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Motivations to Become and Stay Marine: Examining the Connection of the Psychological Contract to Recruiting and Retention

June 2023

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Department of Defense Management

Naval Postgraduate School

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Prepared for the Naval Postgraduate School, Monterey, CA 93943.

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ABSTRACT

This qualitative study aims to thoroughly assess the current business practices in the communities of recruitment and retention, taking into account the principles of behavioral psychology. By applying three key theories to the life cycle of a Marine—prior to, during, and after their first enlistment—this study provides valuable insights into the psychological contract that underpins recruitment and retention practices in the USMC. Based on the findings of the evaluation, recommendations will be presented to the USMC, outlining actionable strategies for enhancing their recruitment and retention efforts. This study is essential for anyone seeking to gain a deep understanding of the underlying psychological factors that impact the effectiveness of recruitment and retention practices within the USMC.



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Now the work really begins.



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LIST OF ACRONYMS AND ABBREVIATIONS

ASVAB	Armed Services Vocational Aptitude Battery
AVF	All-Volunteer Force
CMC	Commandant of the Marine Corps
DEP	Delayed Entry Program
DP	Decision Point
EAS	End of Active Service
ECC	End of Current Contract
FD2030	Force Design 2030
FTAP	First Term Alignment Plan
HRM	Human Resource Management
IST	Initial Strength Test
JTBD	Jobs to Be Done (Theory)
MARSOC	Marine Corps Special Operations Community
MCO	Marine Corps Order
MCRC	Marine Corps Recruiting Command
MCRISS	Marine Corps Recruiting Information System
MCT	Marine Combat Training
MCTFS	Marine Corps Total Force System
MEPS	Military Entrance Processing Station
MMEA	Manpower Management Enlisted Assignments
MOS	Military Occupational Specialty
PAC	Prospect Applicant Card
PCI	Psychological Contract Inventory



PCT/PC	Psychological Contract Theory
PT	Physical Training
RS	Recruiting Station
RSS	Recruiting Sub Station
SITG	Skin in the Game (Theory)
SNCOIC	Staff Non-Commissioned Officer In Charge
SOI	School of Infantry
SSgt	Staff Sergeant
STAP	Subsequent Term Alignment Plan
TECOM	Training and Education Command
TFRS	Total Force Retention System
TM2030	Talent Management 2030
USMC	United States Marine Corps



EXECUTIVE SUMMARY

This study explores the current recruitment and retention practices of the USMC, with a particular focus on applying principles of behavioral psychology. By utilizing the “Psychological Contract Theory,” “Jobs-to-Be-Done Theory,” and “Skin in the Game Theory,” the research examines the connection between why individuals join the Marine Corps and why some choose not to reenlist. The findings of this study provide critical insights into the underlying psychological factors that impact the effectiveness of recruitment and retention strategies within the USMC.

This research employs a mixed-method approach, using data from the Marine Corps Recruiting Information Support System (MCRISS) and Total Force Retention System (TFRS) to highlight the lack of data connectivity between the two systems. The study identifies a clear disconnect in the management and accountability of both the recruitment and retention communities. The USMC’s emphasis on recruiting has resulted in a lack of infrastructure to support and hold accountable the retention system.

The research recommendations offer practical solutions to enhance recruitment and retention practices in the USMC. In the short term, recruiters and career planners should collect benefit tag data for analysis, and the direct chain of command should have access to individual marine profiles to better assist in conversations about retention. Career planner interviews need to be shifted to the left, giving the Marine Corps more time to retain its members. Additionally, the exit interview criterion should be changed from negative to positive.

In the long term, the TFRS and MCRISS systems should be consolidated into one system, with improved connectivity and collaboration between the two communities. This would enable the creation of a strong infrastructure that supports and holds accountable the retention system. The study also suggests that the USMC needs a great consultant to help build strong communities.

Overall, this thesis provides a comprehensive assessment of recruitment and retention practices in the USMC, emphasizing the importance of behavioral psychology in



understanding these practices. The insights and recommendations provided in this research can be immediately applied by decision-makers in the USMC to enhance their recruitment and retention efforts, leading to better outcomes for the organization.



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I. INTRODUCTION

The United States Marine Corps (USMC) is a proud and noble organization dedicated to serving and defending the nation. Its success relies on the bravery and commitment of its all-volunteer force (AVF). Yet, in recent times, a pressing issue has arisen—a decline in the number of enlisted personnel choosing to extend their service. This decline threatens to erode the strength of the USMC and raises serious concerns about its ability to fulfill its mission in the face of future challenges. With this in mind, recruitment and retention have become critical topics of discussion among decision-makers, who seek to ensure the longevity and effectiveness of this revered institution.

A. CURRENT SITUATION OF RECRUITING AND RETENTION

The current Commandant of the Marine Corps, General Berger, has identified a need to shift efforts from recruiting to retention. “We have created a personnel model that is overly focused—and, in fact, dependent—on recruiting rather than retention” (Berger, 2021). Traditionally, the Marine Corps has focused its efforts on recruiting, leaning into the strategy of having enough individuals join every year to ensure that the force stays young which means that they are “[more] physically fit, [have better] cognitive function, and [are suited better] to increase readiness” (Berger, 2021, p. 2). The need to shift focus from a model that relies on recruiting to one that considers both efforts as one, comes from the recent publication of Force Design 2030 energizing the idea that “aging the force” enhances the Marine Corps’ ability to be more lethal, mobile, resilient and to partner with other forces.” Additionally, the document alludes to how the Marine Corps can better manage its talent in order to have the right people, with the right skills, in the right place. General Berger’s priority is to “design a force suited to the reality of the pacing threat as prescribed by the National Defense Strategy in order for us to face our adversaries confidently. We will continue to challenge the status quo and continue to ask all the hard questions—regardless of the discomfort they produce” (Berger, 2021, p. 1).

Force Design 2030 is mentally tasking Marines to prepare for the next conflict, describing how the Marine Corps is swiftly addressing changes in weaponry and assessing



capabilities, whereas the Talent Management 2030 (TM2030) publication from the Commandant addresses the Marine Corps' human capital problems. "The core objectives of all modern personnel management systems are to recruit individuals with the right talents, match those talents to organizational needs, and incentivize the most talented and high performing individuals to remain with the organization" (Berger, 2021, p.4).

In this thesis, I propose a shift away from the conventional, narrow focus on financial incentives for retaining personnel and towards a more comprehensive perspective that recognizes the role of non-financial factors in shaping employee engagement and commitment. By embracing this view, the Marine Corps can gain a deeper understanding of why individuals seek employment and service opportunities and what they hope to achieve through these experiences. This new approach takes into account the intrinsic aspects of service, exploring the motivations and desires of those who are considering joining the United States Marine Corps and what they hope to gain from this experience. In doing so, it offers valuable insights into how the Marine Corps can cultivate a positive work environment that attracts and retains the best talent.

By adopting a life-cycle approach to recruitment and retention in the Marine Corps and utilizing data effectively, the institution can significantly enhance its ability to attract and retain top-quality Marines. It is imperative that the organization embraces a human-centered perspective and takes into account the viewpoint of a Marine. By doing so, the Marine Corps can provide clear understanding of the benefits it offers and fulfills its promises to its personnel. Failure to do so may result in the loss of highly-skilled and capable Marines who seek opportunities elsewhere, jeopardizing the institution's effectiveness and success. It is time for the Marine Corps to take proactive steps towards improving its recruitment and retention efforts and prioritize the well-being and satisfaction of its personnel.

1. Barriers to Retention

a. One barrier to retention is Marines not getting what they signed up for

The initial screening process of a prospective Marine by a recruiter is a critical moment in shaping their perception of the Marine Corps. The recruiter's role is not only to



assess the candidate's eligibility but also to effectively communicate the value proposition of becoming a Marine. This interaction sets the foundation for a psychological contract between the potential Marine as a customer and the Marine Corps as a supplier. The contract implicitly promises the delivery of benefits that were initially offered and perceived as part of the Marine experience.

However, the Marine Corps' fragmented systems fail to capture and connect valuable information on why a candidate chooses to join. As a result, the delay in retrieving this information can cause a breach in the psychological contract, leading to the inability to deliver on the promised benefits. Such a breach can have a severe impact on the morale and retention of Marines.

It is therefore crucial for the Marine Corps to recognize the significance of this initial interaction and ensure that it effectively captures and utilizes the candidate's data. By doing so, the institution can provide a seamless experience for its Marines, delivering on their promised benefits and ensuring their continued satisfaction and loyalty. The Marine Corps must prioritize the use of data to enhance its recruitment and retention efforts and maintain its status as a premier military organization.

b. "Jobs-to-Be-Done" (theory) explains why people stay and psychological contract breach explains why they may leave

To increase the likelihood of Marines remaining in the Marine Corps, the institution must fulfill the promises made during the initial interaction between the potential Marine and the recruiter. When the Marine Corps delivers on these benefits, it builds trust and reinforces the bond between the Marine and the organization. However, when the Marine Corps fails to deliver on these promises, it causes disenchantment and breach, leading to a higher likelihood of Marines leaving the service.

A contemporary framework called "Jobs-to-Be-Done" can provide valuable insights into why Marines choose certain benefits. Marines join the Marine Corps to fulfill certain benefits that align with their life goals. By identifying and understanding these "jobs," the Marine Corps can provide tailored solutions to help Marines achieve their objectives, resolve issues, and make progress in their lives.



It is imperative for the Marine Corps to recognize the significance of delivering on its promises and fulfilling the “jobs” that Marines are seeking to accomplish. By doing so, the Marine Corps can enhance its recruitment and retention efforts, ensuring that it retains top-quality Marines who are satisfied with their experience and motivated to serve. The Marine Corps must prioritize the fulfillment of its promises and take proactive steps to ensure that it meets the needs of its personnel.

c. Disenchantment

In my analysis, I provide insight into disenchantment, a feeling of disillusionment or loss of faith in something that one previously found appealing or believed in. Disenchantment can arise when expectations are not met, promises are broken, or reality does not align with what was expected or promised. When Marines experience a breach of the psychological contract, or feel that their needs are not being met in terms of their career aspirations within the Marine Corps (as determined by Jobs-to-Be-Done theory), they may become disenchanted, leading to a desire to leave the institution.

Disenchantment may occur at different points in a Marine’s career, such as when they realize that the Marine Corps is not delivering on what was promised, or when it is time to re-enlist. In such cases, Marine Career Planners will engage with the individual to better understand their motivations for staying in the Marine Corps, using similar tactics as recruiters to convince them of the benefits of staying while reinforcing or enhancing the psychological contract.

Overall, understanding disenchantment is critical to retaining talented Marines and preventing their separation from the Marine Corps. It is essential to ensure that promises made to Marines are fulfilled, and that their needs and aspirations are considered in the recruitment and retention process.

d. Marines aren’t getting what they signed up for because the process and systems that are in place to support recruitment and retention aren’t synced

Two systems, the Marine Corps Recruiting Information Support System (MCRISS) and the Total Force Retention System (TFRS), are used to track a potential Marine and



subsequently, once the individual has graduated boot camp, a Marine's career. These systems, for the sake of the future Marine Corps and the conflict it fights, need to be improved. Data collection, if leveraged appropriately, can paint a picture of a Marine's life for the Marine, and in turn serve as a better predictor of retention for the Marine Corps. The Marine Corps currently lacks the ability, because of its systems, to know why individuals join and why they leave.

Having two disconnected systems containing valuable Marine Corps information on its Marines creates a significant challenge for transparency and autonomy for both the individual Marine and leadership. When information is siloed and not accessible across systems, it leads to duplication of efforts, inefficiencies, and information gaps that can negatively impact decision-making at all levels. This lack of transparency and autonomy can lead to frustration and disenchantment among Marines who feel their needs are not being adequately addressed, while leadership may find it difficult to make informed decisions about resource allocation and personnel management.

By syncing these two systems, the Marine Corps can create a more cohesive and efficient approach to managing its personnel. A connected system can provide greater transparency and autonomy for individual Marines by enabling them to access and update their information easily. This system can also enable leadership to make informed decisions because they understand where their Marine is at and where they want to be in their career. It can improve communication and collaboration between different levels of leadership and facilitate the exchange of critical information needed for effective decision-making.

In addition, a synced system can help the Marine Corps adapt to changing circumstances more quickly, such as shifts in personnel needs or changes in mission requirements. This can ensure that the Marine Corps remains agile and responsive to evolving challenges while providing a more satisfying experience for individual Marines.

Overall, syncing the two disconnected systems, and potentially more in the future, containing valuable Marine Corps information is critical to enhancing transparency and autonomy for both individual Marines and leadership. Syncing can lead to improved



decision-making, greater efficiency, and increased satisfaction among Marines, ultimately resulting in a more effective and resilient Marine Corps.

2. Status Quo of Communities and Processes

Once a relationship is formed between a potential Marine and Recruiter, thousands of data points on a particular individual are collected, from general information like height, weight and birthplace to ratings and assessments of morality and mental attributes. During the initial screening phase, and what I call the *Onboarding Phase*, Recruiters are interested in making sure the individual meets the basic qualifications for enlistment and ensuring that they are able to ship to and graduate boot camp. After a potential Marine is sent to boot camp, the Recruiter's duties officially come to an end. It is unfortunate that not all Recruiters are able to input valuable information such as benefit tags into the system, which could help predict the probability of a Marine's career success and likelihood of reenlistment. However, it is important to note that the Marine Corps Recruiting Information Support System (MCRISS) was not designed as a tool for collecting human factors data. The lack of tracking or penalties for Recruiters and Career Planners who do not input valuable information exacerbates the challenge faced by our recruiting and retention systems. The separation between the two systems also creates difficulties in identifying and addressing this issue, resulting in a gap in transparency and accountability. The Commandant, General Berger acknowledges this problem in TM2030 (2021) by noting that "the Marine Corps is not effectively screening and assessing applicants before they enter service due to the combination of high recruitment targets and inadequate tools" (pp.4).

As we move forward to the next section, it is important to note that a closer examination of the recruitment and retention processes, as well as the communities that support them, can provide the Marine Corps with a clearer understanding of what is working and what is not.

a. Processes

Data inputted into MCRISS allows Recruiters to keep a running log of interactions and updates to a prospect's profile. Once an individual graduates boot camp, the data is



archived. Archiving this data signals that all the work a Recruiter did to recruit an individual is not valued. This missed opportunity to leverage the data that the Marine Corps collected and use it as a foundation to shape conversations with is a critical mis-step towards efficiency.

The Marine Corps may be failing to recognize the correlation between recruitment and retention by not offering any clear incentive to ensure accurate data entry, especially if the information is only utilized for a limited period. Effective processes allow for a flow of information but without an understanding about purpose and use, even the most efficient processes won't be worth using. While the Marine Corps Recruiting Command (MCRC) and Manpower Management Enlisted Assignments (MMEA) are two robust manpower communities that collaborate to assist their personnel, their policies and procedures may not fully prioritize the individual's welfare on both ends; the Marine and the Recruiter/Career Planner. Technological and personnel touchpoints to the systems should be considered when the Marine Corps takes a hard look at its systems through the lens of the user (Marine) journey.

When looking at each entity (recruiting and retention) as a program, what is the metric to know if it is successful or conversely, does more harm than good? Michael Dolence, the author of 'Strategic Change' offers the following:

The evaluation of a program's worth is a subjective process and can be evaluated from three different angles. The first perspective is the societal-political-economic perspective, which evaluates a program's value based on its impact on individuals. The second perspective is the goal-attainment perspective, which evaluates a program based on how effectively and efficiently it achieves its intended objectives. The third perspective is the cost-benefit perspective, which assesses value based on the relationship between the resources consumed and the quantity and quality of benefits received. The most appropriate perspective depends on the point of view of the stakeholders or evaluator. In the evaluation of recruitment and retention programs, an evaluator typically draws on all three perspectives. (Dolence, 1991).

This thesis focuses mainly on the societal-political-economic perspective of both the recruiting and retention programs.



b. Communities

Much like the systems they use to support their work, my analysis reveals that the recruiting community and retention community are not aligned. As seen in Figure 1, recruiting is under the purview of Marine Corps Recruiting Command (MCRC) and retention falls under Manpower Management Enlisted Assignments (MMEA) which is a branch off of Manpower and Reserve Affairs (M&RA). Both Recruiters and Career Planners have similar curriculums and attend the same location for schooling and their responsibilities and mission(s) fairly similar.

