was 4.3 years and the standard deviation at 3.6 years. The tenure of the participants had a heavy positive skew, such that the median tenure for this population was 3.1 years. While this population had more males than females, there was high variability in age and tenure within the organization.

Measures

In order to measure the various aspects of the Unfolding Theory and their presence in the employee's decision to leave, a new online exit survey was created.

Table 2. Demographic Characteristics (n=107).

Variable	n	%	Mean	Standard Deviation (SD)
Age (years)			37	8.9
20-29	23	21%		
30-39	49	46%		
40-49	25	23%		
50-59	7	7%		
60+	3	3%		
Gender				
Male	65	61%		
Female	42	39%		
Tenure (years)			4.3	3.6
0-3	51	48%		
4-7	41	38%		
8-11	7	7%		
12-15	6	6%		
15+	2	2%		

This survey was intended to measure each aspect of the theory in a closed-ended way to eliminate errors due to interpretation. The survey consisted of 12 to 17 questions, utilizing a branching logic where the answer to one question may lead to an additional question depending on the answer. For example, if an employee chose “Lack of Career Development Opportunities” as a primary reason for leaving, an additional question appeared that asked for more details about the choice (i.e., “Lack of training opportunities to further my job skills,” “Lack of opportunity for career growth through promotions,” “Lack of clear career path discussed with manager,” and “Lack of autonomy to try new things or work on different projects”). Employees could check as many of these reasons that applied. Most of the survey response formats were multiple choice with three open-ended questions used to corroborate the closed-ended responses. No aspect of the Unfolding Theory was measured solely by an open-ended question.

Shock. The first aspect of the Unfolding Theory measured on the survey was shock. Shock was defined as “a very distinguishable event that jars the employee toward deliberate judgments about their jobs and, perhaps, to voluntarily quit their job” (Lee & Mitchell, 1994, p. 60). There were one closed-ended and one open-ended item used to measure this aspect. The closed-ended question read, “Was there an initial event that triggered your thoughts about leaving the company?” The respondents selected one of the following; “Personal event (i.e., spouse relocating),” “Organizational event (i.e., a manager change),” “Job alternative (i.e., an attractive job offer elsewhere),” or “No specific event.” Those who chose one of the first three responses were categorized as having experienced a shock, while the last option indicated no shock. A second (open-

ended) follow up prompt was given to elaborate, which stated “Please explain the trigger event.” These responses were used to validate the previous answer in regards to presence or absence of a shock.

Script. The presence of a script meant the employee had previously decided that if some event occurred, he or she would leave the organization. A script makes the decision to leave essentially automatic, requiring little deliberation. Two closed-ended questions were used to determine whether a script was present. The first question was “Was there an initial event that triggered your thoughts about leaving the company?” The choices again were “Personal event (i.e., spouse relocating),” “Organizational event (i.e., a manager change),” “Job alternative (i.e., an attractive job offer elsewhere),” or “No specific event.” The second question asked, “Which of the following contributed to your decision to leave the company?” Those who chose “Personal Event” from the first question and “Life Events” from the second question were categorized as having a script present, since a personal decision rule is usually present with a script (Kulik et.al, 2012). When the participant chose “Life Events (i.e., a move, retirement, personal/family decision),” a subsequent question was asked to validate the response: “What specific life event caused you to leave?” If the participant chose “Retirement,” “Relocation,” “Return to school,” or “Personal or Family decision” (i.e., becoming a stay-at-home parent), the script was validated.

Image Violation. Image violation consists of three components: value, trajectory, and strategic image. The questions aimed at measuring this concept included both open- and closed-ended response types. The first question asked “Which of the

following contributed to your decision to leave the company?” The response format was a multiple-choice list and employees could choose all choices that applied. Choices that indicated image violation included “Dissatisfied with Organization Leadership/Strategy” (value image), “Dissatisfied with Manager” (value image), “Role is not a Fit” (value and trajectory image), “Lack of Career Development Opportunities” (trajectory and strategic image), and “Dissatisfied with Compensation/Benefits/Reward & Recognition” (trajectory and strategic image).