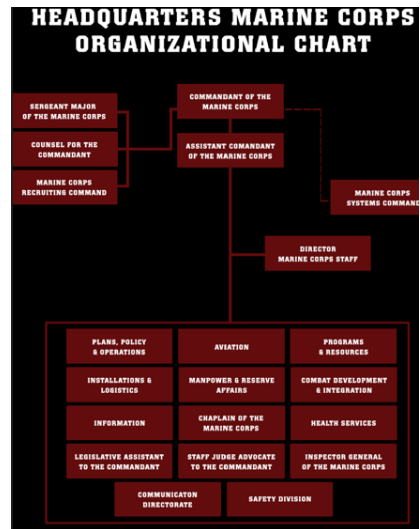


Figure 1. HQMC Organizational Chart. Source: Marines (2023).

The Marine recruiting community is a powerful force comprised of recruiters whose primary objective is to locate and attract “the ideal Marine candidate—an intelligent, lifelong learner who meets our rigorous physical requirements and comprehends the importance of being able to adapt to new threats in challenging environments as we modernize our equipment and tactics” (TECOM, 2023). MCRC recruiters and their support personnel have a clearly defined set of tasks to accomplish their mission. A wealth of guidance, doctrine, and updated Marine Corps Orders provide specific instructions to Marine recruiters, and those who fall under the Recruiting Command’s jurisdiction must adhere to this guidance or face being punitively replaced.



On the other hand, Career Planners and the MMEA community have a distinct objective that involves reenlisting eligible first-term and career Marines to fulfill MOS requirements and maintain suitable levels of career force experience. Their doctrine has not undergone any updates since 2010, and as depicted in Figure 2, the number of personnel assigned to Manpower Management Enlisted Assignments (MMEA) is limited to about 17, which is in contrast to MCRC’s two-star Major General in charge. Although MMEA is supported by M&RA (three-star Lieutenant General), the noteworthy point to consider is the distinct responsibility of recruitment and retention.

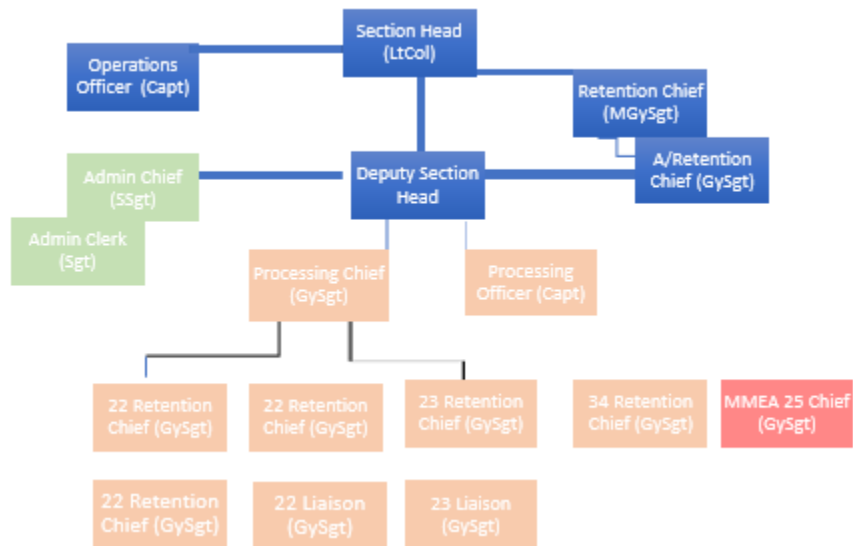


Figure 2. Manpower Management Organizational Chart.

Comparing these two communities’ mission statements and ecosystems, prompts the question, “if Recruiters are responsible (and accountable) to recruit, are MMEA and Career Planners responsible (and accountable) for retention?”

3. A Marine Corps that Delivers CMC’s Directive Is One that Syncs Recruitment and Retention

The Commandant of the Marine Corps (CMC) has emphasized the importance of adopting a maturation perspective on recruitment and retention in the Marine Corps. According to the CMC, modern “personnel management systems should focus on



recruiting individuals with the right skills, matching them to organizational needs, and incentivizing high-performing individuals to remain with the organization” (Berger, 2021). By combining data from MCRISS and TFRS, we can gain valuable insights into why Marines join and what factors influence their decision to stay or leave. This will enable the Marine Corps to make better predictions about retention, which in turn will help the Marine Corps invest more effectively in developing high-quality Marines. Synchronizing these systems will also enable the Marine Corps to create a value system for future initiatives and incentives, facilitate conversations between leadership and Marines about their futures, and provide insight to Marines about how staying in (or leaving) the Marine Corps aligns with their broader goals and lifestyle. Furthermore, synchronizing these systems will also benefit individual Marines by addressing their post-Marine Corps life.

B. SHIFTING PRIORITIES FROM RECRUITING TO RETAINING

The future of the United States Marine Corps relies on a strong and steadfast workforce. To achieve this, recruitment and retention must no longer be viewed as separate entities, but as integral components of a larger strategy. It is time to harness the power of data and insights, from the moment a potential Marine embarks on their journey, to create a life-cycle approach that prioritizes the needs and well-being of its people. By elevating the value of our most critical asset, the men and women who serve, we can ensure that the USMC remains lethal, ready, and equipped to meet the challenges of a rapidly changing world.

C. PURPOSE

This research aims to address the need for transformation in both the recruiting and retention systems by emphasizing the significance of the psychological contract established between the Marine Corps and its personnel. In addition to forecasting retention, we must also focus on leveraging the data we collect to enable better quality matching of individuals to their respective roles (or jobs), which will ultimately enhance retention rates among enlisted ranks. Moreover, it is imperative to foster a culture of transparency and communication, where Marines’ expectations align with what the organization can provide, resulting in a mutually beneficial relationship. To achieve this, the Marine Corps



may consider establishing regular forums for dialogue, both formal and informal, between leadership and enlisted personnel to discuss ongoing challenges and develop solutions together, based on empirical and theoretical research such as this thesis.

D. RESEARCH QUESTIONS

The research questions addressed in this thesis are:

1. How does the psychological contract, created in the recruiters' and career planners' offices, affect in recruitment and retention of U.S. Marines?
2. How does the Marine Corps currently use the human data it collects in its systems, to assist in recruitment and retention efforts? How might it better leverage the data it has to promote retention across a Marine's career?

E. ORGANIZATION

The value proposition of the following chapters lies in their ability to offer a unique and comprehensive view of the Marine Corps' recruitment and retention landscape, centered on the human experience. By applying three critical theories—"Psychological Contract," "Jobs to be Done," and "Skin in the Game"—the chapters showcase the complex nature of a Marine's life cycle and their decision to reenlist. With a focus on these critical theories, this research provides invaluable insight into the motivations, behaviors, and expectations of Marines, which can inform and improve the Marine Corps' recruitment and retention strategies. Through a human-centric lens, this research offers a deeper understanding of the Marine Corps' personnel management systems, enabling leadership to better match Marine talents to organizational needs, incentivize top performers, and retain the most talented and committed individuals. Ultimately, this research aims to support the Marine Corps' mission by providing actionable insights that can enhance the organization's ability to attract, develop, and retain a highly skilled and motivated workforce.

The first theory, in Chapter II, covers the "Psychological Contract" (PC), and explains the important connection that is made with a potential Marine and the Marine Corps. I introduce PC using a prototypical case study of a potential Marine, following the



timeline of their first contract through their decision to opt-out of reenlistment. PC offers a human-centered perspective on this process, focusing on the touch-points, decision points and phases with recruiters and career planners. This analysis also highlights the need for the USMC to adopt enriched data collection methods to gain deeper insights into the expectations and experiences of potential and current Marines.

The theories of “Jobs to be Done” and “Skin in the Game” in Chapter III, offer insights into why Marines choose to join the Marine Corps by using the benefit tag process as a proxy for the task they are trying to accomplish. While recruiters and career planners, as representatives of the Marine Corps, are considered to have a clear stake in the process, the responsibility for retaining Marines is not clearly defined for other stakeholders. Therefore, my analysis suggests that improvements are necessary to enhance the processing of Marines with benefit tags as well as improvements in the career planning community in the USMC.

In Chapter IV, I perform an in-depth audit on systems used in the recruiting and retention communities through the lens of a user-journey; the audit targets pain points from the perspective of both Recruiters and Career Planners who operate off of two separate systems.

Chapter V in this thesis presents concrete recommendations for USMC decision-makers and opportunities for future research, aimed at building a new and much needed human-centered perspective.

Finally, Chapter VI presents an enhanced and re-imagined prototype case study of a Marine who gains substantial advantages from the recommendations proposed in this thesis.

F. CASE STUDY: MARINE JOHN

This thesis advocates for bringing a human-centered perspective to recruitment and retention in the USMC, an atypical perspective that may not have been traditionally emphasized in military contexts, but one that is critical for ensuring the long-term success of the USMC in a rapidly changing world. To encourage this shift and provide



understanding of how a Marine interacts with the current retention and recruitment systems and communities in the Marine Corps, a prototypical case study is provided. The case study highlights certain decision phases and decision points that Marines will face as they move through the recruiting and retention processes. Although fictional, this case study was created from conversations captured from recruiters, career planners as well as individual Marine experiences.

John is a senior in high school whose grandfather served in the Vietnam war. John is about to graduate high school in Akron, Ohio and is on his school's football team. As John considers where he may apply himself in the future, he knows himself well enough to discern that he wants three things to be present in his life at this time: stable income, physical fitness and the opportunity to pursue an undergraduate degree. At this point in his life, no one has encouraged him to join the military; however, he has a cousin that joined the Marines recently and heard positive feedback from his cousin's experience.

At this moment, John is in the *pre-contemplation phase* concerning his decision to join the Marine Corps: although he is generally aware of future career opportunities, he is not yet considering a career in the Marine Corps. John is somewhat knowledgeable about military service because of what his cousin mentioned about his time in the Marine Corps as well as his loose understanding of what his grandfather participated in during Vietnam. He is curious about pursuing college, as most of his friends are moving out of state to do so.

John recently saw an ad on the internet about the Marine Corps: a young man running through a cornfield. As the scene progresses, the man running starts to get a team of others to run with him as each person stops what they are doing once they see the determination and physical effort put forth. John witnessed multiple aspects of a training environment and the sweat and dedication to complete a mission. The commercial ended with Marines in their Dress Blue uniform. The commercial was powerful for John. It got him thinking about how fulfilling and respectable it may be for him to do something 'like that'. The Marine in the commercial seemed to be working on a team with others- just like he does with his football team. Additionally, John liked the words that were said in the advertisement, "America's Few."



At this stage, John encounters his first Decision Point (DP #1): he desires to know more about the Marine Corps so he decides to make an appointment with the local recruiter's office. Before his appointment, he searches online for more information on what the Marine Corps stands for and pictures himself in a Marine Corps uniform.

As he enters the recruiting office, John is greeted by Staff Sergeant Booth, a career Marine who is in his second year of recruiting. Staff Sergeant Booth welcomes John, sits down with him and starts asking him questions about himself. He enters the information he is hearing into a system called the Marine Corps Recruiting Information Support System (MCRISS). As John sits across from the SSgt and looks around the office, he is immediately drawn into the blue and red walls. He asks the SSgt, "Why are the walls all blue and red? Kind of intense colors."

The SSgt smirks and says, "It's called a 'blood stripe' and yes, the Marine Corps is intense."

SSgt Booth and John converse about what questions John has about the service. Such questions like "what would I be doing?," "where would I be living?" and "how much money would I be making?" are part of the conversation. John envisions what his life would be like as SSgt Booth answers him. At this part in the conversation, SSgt Booth brings out a recruiting tool, benefit tags. Benefit tags (Figure 3) are a set of [physical objects] that are used by recruiters to identify the needs and motivations of the potential Marine. The tags can be divided into two categories: tangible and intangible benefits. The tangible benefit tags are "technical skills," "professional development opportunities," "physical fitness," "educational opportunities," and "financial security/advancement and benefits." The intangible benefits are "leadership and management skills," "courage, poise, and self-confidence," "self-reliance, direction, and self-discipline," "pride of belonging," "challenge," and "travel and adventure."





Figure 3. USMC Enlisted Benefit Tags. Source: Marines (2023).

SSgt Booth puts all the benefit tags in front of John and asks him to pick out the ones that mean the most to him. The SSgt doesn't explain all of them but once John picks his three, "physical fitness," "educational opportunities," and "travel and adventure," SSgt Booth explains how the Marine Corps can give him the opportunity to get exactly what he finds to be most important.

SSgt Booth enters this conversation into MCRISS. There were a few times that SSgt Booth has to pause because the system keeps lagging which disrupts the flow of the conversation and the SSgt knew he would have to stay late to enter the data in. The SSgt continues to enter in basic information about John and the conversation leads into a bit of story-telling as John listens to the experiences of SSgt Booth.

At this point, John is in the *contemplation phase* and is excited and continues to think about what his life looks like as Marine. This is largely shaped by the benefit tags exercise as well as the stories that SSgt Booth describes of his time in Korea exploring the city of Osan when he was a Private First Class (PFC), his time at Camp Pendleton going to all the beaches and finally his time as a Recruiter. John learns SSgt Booth was a volunteer who earned a monetary bonus by agreeing to be a Recruiter.

SSgt Booth asks John a simple question, "Do you think you have what it takes to become a United States Marine?"

In truth, John isn't sure at this point. He had seen pictures of Marines holding rifles, rappelling down a huge tower and assisting in a hurricane effort, and he wondered where the beaches and all the adventure was. He asks the SSgt about going to school and the process for that. SSgt Booth tells him that once he "hits the fleet," he can enroll in school immediately. John feels secure with what he is being told and trusts what the SSgt is saying about how the Marine Corps will be supportive of what John wants to pursue in his career and life. The SSgt's question prompts John to consider all the opportunities the Marine Corps is offering him; it is all positive.

John answers the SSgt with a resounding "yes," but follows it up with "but I need to talk to my parents first," SSgt Booth nods and seems to understand. He goes a step further, inviting John's parents to the recruiting office. John feels comfortable.

John goes home that night and tells his parents about his experience at the recruiter's office. He says that all of the things he wants to achieve could be possible with the Marines. "They said I would be able to go to school and keep training in the gym!" He is enthusiastic about the possibilities that seem endless in his mind. His parents, knowing that John had made wise decisions in high school and was generally a "good kid," join him in picturing what his life looks like as a Marine. They support his decision to join and believe it will be beneficial in the long run for him to do so.

SSgt Booth calls John the next day and asks him a few more questions about his availability in the next week or so. "We're going to need you to do an IST, which is an initial strength test. It is a piece of cake and you will do just fine." By this point, SSgt Booth had labeled John as an "Alpha" and had entered into MCRISS his attributes that qualified him, with the exception of his screening at Military Entrance Processing Station (MEPS). The SSgt was confident that John would have no issues getting into the Marine Corps. This is SSgt Booth's job responsibility and is investment: finding quality individuals like John, attracting them to a life in the Marine Corps, and getting them through boot camp. After the training pipeline, Marines would fall under the purview of their unit's Commanding Officer Career Planning Program which assists Marines in preparing for a future enlistment and SSgt Booth has no ties back to the Marine.



John comes back to the office to finish the processing and paperwork of enrolling into the Delayed Entry Program (DEP); he is now in the *Pre-Boarding and Recruitment Phase* and concurrently, at Decision Point Two. He runs his Initial Strength Test (IST), completes the Armed Services Vocational Aptitude Battery (ASVAB) and goes to MEPS. At MEPS, John receives his Military Occupational Specialty (MOS) as an administrative specialist. This was not what he initially desired to do and was actually his third choice after engineering and embark. He isn't sure what happened and when he asked the processor, they told him "at least you got your third choice." John's onboarding is fairly straightforward and without issue. John continues to ask the SSgt about when he would be able to enroll in school; the SSgt says, "I really don't know the process. I've never gone to school." John continues to be curious about when he will be able to go to school since he is constantly seeing his friends on social media posting about being accepted to colleges out of state.

When the day comes, John and SSgt Booth stand in the recruiting office, John raises his right hand and commits to enlisting in the Marine Corps. He invites his parents, videos in his cousin, and takes plenty of pictures to send to his friends. He did it. He got in.

John ships off to boot camp the next month. He receives a few letters from his recruiter during the 13 weeks there but not much is said about the future, other than, "it will get better, I promise."

John completes boot camp and graduates at Parris Island, South Carolina. He, and his family, are so proud of him.