Once any of the above categories was selected, a subsequent question was used to validate the presence or absence of an image violation. For example, when “Dissatisfied with Manager” was chosen, the question “Which of the following lead to dissatisfaction with the manager?” was asked. Choices included, “Manager did not give support necessary to successfully perform the job,” “Manager did not treat me with respect,” “Manager gave unfair performance reviews,” and “My manager did not foster a motivating work environment.” Employees could check as many reasons as applied.

One open-ended question was used to supplement this information, “What, if anything, could the organization or your manager have done to get you to stay?” Answers to this question further explained why the employee left. If an employee answered this question describing any of the choices to the first question (i.e. lack of career development opportunities), the answer to the original question was changed such that they were categorized as having an image violation. For example, one employee failed to check the box for “Lack of Career Development Opportunities” but answered this question by describing that there was a “lack of internal movement opportunities”

and was therefore categorized as having an image violation. This was the case for four employees.

History of Dissatisfaction. History of dissatisfaction was the next aspect measured. The first question used to assess this was, “Considering everything, how would you rate your overall satisfaction with the organization?” The response format was a 5-point Likert scale ranging from “very dissatisfied” to “very satisfied.” A second question was also asked, stating, “How likely are you to recommend this organization as a great place to work to your friends, family, or professional contacts?” The responses ranged from 0 (Not at all) to 10 (Extremely). The answers to both questions were combined in order to determine if this aspect was present. The first question was reverse scored from 1-5, such that very satisfied was a 1 and very dissatisfied was a 5. The second question was mapped to a 5-point scale to match the first such that 9 and 10 were coded as a 1, 8 and 7 were coded as a 2, 6 and 5 were coded as a 3, 4 and 3 were coded as a 4, and 2, 1 and 0 were coded as a 5. The average of the two coded responses was then calculated. Those with a coded average of 4.0 or above were categorized as having a history of dissatisfaction.

Job Alternative. The final aspect of the Unfolding Theory measured on the survey was the occurrence of a job alternative. This aspect had two closed-ended questions and one open-ended question to validate the occurrence of a job alternative. First, similar to script, if “Job alternative” was chosen as the answer to the question, “Was there an initial event that triggered your thoughts about leaving the company?” a job alternative was present. The second question evaluating a job alternative was “Did

you search for a new position or were you recruited by another company?” The responses were multiple choice and included “Searched,” “Recruited,” or “Neither.” Those who chose either “Searched” or “Recruited” were categorized as having a job alternative. Finally, the question, “What organization are you going to next?” was open-ended and used to confirm the presence of a job alternative.

Procedures

Collection was commenced when the manager submitted the employee’s termination into the company’s database and the employee was identified as leaving voluntarily in the following 2-4 weeks. The researcher then downloaded the list of email addresses from the database and emailed the employees before they actually left the company. The email included a description of the study, a link to the online survey in Qualtrics, and a statement that responses would be anonymous and confidential. The participants were informed that the survey was entirely voluntary and the participants could choose to not fill out any part of the survey. The survey was completed online with no defined period of time to complete the survey. The survey itself required about 5 minutes to complete.

Once the survey responses had been downloaded, the data were examined to ensure each employee actually filled out each question on the survey. If there was not sufficient information to categorize the participant, the survey was discarded. This was the case for one employee who was discarded. Based on his or her responses to the survey, each employee was categorized into one of the five cognitive pathways. The researcher, along with another rater, independently categorized the employees. The

second rater was a master's degree student in the Industrial/Organizational Psychology Program at San José State University and therefore was familiar with research techniques. After each had categorized the results, Cohen's Kappa was calculated to determine inter-rater reliability. Cohen's Kappa across all 107 surveys was 0.76, which is considered to be a "substantial" level of agreement (Landis & Koch, 1977). After the initial categorization and calculation of Cohen's Kappa, both raters discussed disagreements and reached a consensus decision, such that the raters agreed on how the participant should be classified.

Results

Descriptive Statistics

A list of the survey items and the percent of answers chosen are presented in Table 3. The first question determined the presence of a shock, asking “Was there an initial event that triggered your thoughts about leaving the company?” Most participants chose one of the first three choices (Organizational event (37%), Job alternative (28%), and Personal event (22%)); therefore, the majority of employees were categorized as having a shock. One consequence of this finding was that Pathways 1, 2, and 3 were much more likely to occur than Pathways 4a or 4b, which do not begin with a shock.

The second question asked was, “Which of the following contributed to your decision to leave the company?” This question was first used to determine whether a script was present, with those choosing “Life events” for the answer as well as “Personal event” from the first question indicating the presence of a script. A low number of employees chose both of these answers (17%), making the likelihood of them fitting into Pathway 1 low. This question was also used to determine whether an image violation occurred. Answers that indicated an image violation included “Dissatisfied with organization leadership/strategy,” “Dissatisfied with manager,” “Role is not a fit,” “Lack of career development opportunities,” and “Dissatisfied with compensation/benefits/reward & recognition.” Over half of the sample (64%) chose at least one of these options, again making Pathway 1 much less likely than the other four, as Pathway 1 is the only pathway that does not include an image violation.

Table 3. Descriptive Statistics of Survey Items

Survey Item	n	Percent
Was there an initial event that triggered your thoughts about leaving the company?		
Organizational event (i.e., a manager change)	40	37%
Job alternative (i.e., an attractive job offer elsewhere)	30	28%
Personal event (i.e., spouse relocating)	23	22%
No specific event	14	13%
Which of the following contributed to your decision to leave the company? (Participants can choose more than one)		
Lack of career development opportunities	44	41%
Dissatisfied with manager	31	29%
Life events	26	24%
Dissatisfied with organization leadership/strategy	26	24%
Dissatisfied with compensation/benefits/reward & recognition	11	10%
Role is not a fit	9	8%
	Mean	SD
Considering everything, how would you rate your overall satisfaction with the organization?		
Scale: 1 (very satisfied)-5 (very dissatisfied)	2.57	1.17
How likely are you to recommend this organization as a great place to work to your friends, family, or professional contacts?		
Scale: 0 (Extremely) to 10 (Not at all)	1.76	.91
	n	Percent
Did you search for a new position or were you recruited by another company?		
Recruited	40	37%
Searched	38	36%
Neither	29	27%

Whether a history of dissatisfaction was present was based on responses to two questions: “Considering everything, how would you rate your overall satisfaction with the organization?” and “How likely are you to recommend this organization as a great place to work to your friends, family, or professional contacts?” The two answers were averaged and those above a 4.0 were categorized as having a history of dissatisfaction. Of the entire population, six participants (6%) were categorized as having a history of dissatisfaction. This low percentage made categorization very difficult for Pathways 4a and 4b, which both start with a history of dissatisfaction.

The final question measured the presence of a job alternative by asking, “Did you search for a new position or were you recruited by another company?” Of the entire sample, 78 participants (73%) chose the responses “Searched” or “Recruited” and thus were categorized as having a job alternative. Combined with the high percentage of shock occurrence, the high prevalence of a job alternative increased the likelihood of being classified into Pathway 3.

Overall Classification

The classification of exiting employees across the Unfolding Theory pathways can be seen in Table 4. In addition to providing the classification rates for this study, those of previous studies are included for comparison, allowing to see both the similarities and differences in rates. Overall, 87 of the 107 (81%) employees in this study were able to be classified according to the Unfolding Theory. Previous studies testing the Unfolding Theory had classification rates ranging from 77% to 100%, this study was on the lower end of that range. There are several possible reasons why this may have

occurred. Previous studies relied on more subjective information to classify participants, which may account for the higher classification rates. This study used more objective measures to classify participants, which may have led to the lower classification rate. However, this study still supports the Unfolding Theory in its ability to explain why employees decide to leave an organization.

Table 4. Classification Rates

Pathway	Current Study (n=107)	Lee et al. (1996) (n=44)	Lee et al. (1999) (n=229)	Donnelly & Quirin (2006) (n=84)	Morrell et al. (2008) (n=352)	Kulik et al. (2012) (n=228)
1	17%	14%	3%	7%	1%	22%
2	8%	14%	3%	24%	0%	15%
3	54%	32%	59%	20%	33%	31%
4a	2%	18%	4%	33%	0%	7%
4b	0%	23%	24%	7%	43%	25%
Total Classified	81%	100%	93%	91%	77%	100%

Pathway Classification

In addition to the overall classification rate, it is interesting to explore the classification distribution across the pathways. Pathway 1, which began with a shock, included a script (i.e., a predetermined behavior), and ended with no job alternative, accounted for 18 (17%) participants. Previous studies testing the Unfolding Theory ranged from a classification rate of 0 to 22% for Pathway 1. The current study reflects a similar percentage of the population following Pathway 1.