John hears from his Recruiter once during the ten-day period Marines get to have reprieve from training before they start the next phase.

John or Pvt Coolidge now, goes through Marine Combat Training and MOS school where he is trained to be an administrative specialist. Admin school is easy for him and he is finally assigned to his first duty station, 29 Palms in California. He had heard from others that it was one of the worst duty stations in the Marine Corps but because he hadn't been to many other places, he only has his town in Ohio to compare it to. John is now in the *Onboarding Phase*.



John spends the first 12 months of his career with a job that he wasn't expecting, in a place he was unfamiliar with, on a strict schedule of PT (physical training) with his admin shop (which didn't fit in line with his own physical fitness schedule), and feeling homesick. He is counseled a handful of times by his Corporal, who believes John could work harder. John is confused as he is currently in the *Maintenance and Development Phase*.

Finally, at 18 months in the fleet, he is brought into the Career Planner's office for an 'interview'. A Sergeant, whose job description is to counsel Marines on being competitive for reenlistment, asks John a few questions about how he is fitting in with the Marine Corps and if he likes it. John describes his situation, "my Corporal is telling me I cannot do school until I am proficient in my MOS, I get back to my room with my roommate's stuff everywhere and I am so tired, I barely have time to work out for myself, I am forced to participate in a training session that I am not interested in. I am not enjoying this and I don't really want to do this anymore."

The Career Planner attempts to convince the Marine on staying in. He reminds him of all of the opportunities and even gets out the same benefit tags. "What did you choose when you were in the recruiter's office?" John says he can't remember but thinks it was maybe "Physical fitness" and "pride of belonging." The Career Planner isn't able to check on this information because John's information is now going to be put into a system called TFRS and its basic functions are to process reenlistment packages and track interviews that are required on a fixed schedule from a Marine's End of Current Contract (ECC).

John leaves the Career Planner's office and feels indifferent about his time there. He thought that by telling the Career Planner that the Marine Corps is not turning out the way he wanted something might be done to make it more like the experience he thought he was signing up for. Instead, he didn't make any progress.

The next time John sees the Career Planner is more than halfway through his contract, and has 14 months left before his ECC. At this point, he has been promoted to Lance Corporal and has a bit more experience to reflect on. John gets told by his Sergeant that he needs to go see the Career Planner for an interview, again. He schedules the 'FTAP (First Term Alignment Plan) interview' and sits across the desk from the Career Planner, a



Sergeant on his second contract in the Marine Corps. The Career Planner, Sergeant Duffy, opens up with a few general questions about John's experience being an administrator and pulls up John's record on the Total Force Retention System (TFRS) to counsel John on how he can become more competitive for promotion which in turn, makes him more competitive for retention. At this point, John is considered a Tier 2 Marine which is a score calculated in TFRS. This means that among his peers in his MOS, he is ranked in the second tier, at the time the report is pulled.

Sergeant Duffy explains that at this time, John doesn't have to make a decision on reenlistment but that he should start thinking about it because this is his FTAP interview and the package that he must submit for reenlistment will be due soon. The Career Planner also explains how John can improve his scores on the rifle range and by earning the next belt in the Marine Corps' Martial Arts Program can enhance his chances of becoming a Tier 1 Marine. John tells Sergeant Duffy that he will attempt to do so. The discussion continues and Sergeant Duffy asks John if he likes his current job. "It's okay, I guess," he pauses. "I thought I was going to be doing something more like my buddies in the infantry." Sergeant Duffy asks John why he thought that, and John tells him about the conversation with his recruiter, where he was told he was likely to get the 0311 MOS. Unfortunately, at MEPS John wasn't given the option and was instead assigned to Administration, the 0111 MOS. Sergeant Duffy encourages John to make the best of it and keep performing. He tells him about potential lateral moves into other available MOSs but none of the other jobs are what John was looking for either. John then asks about how he can sign up for school and the Career Planner tells him to contact the education center. John signs his interview and leaves the office a bit deflated and Sergeant Duffy enters all the information from the interview in an open text box in TFRS.

John is now ten months out from his EAS and decides not to re-enlist. His career in the Marine Corps is just not doing what he thought it might do for him and he just went to a mandated Transitional Readiness seminar where he created a strong resume to apply for jobs in the welding industry; he feels more prepared to get out than stay in. He schedules his 'Commanding Officer's exit interview'. During this interview, he sits down with Sergeant Duffy again and explains why he decided not to reenlist. "I wanted to get my



hands dirty and I had expectations that the job the Marine Corps had for me was more involved physically. I also wanted to go to school but I was so busy getting my MCMAP belt higher as well as my rifle range score that I didn't have a ton of time to attend school. I finally got to a Tier 1 but I really think school would have made me better at my administrative job" Sergeant Duffy marks a few boxes on his sheet, John signs the interview and they both walk to the Commanding Officer's office.

John sits down with the Commanding Officer and is told to speak candidly during this interview. The Commanding Officer starts to ask John similar questions as the Career Planner did and John gives the same responses. "I thought the Marines would be different, like I was told by my Recruiter, cousin and friends. I thought I would be able to go out and really contribute to the fight and if I couldn't do that, at least feel a part of a team, go to school or travel."

The Commanding Officer, an infantry man by trade, yells for Sergeant Duffy. The Sergeant comes running in, "Yes, Sir?"

"Duffy, explain to me why I have a Tier 1 Marine in my office saying he wants to go into the infantry and you told him he couldn't."

"Sir, respectfully, he can't. That MOS isn't accepting lateral moves and historically, they never have."

"What about MARSOC? Did you talk to him about that MOS?"

"I didn't Sir, once the Corporal said he wasn't going to re-enlist, I figured he had made up his mind."

"Duffy, you are responsible for retention. You are telling me that now we have a fully qualified Marine whose community's boat spaces filled up and he doesn't have a spot there and that it is practically too late to see if he can get screened for MARSOC?"

"Yes, Sir. I don't have the power to make decisions like that but I can try to call my Staff Sergeant up at Division to see if he can get the screening process moved forward for him but..."



John cuts them both off. “Gentlemen, I don’t think the Marine Corps is going to give me what I thought I signed up for. At this point, I am going to request to do a skill bridge program during the last four months of my contract, then go to college, get my degree and use what experience I have gained to apply it to a civilian job.”

Both of them give a small nod of approval as if they understood where John was coming from. The paperwork is processed and John is out of the Marine Corps eight months later.

What if John’s expectations of the Marine Corps were captured in a system from recruiting through the retention pipeline that provided transparency to both John and his immediate leadership? Would knowing why John joined give insight into why he left? Throughout the rest of my thesis, I will draw on psychological theories to demonstrate the significance of prioritizing the needs and motivations of both potential and current Marines, and utilizing technology to gain a better understanding of their behavior in order to better predict retention.



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II. UNDERSTANDING THE PSYCHOLOGICAL CONTRACT

A. CHAPTER OVERVIEW

The purpose of this chapter is to provide an analysis of Psychological Contract Theory (PCT) as it relates to decisions to join and retain in the United States Marine Corps (USMC). All contracts, written or unwritten, are a pervasive aspect of organizational life. Due to the need to shift efforts from recruiting to retention in the USMC which is noted in documents such as Talent Management 2030 and Force Design 2030, PCT can provide valuable insight into why Marines join, then depart or retain during their first written contract.

In Section B, the history and roots of PCT will be explained, along with the growing research conducted in the past decade. This research has been driven by employers' budding interest in identifying the factors that are conducive to maintaining employee motivation and loyalty within an organization.

Section C will apply the theory to the Marine Corps, particularly as it is seen in both recruitment and retention practices.

Section D presents the Marine life cycle as it relates to the psychological contract and proposes phases, decision points and touchpoints that Marines have with recruiters and career planners. It suggests that we look at the Marine life cycle through the lens of a Marine in their first contract.

Finally, in Section E, recommendations for near-term action are suggested.

Throughout this review, I highlight gaps in the research or application of PCT. PCT is a newer theory to both the world of organizational psychology as well as Human Resource Management (HRM) and due to the current state of research, the literature, although sufficient, is sparse. These gaps are identified throughout this chapter and set conditions for follow on research relating to recruitment and retention through a human-centered lens.



B. HISTORY AND ORIGINS

Applying the Psychological Contract Theory to the world of recruiting and retention can provide valuable insight into why Marines depart or stay in the Marine Corps. PCT highlights that the conversations taking place in USMC recruiters' and career planners' offices are powerful psychological commitments and the Marine Corps could benefit greatly by capturing the data points within these conversations to understand why Marines decide to enlist and why they leave or stay.

The psychological contract, sometimes known as the “psychological work contract” (Argyris, 1960; Levinson et al., 1962; Schein, 1965, 1978) is rooted in social exchange theory, which posits that a relationship between two parties is created through a process of cost-benefit analysis (Homans, 1958, pp.597). This social and economic exchange will be discussed later in the chapter as it is an important factor to note that a psychological contract is shaped both by social and economic influences.

Psychological contracts can occur any time during the life-cycle of an employee and employer relationship. Unlike a physical contract, where the parameters of the working relationship are outlined clearly on paper, psychological contracts are based on unwritten expectations established between (potential) employees and employers. From the pre-boarding and recruitment phase to the re-negotiation phase, amendments to the contract can be made. This means that the PC is ever-evolving over the course of the employee's tenure with the organization. The focus of this chapter will be on mapping the decision points during an employee's career to the psychological contract formed in the pre-boarding and recruitment phases and throughout the maintenance and development phases.

“A Psychological Contract is rooted in an employee's belief in a reciprocal obligation between the employee and the organization” (Rousseau, 1989). Different from a physical contract where both sides enter into an agreement on a hard copy document, the psychological contract is a mutual understanding of what role each party will fill and how they will deliver on the expectations aligned with that role. Individuals who enter into a psychological contract may feel that the organization that they are a part of has failed to fulfill their end of the contract. “Perceived breaches of the psychological contract have



been found to reduce employees' trust, job satisfaction, intentions to remain with the organization, sense of obligation, and in-role and extra-role performance" (Robinson, 1996; Robinson et al., 1994; Robinson and Morrison, 1995).

Substantial research on the psychological contract didn't surface until the early 1990s, when academics and practitioners began searching for new and inventive people-management techniques, leading to the application of the psychological contract in talent management. Prior to this, the relationship between employers and employees had not been thoroughly examined, and the discussion was limited to Barnard's (1938) equilibrium theory, which stated that the continued participation of employees relies on adequate rewards from the organization. However, Barnard's theory went beyond monetary rewards and suggested that to achieve equilibrium, organizations must offer a blend of both monetary and non-monetary incentives to motivate individuals to contribute to the organization's objectives.

Rousseau (2000) introduced the idea of "transactional psychological contracts," which she defined as short-term exchanges of employment agreements about specific performance terms, which means the agreements between parties are narrow, with a limited period of time that does not include training and other developments. Such contracts captured concerns about the current labor market, its flexibility and how it relates to the employee and employer relationship. Barnard and Rousseau's research is helpful in understanding talent management and HR because they both offer valuable insights into the factors that motivate individuals to contribute to an organization.

Barnard's theory of equilibrium highlights the importance of providing both pecuniary and non-pecuniary incentives to encourage individuals to cooperate and contribute to an organization's goals. This is particularly relevant in the context of talent management and human resources, as the USMC needs to understand what motivates Marines in order to attract and retain top talent. By offering a mix of both monetary and non-monetary rewards, the Marine Corps can create a work environment that is satisfying and fulfilling for employees, which in turn can help to improve Marine engagement and retention.



Similarly, Rousseau's research emphasizes the importance of creating a psychological contract between an organization and its employees, in which the organization promises certain benefits in exchange for the employee's contribution. This is also relevant to talent management and HR, as organizations need to clearly communicate their expectations and commitments to employees in order to establish a strong and mutually beneficial relationship. By creating a positive psychological contract, the Marine Corps can build trust and commitment with Marines, which can help to improve retention and engagement.

Current research highlights that a psychological contract is formed from the perspective of the employee, not the organization (Rousseau, 1989). Typically, an organization puts in writing what their expectations of the employee are. For example, a written contract may state that an employee has certain health benefits or discuss arrangement of financial compensation, but it does not detail specifics such as performance or behavior that the employee is due to deliver on. This does not mean that the contract is one sided but rather that an institution as a whole lean on the written contract to ensure that they are not obligated to do more than what is written.

Rousseau was at the forefront of linking the formation, importance, short and long-term effects of psychological contracts, as well as articulating their development, evolution and maintenance, including how they are breached or violated. Her view emphasizes the importance of reciprocation between an employee and employer in the workplace, highlighting two contracts that are formed between parties, one written and one unwritten.

a. Types of Psychological Contracts

Although researchers disagree on the exact features of a psychological contract, four types of contracts are prominent in the research: transactional, relational, balanced and transitional (Rousseau, 1989). These types of PC differ from one another on two dimensions (displayed in Figure 4): the duration of the agreement and the specificity of performance terms.



		Contract requirements	
		Specific	Weak
Time	Short term	Transactional	Transitional
	Open ended	Balanced	Relational

Figure 4. Psychological Contract Matrix. Source : Rousseau and Benzoni (1994).

Transactional psychological contracts are characterized by short-term agreements that pertain to specific performance terms. The scope of the agreement is narrow and has a limited time frame, and does not involve training or development opportunities (Rousseau, 2000). Examples of a transactional psychological contract include a babysitter or a seasonal employee. This type of psychological contract is tied to economic terms and conditions, where financial incentives are linked to short-term performance and may not extend to the long-term.

Relational psychological contracts, on the other hand, involve long-term exchanges in employment agreements with non-specific performance terms. According to Rousseau, these contracts may stipulate an employer’s commitment to providing stable wages, long-term employment, and supporting the well-being and interests of employees and their families. Blau refers to this as a social exchange agreement between the parties, where employees perceive their relationship with the employer as more than just an exchange of money or services. A relational psychological contract has an open-ended, indefinite, and dynamic nature with a broad scope (De Cuyper & De Witte, 2006; Rousseau, 1990). An example of a relational psychological contract is a teacher’s aide who dedicates additional time and effort to assist a professor in a course, and in return, the professor mentors the aide and presents opportunities that they would not have been exposed to otherwise.

Balanced psychological contracts aim to balance socio-emotional and economic terms, where employers commit to providing continuous training and enhancing worker’s long-term growth and development both within and outside the company (Hui, Lee, and Rousseau, 2004). Balanced psychological contracts are long-term agreements with specific performance terms. An example of a balanced psychological contract is similar to a



relational psychological contract, with the exception that it is a long-term agreement. Longer-term opportunities for growth are offered to the employee in exchange for high performance on work assignments.

Lastly, transitional psychological contracts involve short-term exchanges without specific performance terms (Rousseau, 2000). These contracts do not represent a true psychological contract as they present no commitment from either party (Hui et al., 2004). Figure 5 illustrates the dynamic nature of the psychological contract. In conclusion, the Marine Corps could benefit from a balanced psychological contract that considers the established psychological contracts in the Recruiter's office.

A career in the Marine Corps and the relationships built during the time of enlistment, fall most closely in line with a relational psychological contract. The individual Marine often believes that earning the title Marine means much more than just having a job-it it means that the Marine Corps has bestowed the honor of a Marine identity on those who have earned it by graduating boot camp. This means that the USMC must communicate the value of the Marine Corps identity and culture to prospective recruits, as well as provide opportunities for Marines to develop meaningful relationships within the organization. It also means that the USMC must live up to its commitments to its Marines, by providing a supportive and fulfilling work environment, as well as opportunities for personal and professional growth.

By recognizing and honoring the relational psychological contract between the USMC and its Marines, the organization can build a strong and loyal workforce, which is essential for achieving its mission and maintaining its reputation as a world-class military organization.

C. PSYCHOLOGICAL CONTRACTS APPLIED TO USMC RECRUITING

As noted in the Marine Corps' recruiting order, recruiters have a "serious obligation to ensure that applicants fully understand the true nature and scope of their agreement" (MCO 1100.1, pp. 1-6, b 2011). The order goes on to say, "Applicants must be honestly informed of what they expect from the Marine Corps and of what the Marine Corps expects from them" (MCO 1100.1, 2011). These statements reflect that the Marine Corps knows



that in order to uphold Marine Corps' values of honor, courage and commitment, recruiters must be honest about the 'product' they are selling so that there is no confusion or misunderstanding on what to expect when enlisting. However, after creating and sending out a feedback form to nine recruiters past and present in support of this research, the consensus on the question, "*Did you ever discuss anything outside of the written contract with a potential Marine (applicant)/ Marine that offered assurance that the Marine Corps would deliver on selected benefit tags?*" was clear: Recruiters build a relationship and rapport by sharing stories of *only* positive experiences in the Marine Corps.

In the case of recruiting, the psychological contract begins with potential Marines' perceptions about what the organization can offer them. This may come from an outside influence such as a marketing campaign or a family member who has had an experience with the military. As explained by Social Exchange Theory (Homans, 1958), these perceptions are shaped by an economic exchange process between the recruiter and the potential Marine that results in social behaviors that maximize benefits and minimize costs for one or both parties. These perceptions, although subjective and potentially malleable, lay the foundation for the formation the formation of the psychological contract. Both parties involved in the creation of the psychological contract take on ownership and responsibility for both the individual Marine as well as the USMC.

The organization contributes to psychological contract formation primarily through what information they present to the potential employee. Through marketing and open-source information, the potential Marine begins forming an understanding of what their life looks like while working with and for the United States Marine Corps. This understanding may be based on a subjective perception or 'selective perception' (Postman & Bruner, 1949), which is when an individual deems their perception, which is really a limited picture created by their own mind to fit expectations, to be reality. Recruiters assist in this process with a set of benefit tags, which allow potential Marines to envision a Marine Corps experience that is uniquely tailored to their individual goals and objectives. These benefit tags play an integral part of building perceptions as they are 11 different motivations and incentives that are both tangible and intangible, that reinforcing that the Marine Corps can fulfill the goals and objectives of the potential Marine.



During the formation of the PC, a level of trust is formed between both parties. This trust plays a large role on both sides: the Recruiter trusts that the potential Marine will deliver on their side of the contract by fulfilling expectations and bringing skills that they presented to the USMC, the potential Marine trusts that the organization will deliver on the benefits it promised during their four-year physical contract.

If potential Marines' expectations are surfaced in the formation of the PC, the responsibility falls on the Recruiter to either confirm or deny if that reality is a possibility and be clear about what the future may look like if the potential Marine decides to contractually sign on. If not made clear, the psychological contract functions as an assumption on the part of a potential Marine: The Marine Corps is obligated in certain ways to deliver on promises made as long as the Marine performs.

There are a number of reasons parties may hold misaligned expectations about the psychological contract. "Because psychological contracts represent how people interpret promises and commitments, both parties in the same employment relationship can have different views" (Rousseau & Wade-Benzoni, 1994). First, as Rousseau notes, psychological contracts are characterized by uncertainty, subjective value and change. Other research has indicated that it is a response to various signals and communication from the employer (Dries & De Gieter, 2014). This suggests that there is great value during the Pre-Boarding and Recruitment phase, which I define as the stage before onboarding of a Marine in coming to understand the view of what the organization offers. This creation of a foundation, built by the individual and organization is reinforced during the onboarding stage where the misaligned expectations can be clarified so that the individual understands what to truly expect. This is why it is important that those that represent the Marine Corps on recruiting duty, are transparent that they, themselves presently have no influence on what happens to their career post boot camp graduation or if those benefits can be delivered on whatsoever, in their career.



D. UNDERSTANDING PSYCHOLOGICAL CONTRACTS IN THE MARINE LIFECYCLE

The Marine Corps recruits a varied demographic into its ranks. Every person joins the USMC with his or her own set of expectations derived from life experience such as a broad understanding of how the world functions, recruiting materials that the organization produces or outside influences like family and friends.

The rational choice theory, created by economist Gary Becker (1968), posits that individuals strive to make optimal decisions based on their preferences and constraints, aiming to maximize their satisfaction. This theory assumes that individuals are rational actors who weigh the costs and benefits of each available option and make the best choice for themselves. However, behavioral economics suggests that humans are often influenced by emotions, cognitive biases, and social context, leading to decisions that are not necessarily in their best interest.

Emotions and external factors can significantly impact an individual's decision-making process, often leading to choices that are not necessarily in their best interest. Behavioral economics has shown that people are not always rational actors who make decisions based on careful evaluation of costs and benefits. Instead, they are often influenced by their emotions, cognitive biases, and social context.

For example, emotions such as fear, anxiety, and excitement can have a powerful impact on decision-making. A Marine who is fearful of being deployed to a dangerous location may decide to leave the military, even though they would benefit from staying in the service. Similarly, a Marine who is excited about the prospect of starting a new career may decide to leave the military, even though they know that staying in the service would provide them with long-term benefits.

Cognitive biases can also impact decision-making, leading to choices that are not optimal. For example, a Marine may be overconfident in their abilities and believe that they can achieve success in any career they pursue. This overconfidence may lead them to underestimate the benefits of staying in the military and overestimate the benefits of pursuing a civilian career.



Social context also plays a significant role in decision-making. Peers, family members, and other social groups can influence an individual’s decisions, even if those decisions are not in their best interest. For example, a Marine may be influenced by the opinions of their friends who have left the military and are enjoying successful civilian careers. This influence may lead the Marine to leave the military, even if it is not the best decision for their long-term goals.

For the purpose of this research, I examine enlisted individuals within their first term commitment. To assist in understanding the four- or five-year timeline of both the physical and psychological contracts, four decision points (DP) have been identified from the Marine’s perspective, spanning the duration of his or her first enlistment (Figure 5). These decision points are tied to touchpoints that the Marine Corps has in place currently, which present opportunities to collect data on individual Marines:

DP #1: Decision to inquire into the USMC

DP #2: Decision to join the USMC

DP #3: Decision to account for a negative PCT breach

DP #4: Decision to exit or stay serving

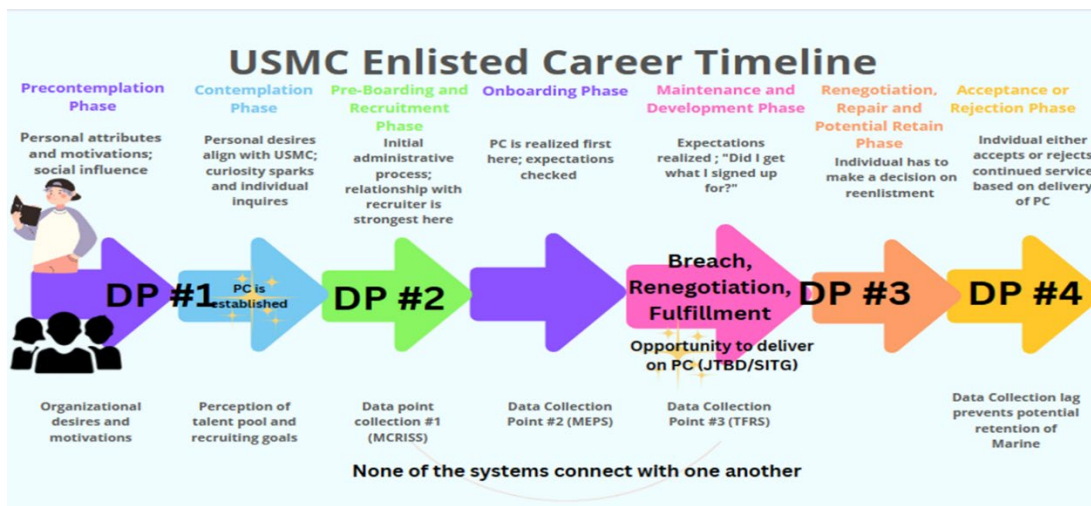


Figure 5. Enlisted Marine Timeline Describing Seven Phases, Four Decision Points, Three Data Collection Points, and Demonstrating that the MCRISS and TFRS Are Not Connected.

The decision points outlined above are embedded into larger phases that an individual encounters during this time. The following phases are a mix of terms that have been adopted from the Human Resources Management (HRM) community as well as the ‘Stages of Change’ (Prochaska and DiClemente, 1977) psychological theory. Incorporating and understanding these terms enhances comprehension of a Marine’s progression throughout their first year of enlistment, enabling more productive discussions regarding their future.

1. Precontemplation Phase

During the precontemplation phase, individuals begin to acknowledge their available options and develop initial perceptions of potential decisions, while unconsciously absorbing information that may shape their future decision-making. As the individual has not yet actively considered joining, this phase does not necessarily contribute to the psychological contract. An individual in this phase has not started to ask themselves explicitly about their future as it may relate to the military.

In the story of John, the precontemplation phase includes the initial attraction or interest in something such as a discussion with his cousin or a picture of his grandfather in uniform.

2. Contemplation Phase

The contemplation phase is crucial in establishing the psychological contract, as it is during this stage that individuals, like John who is now receptive to the idea of enlisting in the Marine Corps, actively assess their options and evaluate their future goals. In this phase, the individual considers various possibilities that align with their short-term and long-term objectives, in relation to serving in the military. In this phase, the potential Marine has made contact with the recruiter and starts to gather information on what the Marine Corps can offer. Simultaneously, the recruiter fosters a relationship with the interested individual, gathering information to make the Marine Corps a more desirable option. It is important to note that the recruiter remains present during this phase and continues to provide support until the newly enlisted Marine completes their boot camp. An individual in this phase has encountered the first decision point (DP#1).



3. Pre-boarding and Recruitment Phase

The pre-boarding phase consists of mainly administrative tasks that validate that the potential Marine is qualified to join the Marine Corps. Just as John was taken to Military Entrance Processing Station (MEPS) by his recruiter and run through a series of tests, this process includes the Initial Strength Test (IST), criminal background check, testing for the Armed Services Vocational Aptitude Battery (ASVAB), medical, moral and psychological clearance through the MEPS, and general paperwork.

During this time, the mentorship role of the recruiter is strengthened as the Marine has officially entered the DEP where the poolees of the recruiting station meet weekly to monthly. During this time, the goal of the recruiter is to keep the poolee qualified so that they can ship on their planned date. The psychological contract, in this phase, is at its peak strength as the recruiter has built up the poolee's expectations through discussions of what is to come at boot camp and beyond. This is also where the recruiter fulfills his/her duties as a recruiter by using systematic approaches such as benefit tags, a set of 11 tangible and intangible motivations to become and stay Marine primarily used as a sales tactic to home in on what the individual wants to get out of the organization. At this stage, the individual is looking for the Marine Corps to fulfill a certain role or "job to be done" as they are getting closer to their 'ship date' to boot camp. Routine in nature, recruiters are executing duties as prescribed by the institution and the written contract that the poolee signs at MEPS when they officially swear in. This is a Marine's second decision point (DP#2).

4. Onboarding Phase

The onboarding phase encompasses boot camp, Marine Combat Training (MCT) or School of Infantry (SOI), Military Occupational Specialty (MOS) school, and the initial arrival at the Marine's new unit. This phase is potentially the most impactful of the three, as it marks the Marine's transition from training to reality and the realization that the Fleet Marine Force (FMF) or "fleet" was their ultimate objective. At the beginning of this phase, morale is generally high as the Marine evaluates their new surroundings after successfully completing a rigorous entry barrier. Having fulfilled the promises outlined during the



psychological contract established in the recruiter's office, the new Marine eagerly anticipates the experiences to come.

During the onboarding phase, the Marine is not yet tracked by MCRISS or TFRS, and mentorship opportunities are limited due to their training status. However, upon arrival at their new unit, they may be assigned a sponsor or Non-Commissioned Officer to help them acclimate to their new environment. It is essential to understand that at this pivotal point in a Marine's career and the Marine's initial impressions of the Marine Corps may change. Collecting data on those impressions could be extremely useful for future conversations with a Marine on what they desire to do or accomplish now that they have made it through the training pipeline. A critical opportunity is missed by not having a system in place to understand better what expectations a Marine had when entering the service.

The onboarding process varies for each Marine depending on their assignment to IOC vs. MCT as well as their follow-on MOS school. The longest length of time a Marine is not tracked or monitored through existing recruiting or retention systems, may average six months based on the length of time of all USMC enlisted MOS schools.

5. Maintenance and Development Phase

The Maintenance Phase begins the first time a Marine meets with a career planner and ends after the Marine's FTAP interview. In this phase the individual begins to assess the degree to which their perceptions and expectations match their actual experiences. As an example, if an individual chose, via benefit tags, a motivation such as "travel and adventure" yet receives orders to a place near their hometown, they may start to wonder when that opportunity would be delivered on. In this phase, Marines begin tracking (implicitly or explicitly) whether the psychological contract they made with the institution has been breached. A psychological contract breach is defined as an employee's perception that his or her organization has failed to fulfill one or more obligations associated with perceived mutual promises (Gakovic & Tetrick, 2003). It is important to note that not all contracts are breached and many are fulfilled.



During this phase, the unit Career Planner has required interviews they must conduct per the respective Marine Corps Order on the Commanding Officer's Career Planning Program. The initial FTAP and any unscheduled interviews are completed during this phase. Career planners are responsible to conduct and track interviews for all Marines in the unit and during those interviews, if the Marine inquires about benefits, the career planner has no way to deliver on the benefits- they can only discuss how the Marine Corps may potentially deliver on them in the future. This means that new Marines sit down formally with a career planner, who possesses minimal authority to deliver on the jobs to be done that were established during the psychological contract, two times before the Marine gets to decision point (DP#3) out of four decision points.

6. Renegotiation, Repair and Potential Retain Phase

When a Marine reaches Decision Point #3, they may advance to the Renegotiation, Repair and Potential Retain Phase where the Career Planner, in conjunction with leadership, attempts to incentivize the Marine to continue service. At this point, the institution may offer a financial incentive such as a bonus (if they have a specific MOS) or offer the individual the certain possibility of a duty station. The psychological contract, rebuilt with the Career Planner, is being renegotiated during this phase. If repaired, retention of the Marine presumably higher, although if trust has been broken (through an unfulfilled psychological contract) it may be more difficult for the institution to convince the Marine that the next four years will be different from the previous.

Throughout this phase and at this decision point (DP#4), the Career Planner is using TFRS to refer to previous conversations (interviews) that have taken place, reminding the Marine considering their options of what they have achieved up until this point and what can be achieved in the future. Career Planners cannot guarantee that the Marine would be accepted for reenlistment, nor can they deliver on any other guarantees to the Marine. Thus, Career Planners are not in an official position to deliver on the 'product' that they are upselling.



7. Acceptance or Rejection Phase

The final phase of the recruitment and retention life cycle is where the Marine has a realization of the psychological contract, understands if and when the contract was delivered on or breached, and determines whether or not the organization that sold them on the career (product) was truly able to deliver on those promises. If the Marine Corps delivers on the terms of the PC the probability that the Marine re-enlists is likely higher. The outcome is a final decision point (Decision Point #4) where the Marine either continues service in the USMC or exits. This phase is shorter than the others due to the window of time that the Marine Corps imposes on the individual. According to the current Marine Corps order on retention, the Marine is able to submit a reenlistment package 12 months out from their EAS date. Once a decision has been made whether to stay in or get out of the USMC, actions to prepare for this transition start immediately.

Exit interviews serve as a valuable tool for organizations to understand the reasons behind an employee's decision to leave. However, to be truly useful, the data collected from exit interviews must be analyzed to make better predictions and prevent future departures. Organizational psychologist Adam Grant (Grant, 2010, p. 39) suggests that supplementing exit interviews with entry interviews could be beneficial as it allows employers to gather insights from employees when they first start working. In the case of the Marine Corps, conducting an exit interview at the end of a Marine's enlistment is too late to take any action. While the career planner collects data on departing Marines, they miss out on crucial information about why some individuals choose not to continue their service and why they would stay if potentially one or two things changed. To address this gap, collecting and analyzing information 18–22 months prior to a Marine's ECC (end of current contract) can enable the Marine Corps to make better predictions and take actions to retain qualified Marines and the investment they represent.

E. SUMMARY AND RECOMMENDATIONS

PCT offers valuable insights that can help improve recruitment and retention in the United States Marine Corps. PCT invites the USMC to consider how motivations (benefits) change over time. Paired with a data collection strategy that records this information in a



transparent and accessible format, the USMC can take proactive steps to meet the expectations of potential Marines and retain its most valuable assets. By incorporating a set of questions to gage the strength of the psychological contract created in the Recruiter's office during the contemplation and onboarding phases, the Marine Corps can better anticipate the needs and desires of potential Marines, predict which Marines are likely to stay and which are likely to leave. It may then implement strategies to address the root causes of retention challenges. By embracing this data-driven approach, the USMC can build a more robust, resilient, and effective force, ready to meet the challenges of the 21st century.