The classification rate of Pathway 2 was 9 (8%) participants. Pathway 2 begins with a shock event, includes an image violation, and again has no job alternative.

Empirical support of this theory has a range of classification rates from 0 to 24%. The percentage obtained in this study was in line with previous research.

In the third pathway, employees start their decision to leave with a shock event, experience an image violation, and have a job alternative when the decision is made to leave the organization. This pathway was the most common among the sample, representing 58 (54%) employees, which is consistent with previous research that had findings ranging from 5% to 59%. The main difference between this pathway and Pathway 2 is the presence of a job alternative. The high incidence of a job alternative in this sample may be either a reflection of the IT population or the location of the organization, which is in the Silicon Valley and may have more job opportunities available.

The final two pathways had the lowest occurrence in this sample. Pathway 4a represented 2 (2%) participants and Pathway 4b had no classifications. Previous research ranged from 0 to 33% for Pathway 4a and 7% to 43% for Pathway 4b. Pathway 4a and 4b both begin with a history of dissatisfaction, lead to an image violation; however, Pathway 4a does not contain a job alternative whereas Pathway 4b does. Pathway 4b shows the biggest difference between the classification rates of previous studies. This population had a very low percentage of employees with a history of dissatisfaction and had a high amount of shock events. Therefore, the employees in this sample were not constantly dissatisfied, but instead experienced a shock event that incited the thought of leaving the organization.

Overall, this study is both similar and different from previous studies testing the Unfolding Theory. As for similarities, the overall classification rate is consistent with previous research, showing general support for the theory. In regards to specific pathway classification rates, this study again corresponds to previous research, with the exception of Donnelly and Quirin (2006), which showed large differences. Overall, the most commonly reported pathway in all but one study was Pathway 3. Based on this body of research, employees most often experience a shock event, have an image violation, and have a job alternative when making the decision to leave an organization.

Although this study had commonalities with previous research, there were also several differences. In particular, this study showed large discrepancies in classification rates from the Donnelly and Quirin (2006) study which may be due to the different methodologies used. First, Donnelly and Quirin used an interview method that did not address all the aspects of the Unfolding Theory, whereas the current study used a more objective measure to apply the theory by using a survey. The previous study relied on the researcher's interpretation of the interview results, which may have led to inflated classification rates. Second, Donnelly and Quirin did not address all the aspects of the Unfolding Theory, specifically failing to ask about history of dissatisfaction. This may have inflated the classification rates of Pathways 4a and 4b as the researchers assumed this aspect to be present if a shock event was not.

The one pathway classification rate in this study that was different from all other studies was Pathway 4b, which had a 0% classification rate. This may be due to the

specific sample used or the wording of the question measuring history of dissatisfaction. These will be addressed further in the Discussion section.

Unclassified Employees

The overall classification rate of employees at 81% left 19% of the sample (20 of the 107 employees) not classified. Therefore, these employees were examined to discover commonalities. Of the 20 employees who could not be classified, eight had a job alternative in common but no other aspects of the Unfolding Theory consistent enough to draw conclusions. Among the remaining 12 employees, two main themes emerged. The most prevalent, characterizing five participants, included a shock, a history of dissatisfaction, an image violation, and a job alternative. This new pathway, named Pathway 5, is a combination of Pathway 3 and 4b, with both a shock and a history of dissatisfaction. This may suggest that while the employees were dissatisfied, a shock event was still needed for them to actually leave the organization.