Rousseau (2000) developed a Psychological Contract Inventory that measures individual perceptions and beliefs about their employment relationship. "The Psychological Contract Inventory (PCI) is designed to serve two basic purposes: 1) as a psychometrically sound tool for assessing the generalizable content of the psychological contract for use in organizational research, and 2) as a self-scoring assessment to support executive and professional education" (Rousseau, 2000, pg.1). The inventory consists of several dimensions, including:

1. Role Clarity: Understanding of job duties, expectations and responsibilities
2. Fair Treatment: Belief that they will be treated fairly and equitably in their employment
3. Trust Management: Trust in the leadership to act in their best interests
4. Support for Career Development: Availability of opportunities for professional growth and development
5. Open Communication: Ability to communicate openly and effectively with superiors and peers

Rousseau issued this inventory to a sample group of participants and found that "individuals with a strong psychological contract have a more positive perception of their employment relationship, leading to increased job satisfaction, commitment, and



productivity.” On the other hand, “a weak psychological contract was associated with decreased job satisfaction, commitment, and productivity” (Rousseau, 2000). Additionally, Rousseau’s research showed that a strong psychological contract can lead to “improved organizational outcomes, such as reduced turnover and absenteeism, and increased organizational citizenship behaviors.”

The adapted Psychological Contract Inventory (PCI) for the USMC, presented in Figure 6, can be utilized at specific stages of a Marine’s career. This tool can assist Career Planners, commanders, and senior enlisted personnel in identifying potential breaches of the psychological contract.

Consider your current relationship with the United States Marine Corps. To what extent has the USMC made the following commitments or obligations to you? Please answer using the following scale:

1	2	3	4	5
Not at all	Slightly	Somewhat	Moderately	To a great extent

Part I

Role Clarity: “I have a clear understanding of job duties, expectations, and responsibilities as a United States Marine”	
Fair Treatment: “I believe that I will be treated fairly and equitably during my enlistment”	
Trust in Leadership: “I trust in the leadership of the Marine Corps to act in my best interest”	
Support for Career Development: “I have many opportunities for professional growth and development”	
Open Communication: “I have the ability to communicate openly and effectively with superiors and peers”	
Recognition and Reward: “The Marine Corps has fair and appropriate recognition for hard work and achievements”	
Work-Life Balance: “I have the ability to maintain a balance between work and personal life”	
Job Security: “I have a strong perception of job security and stability within the Marine Corps”	
Respectful Workplace: “I believe the Marine Corps has a workplace that is free from harassment, discrimination, and retaliation”	
Psychological Safety: “I feel safe and comfortable to express opinions and ideas in the workplace”	

Figure 6. Proposed Psychological Contract Inventory (PCI). Adapted from Rousseau (2023).



Issuing this inventory at each of the Decision Points Marines face would offer an opportunity for the USMC to track the degree to which it is fulfilling Marines' expectations of their careers in the Marine Corps. It may be assumed that if an individual is in the DEP, they will likely score the institution higher due to a lack of experience. Once the Marine enters the fleet and the inventory is reissued, it can also be used as a talking point particularly if the Marine changes their answers from previous inventories.

This task may seem cumbersome to Recruiters who arguably have the toughest job in the Marine Corps however, if the institution does not collect psychological contract data from the start, it will continue to miss opportunities such as knowing why people join and subsequently why they leave.



III. MARINES HAVE “JOBS-TO-BE-DONE” THAT CAN ONLY BE DELIVERED ON BY THOSE WITH “SKIN IN THE GAME”

A. INTRODUCTION

When an individual seeks out a product, service, or experience, they may have an idea of what they are searching for to complete the job that they need done by those who have the responsibility to deliver. Businesses today know more about their stakeholders than ever before due to the ability to collect information on a wide variety of demographic factors and stakeholder preferences. By collecting this information, and analyzing it properly organizations can get closer to creating products, services, or experiences that stakeholders want. Furthermore, it is imperative that an organization such as the Marine Corps, equip those who have a vested interest or “skin in the game,” the ability to deliver.

Jobs to be Done (JTBD) is a theoretical framework that was originally developed to explain customer behavior by focusing on consumers’ preferences, goals, and expectations. “Studies comparing successful and unsuccessful innovation have found that the primary discriminator was the degree to which user needs were fully understood” (Garvin, D. 2002). When humans make decisions, they rely on the idea that what they desire and communicate to the ‘seller’ is what will be delivered. This notion ties in directly with what marketers and sales persons attempt to create, which is a way to sell a product or service to an individual that is catered to what they are looking for. The Jobs to Be Done framework is applied from the perspective of the ‘seller’ and goes “beyond superficial categories to expose the functional, social, and emotional dimensions that explain why customers make the choices they do” (Christensen et al., 2016, p.54).

Understanding an individual’s Jobs to Be Done allows for organizations to align products or services with buyer’ needs. Jobs to Be Done is a framework that was developed by Harvard Business School professor Clayton Christensen and his colleagues to understand why people purchase products or services. According to the theory, people “hire” products or services to do a specific job in their lives. The theory suggests that to be successful, a product or service should be designed to help customers do a specific job more effectively and efficiently.



Even if an institution such as the Marine Corps has done their homework and understands what individuals desire from their time in the service through the benefits tag process, it does not mean that the ‘seller’ (Recruiter or Career Planner) has the resources or permissions to deliver on that product or experience. The concept of “Skin in the Game” (SITG) articulated by Nassim Nicholas Taleb, a statistician and economist known for his work on risk, probability, and decision-making under uncertainty, highlights that people who have a personal stake in the outcome of a decision or a situation (i.e., those with “skin in the game”) are more likely to act in ways that are aligned with the interests of stakeholders who share common interests.

Taleb’s concept of “skin in the game” highlights the importance of individuals having a personal stake in the outcomes of their actions, which encourages them to act responsibly and consider long-term consequences. This idea is also reflected in the Principal Agent Theory, which identifies the risks that arise when one party represents another. The Principal-Agent Theory (1976), also known as Agency Theory, was developed by Michael C. Jensen and William H. Meckling in their seminal paper, “Theory of the Firm: Managerial Behavior, Agency Costs and Ownership Structure,” which was published in the Journal of Financial Economics.

In this context, a CEO with a significant amount of company stock is more likely to make decisions that benefit the company, since the value of their stock is directly affected by the company’s success or failure. In the context of the USMC, the application of this theory reveals a problem with delivering the benefits promised in the psychological contract, particularly through the Recruiter and Career Planner communities. The lack of accountability between these communities means that not all individuals involved in recruiting and retention have “skin in the game,” potentially leading to a failure to meet the expectations set in the psychological contract.

B. CHAPTER OVERVIEW

By applying the JTBD and SITG frameworks to understand what “jobs” Marines expect will get done by choosing a career in the Marine Corps, the institution can better know how to deliver as long as it holds accountable individuals with a vested interest in



the entire Marine life-cycle. The term “job” in JTBD should not be confused with the MOS that the Marine Corps assigns its personnel. For the purpose of this chapter, “jobs” is intended to describe the function of the product or service that is offered; it is not just the task but what the task is enabling for the individual and what the individual “really seeks to accomplish in a given circumstance” (Christensen et al., 2016, p.55).

From the perspective of Jobs to Be Done, attention should be paid to which benefit tags a potential Marine selects, as these will offer clues into what job that the individual is trying to get done in his/her life. Skin in the Game focuses on the question of why, even with the right tools, the Marine Corps may continue to encounter difficulties if it does not clarify the responsible stakeholders for recruitment and retention.

The principles of these theories, applied to Marines in their first enlistment, provide a clear picture on the action that can be taken now and, in the future, if the USMC desires to retain its best and most qualified Marines.

This chapter explores the history and origins, principles, and application of the theories in order to enhance efficiencies in the benefit tag process, and finally makes recommendations on how to use these theories to better align potential and current Marines to improve enlisted retention in the USMC. It also identifies the need for clarity on who actually has SITG so that, if these theories are applied, there is a clear starting point for actionable change.

C. HISTORY AND ORIGINS

In the September 2016 Harvard Business Review article, “Know Your Customers’ Jobs to be Done,” Clayton Christensen states, “Innovation can be far more predictable—and far more profitable—if you start by identifying the jobs that customers are struggling to get done” (p.1). The theory, which provides a lens to better understand value creation, has been advanced by Christensen as well as Tony Ulwick, who has used the theory to develop insights into customer needs and develop Outcome Driven Innovation (ODI), a process his consulting company uses to get to the root of the job a person desires to get done. In this process, the consulting team asks a set of questions in order to understand a customer’s Jobs to Be Done. These steps “link a company’s value creation activities to



customer-defined performance metrics related to the job they are trying to get done” (Ulwick, 2018, p.10).

The Marine Corps can easily implement new strategies for Recruiters to get to the root of an individual’s JTBD. The difficulty isn’t just in knowing what people want, but in stipulating who actions those needs. Skin in the Game theory was formalized by Nassim Taleb in his book “Antifragile” (2012) and later in the book “Skin in the Game: Hidden Asymmetries in Daily Life” (2018) which he describes how having measurable risk when making decisions is “necessary for fairness, commercial efficiency, and risk management as well as being necessary to understand the world” (p.18). Due to the newness of the theory, Taleb has remained the largest contributor in bringing evidence of why the theory is highly applicable.

D. PRINCIPLES OF THE THEORIES

The nine principles of JTB theory are:

1. People buy products and services to get a “job” done.
 2. Jobs are functional, with emotional and social components.
 3. A Job-to-be-Done is stable over time.
 4. A Job-to-be-Done is solution agnostic.
 5. Success comes from making the “job,” rather than the product or the customer, the unit of analysis.
 6. A deep understanding of the customer’s “job” makes marketing more effective and innovation far more predictable.
 7. People want products and services that will help them get a job done better and/or more cheaply
 8. People seek out products and services that enable them to get the entire job done on a single platform
 9. Innovation becomes predictable when “needs” are defined as the metrics customers use to measure success when getting the job done.
- Ulwick (2022)

From the perspective of Jobs-to-Be-Done theory, neither the customer nor the product is the focus, rather it is the “job” the customer was trying to get done. In the case of the Marine Corps, this theory can be applied to show that every person that is considering enlistment in the Marine Corps has a “job” that they are looking to get done when they enlist in the Marine Corps, revealed by their benefit tag selections in the recruiter’s office



and again in the career planner's office. In order for the Marine Corps to understand better what job a potential Marine desires to get done by embarking on or continuing a career in the Marine Corps, it needs to "categorize, define, capture, organize and prioritize" their stakeholders' needs (Ulwick, 2019).

Nassim Taleb (2018), outlines the principles of Skin in the Game theory in four points:

1. If you don't have Skin in the Game, you shouldn't be involved
2. Time and distance remove Skin in the Game
3. Some people put more Skin in the Game than others
4. Skin in the Game is the heart of law and ethics

After identifying the needs, the principles of SITG specify how an organization like the Marine Corps can assign responsibility for retention efforts, promoting transparency. This approach aligns with Taleb's belief that "accountability is a fundamental aspect of a functional and thriving society" (2018, p. 18).

Furthermore, Taleb argues that institutions lacking "skin in the game"—such as government agencies or large financial institutions—are "susceptible to irresponsible behavior, malfeasance, and corruption" (2018, p. 18). This indicates that individuals with SITG are more likely to act responsibly and consider the long-term implications of their actions since they are directly linked to them. Awareness of individuals or groups possessing SITG promotes greater trust and cooperation within the organization.

E. APPLICATION IN THE USMC

Recruiters and Career Planners build relationships with individuals who are in different stages in the Marine life-cycle. In order for the Marine Corps to improve both its recruiting and retention efforts, this thesis advocates that the USMC collect more robust information on why Marines join and focus on delivering the benefits in the first four years of a Marine's enlistment through practices that both communities already perform.



Currently, the Marine Corps Recruiters and Career Planners go through the benefit tags process with potential Marines (pre-boarding and recruitment phase) and Marines (maintenance & development phase). For recruiters, if this information is captured, it is put on a Prospect Applicant Card (PAC) which is entered into MCRISS. For career planners, it gets entered into an open text box into TFRS. The inability to farm out the data entered into each system is touched on in the systems chapter in this thesis. Figure 7 illustrates that each prospect has chosen three benefit tags and that information is entered into MCRISS under the current process.

Date	Name	Home Telephone	Cell Telephone	Time	Location	Age	Gender	Education	Source	Activity	Non-Mates	High School	ASVAB	BT.Tag(1)	BT.Tag(2)	BT.Tag(3)	Disposition	Priority	SNC/DC Action Date	SNC/DC Note	E-Mail
13 Jan 2023	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	115/YOUSSEF	18	M	11	CAN	AC	EST70	GLENDALE HIGH SCHOOL		Technical Skills	Educational Opportunities	Financial Security, Advancement and Benefits	PAC	Cold	17 Apr 2023	✗	
06 Jan 2023	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	RSS 11S STRAH	17	M	11	CAN	AC	EST33	VERDUGO ACADEMY		Pride of Belonging	Leadership and Management Skills	Self Reliance, Self Direction, and Discipline	PAC	Cold	20 Jan 2023	✗	
27 Jan 2023	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	RSS 11M STRAH	17	M	11	US	TC	EST33	VERDUGO HILLS HIGH SCHOOL		Leadership and Management Skills	Self Reliance, Self Direction, and Discipline	Challenge	PAC	Warm		✗	NORMAN@GMAIL.C
05 Jan 2023	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	12L/YOUSSEF	20	M	12	US	TC	EST38	GLENDALE HIGH SCHOOL		Professional Development and Opportunities	Financial Security, Advancement and Benefits	Travel and Adventure	PAC	Warm	09 Jan 2023	✗	
09 Jan 2023	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	SSGT CRIST 12L RSS	19	M	12	CAN	AC	EST74	JOHN BURROUGHS HIGH SCHOOL		Leadership and Management Skills	Self Reliance, Self Direction, and Discipline	Courage, Poise, and Self Confidence	PAC	Cold	24 Jan 2023	✗	
21 Jan 2023	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	SSGT CRIST 12L RSS	22	M	12	US	TC	EST33	BURBANK HIGH SCHOOL		Courage, Poise, and Self Confidence	Physical Fitness	Challenge	PAC	Warm	30 Jan 2023	✗	
09 Jan 2023	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	RSS 12L STRAH	18	M	12	CAN	AC	EST32	VERDUGO HILLS HIGH SCHOOL		Self Reliance, Self Direction,	Courage, Poise, and Self	Technical Skills	PAC	Warm	09 Jan 2023	✗	

Figure 7. Prospect Applicant Card. Source: MCRISS (2023).

More than just entering into the system, Recruiters have the opportunity to enter additional information describing why an individual picked that specific tag. In Figure 8, more robust information is listed within that prospects' file. This information, collected during conversation with a potential Marine, may be helpful in outlining why a Marine desires to join the Marine Corps; however, after boot camp graduation this data does not transfer with the Marine and must be collected again in the Career Planner's office.



Interest
 PLANS TO ATTEND UNIVERSITY AFTER GRADUATING HIGH SCHOOL.
 S-CAREER
 W-COLLEGE BOUND
 O-EXPERIENCE/MONEY
 T-INFLUENCERS

Refer to OSO

Interview Results

Date Held	Recruiter
1/13/2023 12:00:00 PM	

Benefit Tags

1st Benefit: Technical Skills 1st Benefit Note: WANTS TO BECOME A CHIEF SO THAT HE CAN RUN HIS OWN KITCHEN. WANTS TO BE SUCCESSFUL IN LIFE AND DO WHAT HE LOVES. DOESN'T WANT TO SETTLE FOR A LOUSY JOB.	2nd Benefit: Educational Opportunities 2nd Benefit Note: HE WANTS TO ATTAIN HIS EDUCATION AND MAKE HIS PARENTS PROUD. HE FEELS THAT HAVING AN EDUCATION WILL BOOST HIS SELF CONFIDENCE.	3rd Benefit: Financial Security, Advancement and Benefits 3rd Benefit Note: HE WANTS TO MAKE ALOT OF MONEY SO THAT HE CAN GIVE BACK TO HIS FAMILY. HE WANTS TO TAKE CARE OF HIS FUTURE FAMILY AND NEVER HAVE TO WORRY ABOUT MONEY.
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Figure 8. Applicant Data Screen. Source: MCRISS (2023).

To illustrate the point, let's consider John as an example. During the benefit tag selection process, John chose "physical fitness," "educational opportunities," and "travel and adventure." His recruiter reinforced these selections by sharing personal experiences, including serving in Korea and other places like Afghanistan over a six-year career. However, the recruiter did not mention the possibility of war or the country's political situation. After seeing recruiting posters and speaking to his cousin, an infantryman, John equated serving his country with becoming an infantryman. Although the recruiter did not imply that John would experience war, he made the connection himself and believes that he must be running and gunning with the infantry to fulfill his goal of serving.

Furthermore, under current roles and responsibilities, the SSgt cannot assure that John is assigned a duty station preference, a deployment or guarantee any experience in the USMC. This means as a recruiter, he has limited skin in the game to deliver on any of those benefits.

A number of improvements could be made to enrich the data that is collected at these different touchpoints. At the same time that a potential Marine fills out a psychological contract inventory, a needs assessment could be issued to the potential Marine to understand better what 'job' joining the Marine Corps fulfills for the individual. To this end, the next section outlines the framework created by Christensen. It has been adopted for this thesis, so that it applies to the Marine Corps. This framework can help the USMC get to the root of what job a Marine is looking to get done when he or she chooses a career in the Marine Corps.



It is clear, from collecting information through a Microsoft Forms Feedback Form, issued to nine recruiters and career planners conversationally perform these steps, that Marine Recruiters and Career Planners either because of the training that they received or because of its sound logic, already. Recruiters are trained to understand and execute the tenets of “Systematic Recruiting,” the method recruiters use to recruit. By comparison, continuity in data collection and access between MCRISS and TFRS would provide multiple benefits, improving the entire ecosystem of recruitment and retention by making one seamless system. Although it will be outlined in more detail in the recommendations chapter, the needs assessment would be filled out again by the Marine upon arrival to the new unit and at least twice more before Decision Point #3; this is also when the PCI is completed.

F. NEEDS ASSESSMENT STEPS

The framework consists of five key steps:

1. Define the Customer: Identify the specific type of customer who is trying to accomplish a particular job.
2. Define the Job-to-be-Done: Identify the specific job or task that the customer is trying to accomplish, rather than focusing on the product or service itself.
3. Uncover Customer Needs: Identify the underlying needs and desires that are driving the customer to hire a particular product or service.
4. Find Segments of Opportunity: Identify customer segments with similar job requirements and needs that are not currently being met by existing products or services.
5. Define the Value Proposition: Develop a value proposition that meets the specific job requirements and needs of the target customer segment, in order to create a product or service that is more effective than existing solutions.



Recruiters rely on benefit tags to understand the underlying needs and motivations of potential Marines. These benefit tags serve as a valuable tool for recruiters to identify the Jobs-To-Be-Done. However, it was found during research for this thesis that career planners do not frequently use benefit tags in their interviews.

Given that recruitment is tied to retention and benefit tags have proven effective in recruitment, it may be beneficial for career planners to adopt the use of benefit tags in their interviews. This could help ensure that the Marine Corps is attracting and retaining quality candidates who are aligned with the Marine Corps' mission and values.

By framing the Marine Corps' benefits and messaging in terms of the Jobs-To-Be-Done, the Marine Corps can better align their recruitment efforts with the needs and motivations of potential recruits, and attract quality candidates who are committed to the Marine Corps' mission and values.

G. SKIN IN THE GAME ORGANIZATIONAL CHART

Once the needs assessment is complete and the Marine Corps is aware of an individual's JTBD, who is responsible to deliver? If it is the organization, Taleb may offer that they need to recognize their current "skin in the game" to do so. The other two communities of recruiting and retention may also not be solid candidates to deliver because of what is currently outlined in their job responsibilities. The Marine Corps needs to consider who is accountable for retention.

To better explain why Skin in the Game matters, we will take the four principles that Taleb suggests and apply them to both the communities of recruiting and retention in Table 1:



Table 1. Skin in the Game Organizational Chart for the USMC

Principle	General implication	Application to recruiting	Application to retention	Implication for organization/leadership
“If you don’t have Skin in the Game, you shouldn’t be involved.”	Individuals who will not be affected in the long term, or held accountable, should not be a part of the process	Recruiters only have SITG for a finite period (contemplation to pre-boarding and recruitment); after BC grad, SITG does not exist	Career planners have SITG for preparing a Marine for reenlistment but are not held responsible if Marines reenlist	Skin in the game is spread thin across FMF CO’s may feel pressure to make Command Retention Mission however, the CRM does not specify what the result for them is if they do not meet that mission
“Time and distance remove Skin in the Game”	If you are not close to the R&R problem, you do not feel its effects	Recruiters are dedicated when they are assigned, after, they are not responsible (system does not support responsibility)	CPs are closest to the problem but are still removed because no accountability exists, it creates distance; timeline of retainment puts the focus on FY Marines only	Leadership is far removed from the R&R problem until it affects their mission specifically; they are disabled by not having access to TFRS which would give them insight into the current state of retention in their units
“Some people put more Skin in the Game than others”	Not everyone has to care or take action and some people are more invested than others; requirements need to reflect logically who is responsible	At the time of recruiting, recruiters are the most invested in potential Marines; variability exists in a recruiters’ job commitment	CPs are most invested with the population that is eligible and in their FY to re-enlist; CPs are not required to meet a certain mission	There is an uneven responsibility (SITG) not only between recruiting and retention communities but those communities combined, create a disproportionate responsibility with entire USMC
“Skin in the Game is the heart of law and ethics”	Ideally, everyone would have equal SITG; actions that benefit you benefit all and conversely, actions that harm you, harm others	The actions of recruiters, the formation of the PC, and the lack of data collection hurt retention	The lack of accountability for CPs hurts the reputation of the MC and quality personnel suffer	The USMC should recognize the need to equalize responsibility; if recruiting is just the recruiter’s “problem” and retention is everyone’s problem, it ends up being no one’s problem



H. SUMMARY AND RECOMMENDATIONS

Jobs to Be Done and Skin in the Game are useful theories to apply to the ecosystem of recruiting and retention because they signal to the Marine Corps that Marines don't just want 'benefits' but rather they want those certain 'benefits' to be delivered on. Delivery on benefits honors the psychological contract Marines form with the Marine Corps. These frameworks focus recruitment and retention efforts on motivations for wanting to be a Marine and how those motivations are carried with them throughout their first contract. Better tracking this information will be useful in tying the recruiting and retention communities together as one. This will create a positive relationship between both parties where the USMC does not lean on recruiting to come through and make their mission but that retention will also be held accountable for attrition, creating a system that works.

To put theory into practice, my recommendation is to task recruiters to input data that includes not only which benefit tags a potential Marine chooses but data connected to the 'why' or the 'job to be done' with that benefit tag in a way that can be farmed out to analysts who are able to highlight trends across each RSS, RS and the entire enterprise. For example, if an individual chooses "travel and adventure" the recruiter will ask follow-on questions about what that means to them and why that is important to them. This may already be occurring sporadically throughout recruiting stations however, as my analysis has shown with a feedback form to recruiters, it is not a mandatory practice; MCRISS allows for recruiters to continue with the applicant profile regardless of entering a PAC. Additionally, it is recommended that every benefit tag be explored further and put on a priority list and again, put into MCRISS to be captured so that when a career planner pulls up the file on the current Marine, the conversation does not have to start fresh.



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IV. CURRENT SYSTEMS AND PROCESSES

A. INTRODUCTION

In the 38th Commandant's Planning Guidance (2020), General Berger states the intention behind Marine Corps' investments in data science, machine learning, and artificial intelligence is to harness the immense potential of each Marine, as he believes that these technologies have the "power to unleash the incredible talent of each Marine" (Berger, p. 15). He further states in the same document, "If provided the opportunity to secure additional modernization dollars in exchange for force structure, I am prepared to do so" (p. 2). The manpower modernization discussion comes at a time when it is most needed as the Marine Corps barely met its 2022 recruiting goal (Boling, 2022).

In this chapter, I present a user journey exploring the two systems that Recruiters and Career Planners use in their jobs, MCRISS and TFRS. A user journey analysis is a method of understanding how users interact with a system and generally produces recommendations for improvement, from that perspective (Zemke, 1985). Within this chapter, I will briefly identify the user groups and their goals, the user journey through both systems, identify pain points and areas of difficulty, areas for improvement and finally make recommendations for redesign or enhancements in order to connect the dots between recruiting and retention. By the end of this chapter, readers will have gained insights into both systems from these different perspectives.

B. MCRISS USER JOURNEY

Marine Corps Recruiters are the primary users of MCRISS. Marines assigned as Recruiters for three years either volunteer to do so or are or directed by the USMC at any point after they have reenlisted. They are then sent to the Basic Recruiters Course at Marine Corps Recruit Depot, San Diego to train for six weeks (MCRC, USMC, 2023). During this time, Marines from various occupational fields and personal backgrounds are trained on how to prospect and sell the Marine Corps. Prospecting involves scouring the local area for potential recruits through various methods such as cold calls, social media messaging, and high school events. The selling process, on the other hand, entails using MC3 (Marine



Corps Communication and Consulting) techniques (MCO P1130.76, 2017) which is a needs-based sales approach that uncovers the “needs” and “motivators” of potential applicants to demonstrate why joining the Marine Corps might be a desirable choice.

The Marine Corps experiences constant turnover in their recruitment force, as recruiters are reassigned and replaced on an annual basis. This presents a challenge for Marine Corps Recruiting Command, which must continually balance recruiting vacancies, new recruiters, experienced recruiters, and any other discrepancies within the recruiting system. With a typical recruiter tour lasting three years, this results in a yearly rotation of one-third of the recruitment force, leading to a loss of experienced recruiters and an increase of inexperienced ones. This is important to note because becoming well trained on the duties and obligations as a recruiter *and* excelling using a mandated system to perform those duties, takes time.

Regardless of the experience a Recruiter has, they are all required to use the data management tool, MCRISS, in order to track prospective applicants. MCRISS is not a sales tool but rather an accountability tool used to keep track of prospects at that Recruiting Station (RS) or Recruiting Sub Station (RSS). Once a poolee becomes a recruit and that recruit completes boot camp, all the information gathered in the system is archived and stored for use by MCRC.

MCRISS is currently undergoing changes for improvement and plans to roll out a MCRISS II in the future. The improved system has been a part of the discussion about systems for over four years, with one 2019 article citing how MCRISS II is “customizable” and eases recruiter’s pain point of having to be stuck at a desk as this tool can be used on a tablet or cell phone (Kelly, 2019).

Regardless of proposed improvements to the MCRISS tool, information collected on individuals will still only be available up until the point of the Marine graduating boot camp. The current system prevents new leadership from having access to the foundational reasons why a Marine joined and notes about possible goals during their career journey. If the Marine Corps desires to know more about why a Marine desired to join the Marine



Corps, and potentially add to the conversation, they will have to wait to connect the Marine to a Career Planner who can enter it into TFRS.

During this research, I was able to interview a recruiter who described the current gap in available data as well the solutions he has devised to supplement the system. Master Sergeant Ryan Lungerhausen from RS Indianapolis, has held many jobs as a recruiter; from basic recruiter to an instructor at the BRC schoolhouse and finally his job now as the Recruiting Instructor. He currently oversees more than 15 different entities (RSS, support and Officer Selection Teams). The MSgt has been serving in the capacity as a recruiter for over 13 years and has a wealth of experience and knowledge. While conducting research for this thesis, his “Benefit Tag Analysis” was incredibly relevant and applicable for establishing the importance and potential alternative uses of benefit tags (see Figure 9). With support from his Commanding Officer, the Master Sergeant uses Microsoft Excel and data that he pulls from MCRISS to create a valuable tool tracking trends about what the current pool of applicants finds beneficial about the USMC. With this analysis, he is able to show what percentage of potential Marines are interested in which benefit tags and is able to spot where his recruiters may improve on their sales on a certain benefit. This information also helps him gauge where the population is at with interest in certain benefits which as his Commanding Officer, Major Christopher Merrick puts it, “is critical to assisting our recruiters with finding the true needs and motivators of the young men and women we are interviewing” (2023).

INTERVIEWS (PRIORITY ORDER)						INTERVIEWS (TANGIBLE VS. INTANGIBLE)					
Type	1st Choice	2nd Choice	3rd Choice	Total	%	Type	BT 1	BT 2	BT 3	Total	%
TECH SKILLS	64	99	110	273	7.42%	Tangible	483	573	540	1596	43.36%
FIN. SEC	157	143	121	421	11.44%	Intangible	744	654	687	2085	56.64%
EDU	158	113	80	351	9.54%	Total	1227	1227	1227	3681	100.00%
PHY FIT	52	141	137	330	8.96%	Interviews Frequency					
TRAVEL ADVEN	52	77	92	221	6.00%	#	Tangible	Intangible			
CHALLENGE	195	100	91	386	10.49%	0	397	268			
POB	73	72	92	237	6.44%	1	492	399			
LDRSHIP	92	117	149	358	9.73%	2	399	492			
PRO DEV	90	111	113	314	8.53%	3	95	224			
COURAGE, POISE, SELF	94	104	117	315	8.56%	Total	1383	1383			
SELF X3	200	150	125	475	12.90%						
TOTAL	1227	1227	1227	3681	100.00%						

Figure 9. Benefit Tag Analysis. Source: Lungerhausen (2023).



His analysis offers several conclusions. First, benefit tags are important and need to be used in conversations with potential Marines. Secondly, this reinforces the use of benefit tags because recruiters must put the tags in MCRISS in order for the report to be created. Finally, analyzing data like this helps the greater effort by showing trends. If a recruiting station, as seen in Figure 11, has a low percentage in the “travel and adventure” benefit tag, this tells the analyst, in this case MSgt Lungerhausen, that either the recruiters are not talking enough about opportunities and the benefit of traveling in the Marine Corps or that the population of potential Marines is not as interested in travel. Either way, the data collected paints a picture that can be actioned by each recruiting sub-station.

What this analysis tells the Marine Corps and Marines serving in the capacity as Recruiters is that benefit tags matter. Examining Figure 11, we can see that there is evidence, within the scope of RS Indianapolis, has a vested interest in what benefit tags matter- and that they matter.

Supplemental analyses like the work of Master Sergeant Lungerhausen, is a “homegrown” solution to overcome current shortcomings in the MCRSS system. Individual like the MSgt has provided a solution that can be incorporated into system modifications so that Marines are able to focus on their mission instead of supplementing a system.

C. TOTAL FORCE RETENTION SYSTEM USER JOURNEY

Career Planners in the fleet and Marines assigned to Manpower Management Enlisted Assignments Branch (MMEA) are the primary users of TFRS. Outside of those two populations, access is only granted to individuals with a need-to-know status; this determination is made by MMEA. TFRS was introduced to the Marine Corps in 1998 and prior to its implementation, Career Planners used the Career Planning Management System (CPMS) to submit reenlistments and conduct interviews (ALMARS 030/98, 1998).

TFRS is a web-enabled application that provides access to multiple databases and integrates workflow and information on personnel retention requirements. The purpose of the system is to track and monitor career planning for reenlistment, extension, lateral moves, overseas extensions, and special duty assignments of personnel. This application



assists in overall recruitment goals and assignments. (SECNAV 5210.1, 2012)” TFRS has two main functions: processing reenlistment packages and conducting interviews.

TFRS, like MCRISS, is an accountability tool that is used to manage interviews, reenlistment and lateral move (RELM) packages. It provides specific announcements pertaining to Career Planners (TFRS messages), shows boat spaces and pulls certain manpower/MOS reports. Career Planners use TFRS to communicate to monitors, FTAP and STAP chiefs as well as any other personnel reviewing a submitted package. At the unit level, no other individual has access to TFRS, including the Commanding Officers and Sergeants Major.

TFRS will automatically alert a Career Planner if a Marine has an interview that is upcoming or past due. The Career Planner then notifies the Marine that they need to schedule a time to see the Career Planner to discuss how to become more competitive for reenlistment and potentially, if the time is appropriate, speak about the Marine’s plan to reenlist, laterally move to another MOS, apply for any special programs or get out of the Marine Corps; discussion about the Reserves is included in the time spent.