The second theme among the unclassified employees consisted of four employees who reported a shock and a job alternative, but did not have a history of dissatisfaction or image violation. For example, one employee chose “Job Alternative” as the shock event and described further that he or she “was offered a director-level job and a 33% pay raise.” There was no indication of an image violation for this employee. When asked, “What, if anything, could the organization or your manager have done to get you to stay?” the answer given was, “Nothing, it was just time to try something new.” This pathway is most similar to Pathway 3, but without an image violation, so therefore it was called Pathway 3a. When an employee can confidently and easily find a job alternative,

they may not feel the need to place blame on the organization, no matter the shock event. This pathway may occur when economic times are good and employees can easily find new jobs, such that if a shock event occurs and an employee chooses to leave an organization, there is no image violation. More specifically, there is no violation of the employee's values, career goals, or ability to achieve those goals. They simply choose to happily pursue some other job alternative.

Additional Analyses

Given the skewed distribution of tenure and the slightly skewed distribution of age discussed earlier, it was of interest to test whether the classification rates varied by employee demographics. The demographics that were examined included tenure, age, and gender. The distributions of each pathway by demographics and the results of the chi-square analyses can be seen in Table 5. A chi-square test of independence was conducted to see if any of the pathway distribution rates were significantly different based on the various demographics. All results were not significant, meaning the pathway distributions did not vary by tenure, age, or gender. This suggests that the process for turnover decisions does not differ across demographic sub groups.

Table 5. Relationship Between Pathways and Demographic Variables

Tenure		
Pathway	≤ 3yrs (n=51)	> 3yrs. (n=56)
1	14%	20%
2	10%	7%
3	51%	57%
4a	4%	0%
4b	0%	0%
Total	79%	84%

$\chi^2(4)= 3.09, p > .05$

Age		
Pathway	≤ 37 (n=62)	> 37 (n=45)
1	18%	16%
2	11%	4%
3	53%	56%
4a	0%	4%
4b	0%	0%
Total	82%	80%

$\chi^2(4)= 5.03, p > .05$

Gender		
Pathway	Female (n=42)	Male (n=65)
1	26%	11%
2	7%	9%
3	57%	52%
4a	0%	3%
4b	0%	0%
Total	90%	75%

$\chi^2(4)= 4.30, p > .05$

Discussion

The purpose of this study was to develop an employee exit survey to test the Unfolding Theory of Turnover comprehensively in its ability to capture the thought processes employees engage in when deciding to leave a company. This theory is the first to propose the notion that employees follow a cognitive process when deciding to leave an organization. This study utilized a survey in order to limit interpretation error and biases, therefore providing more accurate exit data to adequately test the theory. Ultimately, having more accurate exit data will lead to a better understanding of why employees decide to leave an organization. In this section, the overall findings of the study are discussed, as well as the study's implications, strengths, and limitations, ending with suggestions for future research.

Overall Findings

Overall, the findings of this study support the use of the Unfolding Theory as the foundation for creating an instrument to gather exit data. The classification rate of 81% in this study shows the exit survey based on the Unfolding Theory is able to capture the majority of reasons why employees choose to leave an organization. The findings were also consistent with previous research in individual pathway classifications, showing Pathway 3 to be the most prevalent. The biggest difference observed in this study was that no employees were classified in Pathway 4b. This may be due to the nature of this sample or the specific survey item (e.g., "Considering everything, how would you rate your overall satisfaction with the organization?") that asked about history of dissatisfaction, which is the beginning of Pathway 4b.

Further analyses compared the pathway classification rates by the demographic variables tenure, age, and gender. The results of these analyses indicated that classification rates did not vary as a function of these demographic variables. Employees that were unable to be classified were examined further, suggesting improvements that may be made to the theory. These suggestions are discussed in the section below.

Theoretical Implications

This study is similar to previous studies testing the Unfolding Theory by offering general support for the theory with a high pathway classification rate. This study was also consistent with previous research in showing Pathway 3 (shock, image violation, job alternative) to be the most prevalent. Although the overall classification rate was high, the data suggests additional pathways may exist. The unclassified cases were examined with two themes emerging that are proposed as additional pathways. First, employees followed what is proposed as Pathway 5, characterized by a shock, a history of dissatisfaction, an image violation, and a job alternative. This pathway best represents a combination of Pathways 3 and 4b, as both involve an image violation and a job alternative. However, Pathway 3 begins with a shock event and Pathway 4b begins with a history of dissatisfaction. Both of these aspects are present in Pathway 5. This pathway may characterize employees who are constantly dissatisfied, but still need a shock event to make them leave. For example, a poor performance review or an attractive job offer elsewhere may be the tipping point for a dissatisfied employee to finally decide to leave.