Individuals in their first contract have four interviews that are required according to MCO 1040.31: the “Initial,” “FTAP,” and two “EAS” interviews. If you are a Marine that has reenlisted once, you are now considered a “Careerist” and are required to have one interview during your term. According to the current Marine Corps Order, the interviews are meant to give the Career Planner an “understanding of the true reasons why Marines do or do not desire to reenlist” (p. 23, para. D, 2010). Career Planners are then charged to connect the Marine being interviewed with leaders who “possess the appropriate knowledge and awareness that can provide additional support to the Marine” (pg. 23, para. C, 2010). Figure 10 displays a career planner’s dashboard which keeps interviews organized and provides a percentage of ‘completed’ and ‘completed on time’ which is an inspectable item per the Inspector General Checklist for the Career Planning Program (MCO 1040.31, ch. 3., 2010).



HOME RELM INTERVIEWS REPORTS FORMS ACCOUNTS										
Population(245)		STAP(7)		FTAP(52)		ARAP(0)		Initial(0)		
						Careerist(0)		K7(0)		
Early (0)		Due (17)		Completed						
DATE RANGE:		Start Date: 11/19/2022		End Date: 2/17/2023		Update				
Interview Type	Completed (Early)	Completed (Due)	Completed (Overdue)	Total Complete	Missed	Total Due	% Completed On Time	% Complete		
CP Initial	0	4	1	5	0	5	80%	100%		
CP FTAP	1	47	1	49	0	49	97.96%	100%		
CP Careerist	0	11	0	11	0	11	100%	100%		
CP EAS	2	30	0	32	0	33	96.97%	96.97%		
CO EAS	0	28	2	30	0	31	90.32%	96.77%		
Total:	3	120	4	127	0	129				

Figure 10. TFRS Interview Screen. Source: TFRS (2023).

TFRS auto-populates certain fields of basic information on the interview, pulled from the Marine Corps Total Force System (MCTFS). Below the basic information, the system presents specific information a Career Planner may need to reference to know more about a Marine’s history; separate drop downs exist for extensions of enlistment, convictions, active bonus payments, weight control, formal schools, education, command information and contract information. As previously mentioned, one of the main duties that a Career Planner has is to conduct interviews. These interviews collect data on Marines that goes into a feedback loop back to a Career Planner’s Staff Non-Commissioned Officer in Charge (SNCOIC).

The following is an outline of the interviews (touch points) a Career Planner has with a Marine. It is important to note that these interviews are prescribed the MCO but vary in quality and data capturing due to Marines’ interpretation of the Marine Corps Order on retention. Significant takeaways are the time in which the interviews take place in relation to a Marine’s ECC, the purpose of the interviews and the type of data entry (mostly open text box) into TFRS.

1. Initial Interview

During the interview, executed between 26 and 24 months prior to the Marines ECC” (MCO 1040.31, 2010). the Career Planner is responsible for covering various topics



about the future of the Marine sitting in front of them and their career as it is stated in the MCO, “The topics to cover will depend on the unique interests of the Marine, the retention policies and how they affect the Marine. and career enhancing programs” (pg. 6-1, Encl 1.).

The first time the Marine Corps intervenes and makes contact in a new Marine’s career is, for four-year contract Marines, is when it is potentially halfway over. By this time, a Marine may have gained enough experience to assess if what they signed up for, with benefit tags and in the psychological contract, is what they are currently ‘getting’.

2. FTAP Interview

The FTAP interview, executed 14–12 months before the Marine’s ECC, sets conditions for a Marine starting a reenlistment package or deciding that they do not want to put in a package to be considered for reenlistment. The reenlistment process, for Marines not a part of the Commandant’s Retention Program which bypasses the twenty-step process, begins when a Marine is in their Fiscal Year (FY) to reenlist. During the FTAP interview, the Career Planner verifies that the Marine is qualified for reenlistment, reviews what computed tier (one-four) they are and reviews boatspaces (spots available) for their MOS. The Career Planner then creates a paper package with documents that need to be signed off by the Marine’s chain of command and six different entities which basically qualify them for reenlistment. In total, this requires eighteen different qualifications.

By the time a Marine meet with the Career Planner to consider reenlistment, they are already mandated to have attended a transition readiness seminar to prepare to leave the Marine Corps. The week-long seminar has a crucial influence on mentally preparing Marines to leave the Marine Corps and even helps them with building resumes and making connections with industry on potential jobs (MCO 1700.31, 2015). Figure 11 outlines the tasks that are required for Marines to separate from active duty. These tasks are mandatory per the DOD (MCO 1700.31, 2015).



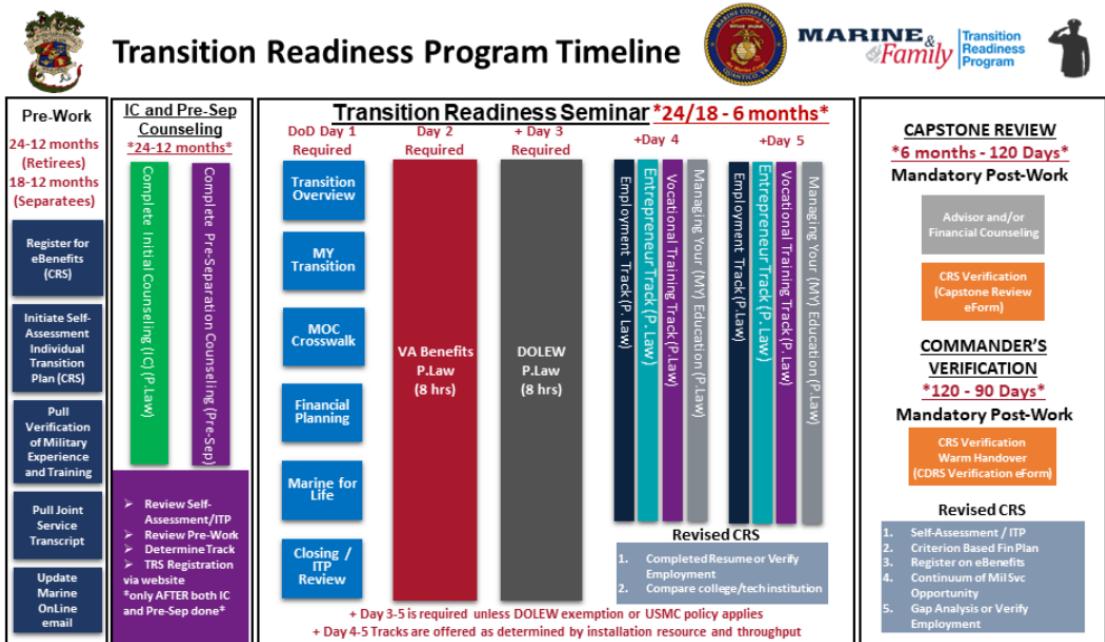


Figure 11. Transition Readiness Timeline. Source: TECOM (2023).

3. EAS Interview(s)

The last interview that a Marine has before exiting the Marine Corps, executed six months prior to a Marine's EAS, is required when they have decided to depart, is twofold: the EAS Interview with the Career Planner and the EAS Interview with the Commanding Officer of that Marine's command. For the purposes of this research, this is the most critical interview that the Marine Corps currently collects data on.

When a Marine conducts these interviews, TFRS collects information on why the Marine desires not to stay in the Marine Corps, as seen in Figures 12 and 13. These reasons do not match up with the benefit tags and the system does not allow them to pick more than one or choose them by priority. These data, if collected and analyzed, may provide a better understanding of why Marines are choosing to depart the Marine Corps however, as an example of how the systems do not connect, the fact that the information is collected only when a Marine is departing the Marine Corps does not give the institution any time to react to attempt to re-sell them the service.

***Retention Topics:**

Yes / No / N/A (Select one for each item based on the requirements of MCO 1040.31, the Inspector General Checklist, and current Policies/Procedures.)

- SNM is screened and qualified for reenlistment.
- SNM has been counseled on the appropriate retention plan (FTAP/STAP).
- SNM has been counseled and understands how to become competitive for retention. **FTAP Marine receives FTAP Evaluation Worksheet**
- SNM received informal counseling and instruction period to reinforce the regulations relating to tattoos as stated in MCBUL 1020.
- SNM is interested in submitting for a lateral move and has received guidance on how to become eligible for desired MOS. Desired MOSs are listed in the comments.
- SNM is screened and found not eligible for reenlistment. SNM has been advised on how to become reenlistment eligible.

Figure 12. TFRS Retention Topics Screen for FTAP Interview.
Source: TFRS (2023).

As mentioned previously, the Marine Corps is missing an opportunity to use the data it collects in a way that it can use to have the best chance to retain a Marine.

***Does SNM desire to reenlist:** Yes No
From the below, select the best that describes why the Marine does not desire to reenlist:

***Reason:**

***Interview Comments:**

Delete File Uploaded
Delete

Add Attachments:
Choose Files | No file chosen

(Other)
A feeling of stagnant career and/or promotion opportunities has influenced the Marine's desire to not reenlist on Active Duty.
Command climate/leadership has influenced the Marine's desire to not reenlist on Active Duty.
Continued transition has created a burden on the Marine and/or family and has influenced the Marine's desire to not reenlist on Active Duty.
Frustration with quality of individuals the Marine interacts with has influenced the Marine's desire to not reenlist on Active Duty.
High deployment tempo has influenced the Marine's desire to not reenlist on Active Duty.
Job satisfaction has influenced the Marine's desire to not reenlist on Active Duty.
Lack of control over Marine's life has influenced the Marine's desire to not reenlist on Active Duty.
Lack of fulfillment of intangible quantity has influenced the Marine's desire to not reenlist on Active Duty.
Lack of opportunity for deployments has influenced the Marine's desire to not reenlist on Active Duty.
Pay and further education opportunities have influenced the Marine's desire to not reenlist on Active Duty.
Quality of life has influenced the Marine's desire to not reenlist on Active Duty.
Treatment of junior Marines has influenced the Marine's desire to not reenlist on Active Duty.

Figure 13. TFRS Desire to Re-enlist Screen for FTAP Interview.
Source: TFRS (2023).

4. Data

Data on Marine Forces Pacific, pulled from TFRS, received from Marine Manpower Enlisted Assignments Branch, shows some notable trends in its FTAP interviews. Critical data regarding Marine's reasons for exit and entered into TFRS. The aggregated data, showing 13,206 FTAP Interviews captures information about a Marine's desire to reenlist (Figure 14).



Reason Why Marine Desires to Depart the USMC	Count of Name	Percentage
(Other)	1899	14%
A feeling of stagnant career and/or promotion opportunities has influenced the Marine's desire to not reenlist on Active Duty.	246	2%
Command climate/leadership has influenced the Marine's desire to not reenlist on Active Duty.	283	2%
Continued transition has created a burden on the Marine and/or family and has influenced the Marine's desire to not reenlist on Active Duty.	162	1%
Did not report/Blank	6175	47%
Frustration with quality of individuals the Marine interacts with has influenced the Marine's desire to not reenlist on Active Duty.	136	1%
High deployment tempo has influenced the Marine's desire to not reenlist on Active Duty.	43	0%
Job satisfaction has influenced the Marine's desire to not reenlist on Active Duty.	762	6%
Lack of control over Marine's life has influenced the Marine's desire to not reenlist on Active Duty.	335	3%
Lack of fulfillment of intangible quantity has influenced the Marine's desire to not reenlist on Active Duty.	378	3%
Lack of opportunity for deployments has influenced the Marine's desire to not reenlist on Active Duty.	44	0%
Pay and further education opportunities have influenced the Marine's desire to not reenlist on Active Duty.	2233	17%
Quality of life has influenced the Marine's desire to not reenlist on Active Duty.	469	4%
Treatment of junior Marines has influenced the Marine's desire to not reenlist on Active Duty.	41	0%
Grand Total	13206	100%

Figure 14. Summary of TFRS FTAP Interview Data

6,936 or 52.5% of Marines answered “No,” 6,142 or 46.5% of Marines answered “Yes” and 130 or .0098% of Marines did not answer when asked about their desire to reenlist. If a Marine answered “Yes” when asked about their desire to reenlist, the system does not give them the opportunity to answer what reason would make them depart the Marine Corps even if the Marine hasn’t been approved for reenlistment.

These data indicate that when Marines express an interest in reenlisting but haven’t received acceptance yet, the Marine Corps loses a valuable chance to gather information about the factors that influence their decision-making. Rather than asking why they’ve decided not to reenlist (since this group is already committed to staying), the Marine Corps could obtain useful insights by asking about the reasons that influenced their decision to remain. This can be achieved by requesting them to once again select the benefit tags they prioritize and entering it into the system to feed future initiatives and incentives.

Figure 15 proposes a way forward with a new system that changes the current ecosystem of how we manage Marine talent. The image shows tracking of benefit tags throughout a Marine’s career as well as other controls that allow for a Marine to have more autonomy in their career choices. This system will be discussed further in the next chapter.



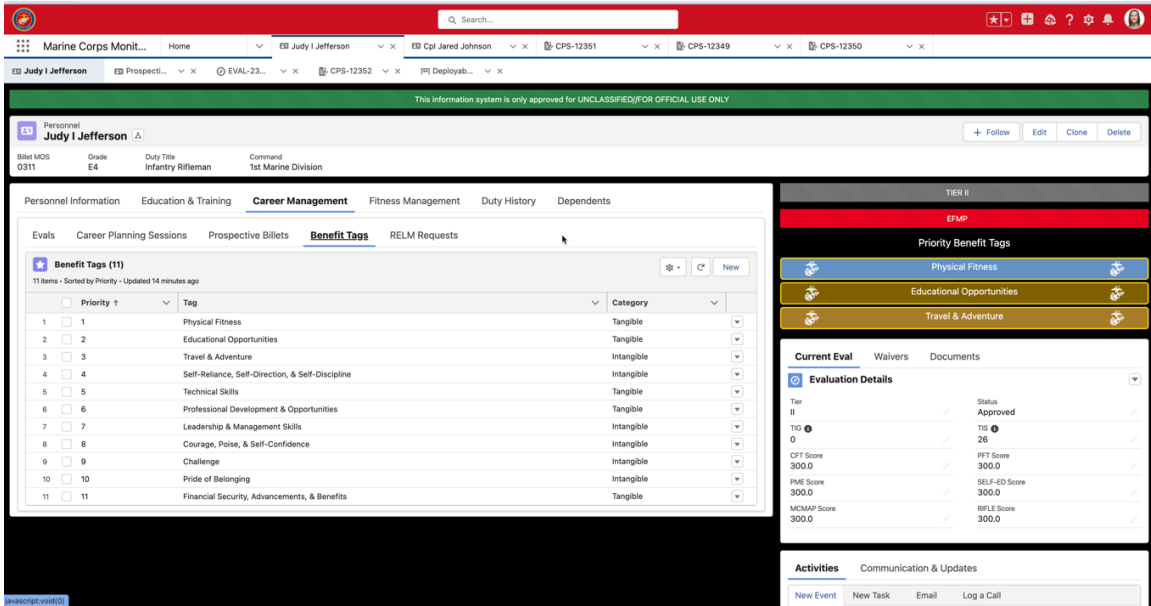


Figure 15. Proposed Prototype of System for Data Collection. Source: Salesforce (2023).



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V. OVERALL SUMMARY AND RECOMMENDATIONS

A. SUMMARY

As a decision-maker, it is crucial to recognize that while products and technologies may come and go, the need to effectively manage talent within the Marine Corps will always be paramount. In this thesis, I have conducted a comprehensive audit of the systems, communities, and user journeys currently in place, and based on my findings, have generated several recommendations for action.

Moving recruiting and retention efforts in the directions outlined below has the potential to revolutionize the way the Marine Corps manages its talent, ensuring that the needs of the Marine are considered throughout the decision-making processes. The current system utilized by both Recruiters and Career Planners is in need of updating and connecting, and it is imperative that the communities of both Recruiting and Retention collaborate to cater to the entire Marine life-cycle. Additionally, the Marine Corps must leverage the data it possesses to answer crucial questions about its people.

By taking action on these recommendations, the Marine Corps can ensure that its talent management practices are better aligned with the needs and experiences of its personnel. As a result, the Marine Corps can more effectively attract, retain, and develop the very best talent, providing a critical advantage in fulfilling its mission both today and in the future.

B. SHORT TERM RECOMMENDATIONS (ACTIONABLE NOW)

1. Recruiters and Career Planners Must Collect Benefit Tag Data to be Analyzed

In order to establish a stronger connection between recruitment and retention, the Marine Corps must prioritize data collection to better understand its personnel. The more the Marine Corps knows about its people, the better equipped it is to address their needs and motivations, which are ongoing concerns.



To achieve this goal, the Marine Corps should consider investing in a system, that streamlines the jobs of both Recruiters and Career Planners, as outlined in Chapter IV. Such a system would give Marines greater autonomy in managing their own careers while promoting transparency throughout the organization. The company Salesforce is currently working on a product that can do this for the Marine Corps as it has done for the AirForce and Navy.