The second theme consisted of simply a shock and a job alternative. This pathway can be called Pathway 3a, as it is most similar to Pathway 3. Pathway 3 starts

with a shock event, followed by an image violation, and a job alternative. Pathway 3a is similar, but without an image violation. This Pathway may serve to capture when economic times are good and employees can easily find new jobs. So when a shock event occurs, be it an organizational shock or an unsolicited job offer, the employee may choose to leave with no negative feelings felt toward the organization.

Practical Implications

Organizations can apply the findings of this study to both the collection of exit data and the subsequent use of that data. First, by utilizing a survey methodology, rather than interviews, organizations will have both methodological and pragmatic advantages. Methodologically, organizations can gain more objective data (Giacalone, Stuckey, & Beard, 1996) and better ensure employee honesty by offering a more confidential process (Wilkinson, 2005). In interviews, it is harder to capture objective data given interviewer bias and error (Staples, 1991). Using a survey eliminates both of these problems and creates a more consistent process. Organizations can more specifically use this theory when creating an exit survey to gain better insights into the turnover process. Closed-ended survey questions, when paired with open-ended questions that ask about the highlights and lowlights of working for the organization (Morrell and Arnold, 2007), can provide a great deal of useful information. Pragmatically, surveys save more time and money relative to interviews, as more than one survey can be administered at one time through electronic format. Surveys also save money on the supplies and personnel needed to conduct exit interviews.

The classification of employees into the various pathways of the Unfolding Theory can be used to develop effective retention strategies. On a broader level, organizations can differentiate between preventable and unpreventable employee losses. For example, employees who follow Pathway 1 (shock and script) are usually unpreventable. The opportunity to move, go back to school, or become a stay-at-home parent may occur by no fault of the organization. Organizations should instead focus their retention efforts to lessen the likelihood of employees leaving on a pathway that encompasses an organization or job related event, such as a manager disagreement or a more appealing job opportunity.

Retention strategies can also be tailored based on the most prominent pathway in a particular organization. For example, if the majority of employees are leaving because of unsolicited job offers (Pathway 3), organizations can begin to attack the problem directly, perhaps by adjusting compensation to remain competitive or being prepared to make counter offers to the employee (Mitchell, Holtom, & Lee, 2001). If, on the other hand, most employees are leaving due to a shock (Pathway 1, 2, and 3), organizations can better prepare for potential shocks, such as performance appraisals, by putting processes in place to relieve stress and anxiety. For example, managers can be explicit about why they are giving specific ratings and ask for employee input throughout the process. This will help employees feel more involved in the appraisal process and better understand why the ratings were given, which can alleviate negative reactions due to feelings of unfairness and disrespect. For those not leaving due to a shock, but instead due to mounting dissatisfaction, an organization can be sure to conduct periodic monitoring of

satisfaction levels and implement strategies to increase satisfaction. This can include things such as holding one-on-one meetings between employees and their manager to address any current problems or allowing for a flexible work schedule.

Strengths

The strengths of this study are both in the design and administration of the survey. First, a survey was created based on the different aspects of theory, thus allowing for each aspect to be measured. In previous research, the surveys did not measure the aspect history of dissatisfaction, which created an incomprehensive test of the theory (Lee, Mitchell, Wise, & Fireman, 1996; Donnelly and Quirin, 2006). The design of this survey also relied on mostly closed-ended questions making the subsequent classifications more objective than open-ended questions. Many of the previous studies used interviews (Donnelly and Quirin, 2006; Kulik, Treuren, and Bordia, 2012; Lee, Mitchell, Wise, & Fireman, 1996), meaning the results relied on the interpretation of the researcher to categorize employees into pathways, which may have led to lower reliability. Using interview data to categorize employees may also lead to inaccuracies as each researcher is subject to their own interpretation.

In this study, data was proactively collected before the employees left the organization. All previous research either conducted interviews or administered surveys anywhere from one to five years after the employees left the organization. This may have resulted in memory errors and also failed to capture the employee's thought processes as they were deciding to leave the organization. By collecting data while the employees were still with the organization, this study was able to better assess the theory in

capturing the thought processes the employees go through when deciding to leave, as they were still going through the process.

Limitations and Future Research

One limitation of this study is the collection of data from only one industry and geographic region. Different industries and locations may influence the prevalence of various pathways. For example, in the Silicon Valley, where this study was conducted, job ads are increasing and unemployment is going down making one aspect of the theory, job alternative, much more likely. Classification rates may also vary by industry, such that an engineer may be more likely to follow a certain path versus a salesperson. This may be one explanation for the low classification rate seen for Pathway 4b. Further research should be done in various industries and locations to gain more insights on these differences.

Given the low classification rate of Pathway 4b, there may be a limitation in the items intended to measure the history of dissatisfaction aspect of the Unfolding Theory. The current survey measured history of dissatisfaction by combining the answers to two questions: “Considering everything, how would you rate your overall satisfaction with the organization?” and “How likely are you to recommend this organization as a great place to work to your friends, family, or professional contacts?” These questions may measure satisfaction levels at one point in time instead of a ‘history’ of dissatisfaction. Instead of asking for a general/current level of satisfaction, these items may need to be more multi-dimensional to better assess where the dissatisfaction lies (i.e. with the job, the manager, etc.). This question should also be framed more with a sense of satisfaction

over time. For example, a future survey item could ask, “Over the last year, have you become increasingly less satisfied?” This question may offer a better distinction of history of dissatisfaction, from a more general satisfaction item.

A second limitation pertaining to the survey design is around the aspect of script of the Unfolding Theory. This survey evaluated script through the answers to two questions. First, to the question, “Was there an initial event that triggered your thoughts about leaving the company?” employees had to choose “Personal event.” Second, employees were asked, “Which of the following contributed to your decision to leave the company?” From, the list of answers, employees had to choose “Life events.” If an employee chose both of these answers, they were categorized as having a script. During categorization, these questions may lead to some confusion about whether employees really did have a script or not. The answers “Personal event” and “Life events” are so similar that if an employee chose one but not the other, it is hard to be certain a script was not present. This confusion could lead to lower accuracy in categorizing a script, given that employees had to have the specific answers to both questions, when one or the other may have inferred the presence of a script. While a script is usually a personal event (Kulik et al., 2012), another question could have been asked for better clarification. One question, used in previous research (Lee et al., 1999; Morrell et al., 2008) could have been added, asking “At the time I left my job, I had already determined that I would leave IF a certain event were to occur (i.e., acceptance to graduate school).” This would have assessed the aspect of script differently than the first two questions and made determining the presence of a script more clear when classifying survey responses.

Future research on the Unfolding Theory should focus on testing the theory in different industries. Tests of this theory in various industries may show different dominant pathways as well as propose new pathways that may be industry-specific. As mentioned above, the low percentage of employee classification seen for Pathway 4b may be due to the specific sample used. So, by testing this theory in different populations, it can be determined whether Pathway 4b is simply less prevalent in some populations than others.

As Pathways 4a and 4b both begin with a history of dissatisfaction, a future study could include satisfaction data over time to more accurately classify employees. This data could come from annual engagement surveys or any other employee survey that measures satisfaction levels. This could provide more information about satisfaction throughout the tenure of employees. This data would be more a complete and reliable assessment of the history of dissatisfaction aspect of the Unfolding Theory.

Conclusion

Employee turnover will continue to be a concern for organizations in the future. By understanding the pathways employees follow to turnover and using that data to facilitate retention initiatives, organizations may be able to limit the amount of turnover experienced. Building upon conventional theories, the Unfolding Theory of Turnover examines the cognitive decision process an employee experiences when deciding to leave. Organizations should understand that an employee's decision to leave is not a straightforward one, but instead may involve some combination of shock, history of dissatisfaction, script, image violation, and job alternatives. Organizations can use this

theory to guide the construction of instruments for collecting exit data to mitigate the concern of employee turnover.

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