As evidenced by MSgt Lungerhausen’s Benefit Tag Analysis, tracking benefit tags over time is crucial for understanding the evolving needs of Marines. For instance, a Marine who initially joined with a desire to go to school may shift their focus to “financial security and advancement” after getting married and starting a family. Tracking changes in benefit tags allows leadership and career planners to initiate important conversations and better support Marines in their evolving needs.

By investing in a more sophisticated data collection system and tracking benefit tags over time, the Marine Corps can enhance its talent management practices, improve retention rates, and better support the overall needs of its personnel. This will ultimately strengthen the organization and help it achieve its mission.

Finally, in Chapter II, I argued that in order to better understand the expectations of potential Marines, the Marine Corps should consider making use of a Psychological Contract Inventory (PCI) during the recruitment process and during interviews with Career Planners. This will provide valuable insight into what potential Marines are seeking from their enlistment and service.

By using a PCI, the Marine Corps can establish a baseline to analyze trends and identify changes that occur during a Marine’s enlistment. This information can be used to proactively address issues and renegotiate terms with Marines who may be considering leaving the Corps. By capturing this information early on, the Marine Corps will have more time to react and adjust, increasing the likelihood of retaining high-quality personnel.



2. A Marine’s Direct Chain of Command Should Have Access to Individual Marine Profiles to Better Assist in Conversations about Retention

The decision to reenlist in the Marine Corps is influenced by various factors, and it is important to consider who is responsible for recruitment and retention efforts. While it is clear who is executing recruitment duties, it is more challenging to determine accountability for retention efforts. To improve its ability to retain high-quality Marines, the Marine Corps must ensure that all Marines have access to the necessary information to have meaningful conversations about their benefit tags and career aspirations.

At present, this critical information is captured in TFRS but is only accessible by MMEA personnel. To bolster retention efforts, the Marine Corps must change this approach, making this valuable information available to all Marines, including the individual Marine who is in charge of managing their own career. Doing so will enable Marines to have more informed discussions about their career goals and aspirations, thereby increasing the likelihood that they will reenlist.

By equipping all Marines with the appropriate information and resources, the Marine Corps can enhance its retention efforts and retain high-quality personnel for longer periods. This, in turn, will help the organization achieve its mission and maintain its position as a premier military force.

3. Career Planner Interviews Need to Shift to the Left in Order to Give the Marine Corps Time to Retain

To ensure that Marines have ample opportunity to provide valuable feedback on their reenlistment decisions, I am recommending a shift in the scheduling of Career Planner interviews, as well as an increase in touchpoints with direct leadership. By implementing more frequent and transparent communication channels, we can better understand the concerns and issues facing Marines, and provide more effective counseling and support. In addition, I propose utilizing the existing TFRS system to conduct “unscheduled interviews” that allow for documentation of conversations between leadership and Marines. This proposed FTAP timeline (Figure 16) includes six interviews, each with a specific focus, and aims to improve the overall recruitment and retention process for the Marine Corps.



One main difference in the proposed timeline is that the measurement is off of the date the Marine joins; the Armed Forces Active Duty Base Date (AFADB) is a more positive term, reminding Marines when they joined not getting them focused on when they are supposed to EAS. The following interviews may be conducted by any Marine in the chain of command but must be filled out fully (guidance can be provided for this) so that the Marine Corps can get as much data as possible from each interaction:

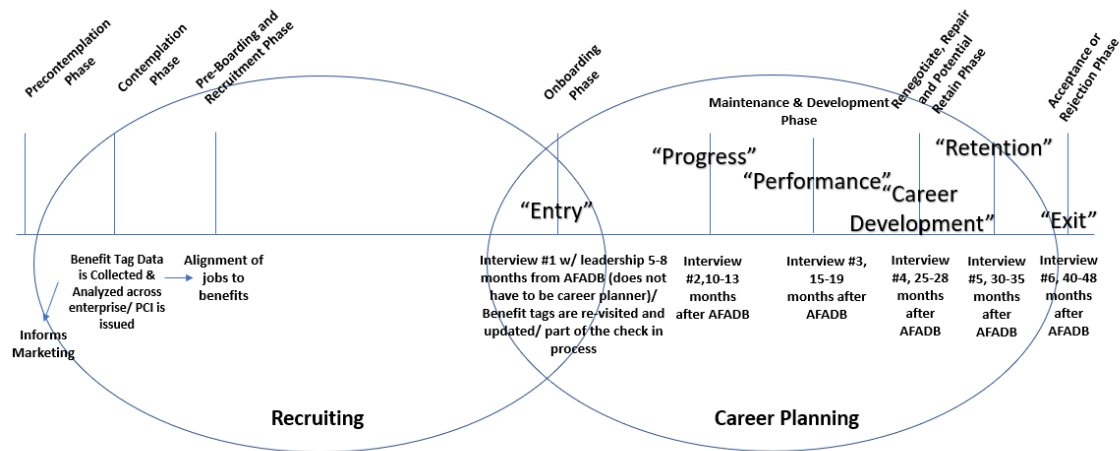


Figure 16. Proposed Timeline for FTAP Marines

Entry Interview (5-8 months from AFADB): This interview takes place when the Marine joins the USMC. Marines that have a longer training pipeline and are still in MOS school will now have a touchpoint for initial reactions to the Marine Corps.

Progress Interview (10-13 months from AFADB): This interview checks in with the Marine on how they are progressing so far in the Marine Corps. The career planner, or other leader, revisits the benefit tags and inputs data into TFRS establishing goals relating to the Marine Corps.

Performance Review (15-19 months from AFADB): This interview again, reviews the benefit tags and checks on topics reviewed in the Progress Interview.



Career Development Interview (25-28 months from AFADB): This interview discusses how they are accomplishing the personal and professional goals they set for themselves. This interview touches on reenlistment to gauge where the Marine is at with feeling about the future. This conversation centers on question “what is the long-term game for you?” This is also where a lateral move conversation would happen.

Retention Interview (30-35 months from AFADB): This is where the career planner or someone in the Marine’s chain of command discusses the options for reenlistment. This interview would be preceded with a personal questionnaire sent to the Marine about benefit tags, priorities, desires, and ultimately, how they feel about reenlisting. Then, the Marine would meet with their SNCO to finish the conversation. The choice to hit send on a package in the R&R system would be left up to the Marine.

Exit Interview (40-48 months from AFADB): This interview is for those that decide to get out of the Marine Corps. Marines in this category would fill out an extensive survey so that the Marine Corps can better understand the why. A PCI would accompany this interview in order to see if there is any correlation between the two.

4. Change the Exit Interview Criterion from Negative to Positive

While the ultimate goal is to create a single, comprehensive recruitment and retention platform for the Marine Corps, there are actionable steps that can be taken in the meantime. When a Marine is faced with the decision to reenlist and selects the “no” option, a drop-down box is provided (as mentioned in Chapter IV) to gather feedback. However, the current list of statements is often deficit-focused and fails to provide sufficient insight into the underlying reasons for a Marine’s desire to leave the Corps. As discussed in Chapter Four, over 60% of Marines responded with “other” or left the question blank. This presents an opportunity to improve data collection by creating more positive, insightful statements that encourage Marines to share their motivations for departure. By making this simple adjustment, we can gain valuable information that will aid in developing effective retention strategies for the Marine Corps. Below is a simple example of what could be done to change the negative or insufficient phrasing:



Table 2. Recommended Verbiage Change

TFRS: “Select the best as to why the Marine does not desire to reenlist” (TFRS, 2023)	Proposed Change; “I am lacking/ I need...”
“A feeling of stagnant career and/or promotion opportunities”	An environment that fosters growth and provides ample career and promotion opportunities can help individuals avoid the feeling of stagnation in their careers
Command climate/leadership	A team of leaders who prioritize the well-being of their team members and are committed to helping me achieve my personal and professional goals
Continued transition has created a burden on the Marine and/or family	Ongoing support and assistance during the transition process that can help ease any challenges that my family and I face during an important period of adjustment
Frustration with quality of individuals the Marine interacts with	Individuals who are engaging and high-quality people who inspire and challenge me to become the best version of myself
High deployment tempo	Opportunities that allow me to maintain a healthy work-life balance and thrive in a supportive and fulfilling environment
Job satisfaction	A job that fills me with a sense of purpose and satisfaction, and allows me to make a meaningful impact every day
Lack of control over Marine’s life	The ability to take charge of my life and pursue my goals with intention and purpose, free from the constraints of external control
Lack of fulfillment of intangible quantity	Opportunities that provide a sense of purpose and fulfillment that goes beyond material possessions or status, and allows me to make a positive impact in the world
Lack of opportunity for deployments	New opportunities for growth and development within the Marine Corps that allow me to expand my skills and experience
Pay and further education opportunities	New career opportunities that offer fair compensation and provide access to educational resources that allow me to continue learning and growing both professionally and personally
Quality of life	Living arrangements that provide a comfortable and positive atmosphere, which will allow me to rest well and enjoy a higher quality of life
Treatment of junior Marines	A positive and supportive environment for all Marines; a culture of respect and fairness that benefits everyone.



C. LONG TERM RECOMMENDATIONS

In addition to specific recommendations above, there are three major recommendations to consider, encompassing the full analysis presented in this thesis:

1. Marry the Systems: TFRS and MCRISS Should be One

In December of 2021, Lieutenant Colonel Matthew Halton and a team of dedicated Marines proposed a revolutionary solution to improve the Marine Corps' talent management regarding incentives. Their comprehensive research and the development of the "Jerry McGuire Portal" is specifically designed to address the desires of Marines when considering reenlistment, similar to benefit tags.

In his submission for the 2021 "Inaugural Manpower Modernization Challenge" (MARADMIN 601/21), Halton emphasized that intangible compensation can be more valuable than tangible incentives when it comes to retaining experienced, high-caliber mid-level leaders. This underscores the need to recognize and cater to Marines' intangible motivations and benefits in order to improve retention rates for those who desire to stay but are not receiving what they need.

The "Jerry McGuire Portal" offers a promising solution to this challenge by facilitating negotiations between Marines and the Marine Corps based on their desired incentives. This approach acknowledges the importance of intangible benefits and creates a platform for open communication between Marines and the Marine Corps. By leveraging this tool, the Marine Corps can better understand the needs and desires of Marines and tailor its approach to incentives and retention accordingly.

Halton's proposal to prioritize incentives aligns with my recommendation to update the current Marine Corps systems. Ultimately, the focus must be on the individual Marine, which is impossible to achieve with the current (and separate) MCRISS and TFRS systems in place.

2. If the Systems Connect, So Should the Communities

The idea of merging the recruiting and retention communities raises an important question: are recruiting and retention essentially the same thing, or are they separate but



complementary activities? How does the Marine Corps view and resource them? According to the Marine Corps' Enlisted Retention order, the two primary enlisted career force objectives are to provide the Marine Corps with the most qualified force by grade and MOS, and to standardize promotion tempo across all MOSs to match time-in-service targets. Both recruiters and Career Planners are trained under the Marine Corps Recruiters School, which is responsible for the procurement and retention of enlisted Marines for both the regular and reserve establishments.

However, there is a missed opportunity for alignment between the two HQMC agencies, M&RA and MCRC, which occupy the same building and compete for resources independently. To address this, I recommend returning Marine Corps Recruiting Command to the Deputy Commandant, Manpower & Reserve Affairs, and moving internal recruiting elements of Manpower Management into MCRC. By establishing an internal division within MCRC, the Marine Corps can take advantage of well-developed programs and philosophies for external recruitment and use them for internal recruiting efforts. This structural change better aligns Total Force activities from recruitment to retirement, as Career Planners have to re-sell the Marine Corps to those who have already served.

Integrating the recruiting and retention communities also helps address the issue of accountability, as previously mentioned in this thesis. If the Marine Corps designates recruiters as responsible for recruiting but neglects to hold anyone accountable for retention, how can it determine the effectiveness of its practices? Bringing together these two efforts allows for a comprehensive approach to recruitment and retention, with a focus on the individual Marine.

3. If Great Communities Connect, They Need a Great Consultant

In today's workplace, Industrial/Organizational psychology is increasingly becoming a necessity, particularly in the military where the United States faces numerous global threats and a need for perspective is present. As the stakes are high, having the right individuals in the right roles with the appropriate skill sets is critical for mission success and can have a direct impact on servicemember's quality of life. Industrial/Organizational psychologists play a vital role in the recruitment, selection, and placement of the most



qualified Marines. They use research, experimentation, counseling, and advice to provide valuable resources to the military in identifying and developing personnel who possess the necessary skills and characteristics to fulfill specific roles effectively.

If the Marine Corps desires to manage its people in a way that makes its force more lethal and ready for what conflict is to come, it must change the way it sees the people who serve in the institution. The saying “mission first, people always” cannot be true if the Marine Corps forgets about the very people that execute that mission. In order to do this, the Marine Corps should consider investing in organizational psychologist who is someone who can lead the charge on the most wicked and difficult to solve “people problems.” The Navy has invested in a research organizational psychologist to consult on promotion boards, certain leadership positions and as a general consultant for manpower decisions. Rear Admiral (Lower Half) Michael Schwerin is currently serving his 28th year in the Navy and his job description presently is that of a valued consultant to the Navy’s toughest (familiar to the USMC) problems with personnel. He leads research and studies for evidence-based decision support and has extensive experience in organizational behavior, employee retention, customer experience, user experience, survey research, multivariate statistics, focus group interview and the list goes on. The Marine Corps needs a RDML Schwerin.

Empirical evidence has demonstrated the critical role psychology can play in enhancing recruitment, retention, and overall performance within the Marine Corps. Through effective psychological screening and testing, recruiters can identify candidates best suited for military life, reducing the risk of attrition and improving overall performance. Psychology can also enhance training, leadership, and teamwork, which are all critical to the success of military operations.

Incorporating a Uniformed Industrial and Organizational psychology into the Marine Corps personnel management practices can provide a comprehensive approach to addressing the unique challenges and stressors of military life. Industrial and Organizational psychologists are trained to assess organizational structures, culture, and individual behavior to develop evidence-based solutions that enhance performance, improve job satisfaction, and promote well-being. Industrial and Organizational



psychologists can provide valuable insights and recommendations on recruitment and retention strategies, training programs, and leadership development to create a more effective, resilient, and cohesive organization. Lead by an I/O Psychologist, my recommendation is to stand up a Marine Analytics Department (MAD) in order to understand more about our Marines and their decision-making.

MAD would focus on utilizing data and analytics to inform talent management decisions and drive improvements in workforce performance, efficiency, and effectiveness. The department would be staffed with highly skilled data analysts, statisticians, and Industrial/Organizational psychologists who possess specialized knowledge of talent management and military personnel systems.

The department would consist of several sub-units, including:

Data collection and management: This unit would be responsible for collecting and managing all personnel data across the Marine Corps. They would ensure data accuracy, completeness, and timeliness while adhering to strict privacy and security protocols.

Workforce analytics: This unit would focus on analyzing personnel data to identify patterns and trends related to recruitment, retention, workforce diversity, skills gaps, and other factors that impact talent management in the Marine Corps. They would use various statistical techniques and predictive modeling to develop insights that inform talent management decisions and policies.

Performance analytics: This unit would analyze performance data, including individual performance evaluations, unit readiness assessments, and training records, to identify factors that impact workforce performance and effectiveness. They would use this data to develop insights and recommendations for improving training programs, job assignments, and other factors that impact performance.

Organizational development: This unit would focus on identifying and addressing issues related to organizational structure, culture, and behavior that impact talent management and workforce effectiveness. They would use various methods, such as surveys and focus groups, to gather data and develop insights that inform organizational development strategies.



Strategic workforce planning: This unit would use data and analytics to develop long-term workforce plans that align with the Marine Corps' mission, vision, and strategic goals. They would analyze demographic, economic, and technological trends to identify future talent needs and develop strategies to meet those needs.

Overall, the MAD would be a critical component of talent management, providing valuable insights and recommendations that help to improve recruitment, retention, workforce performance, and organizational effectiveness.



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VI. REIMAGINING RECRUITMENT AND RETENTION THROUGH THE CASE OF JOHN

By adopting a human-centered approach to recruitment and retention, it may be possible to improve the chances of retaining Marines like John from Chapter 1. Looking back at John's story, it becomes apparent that more effective management of his expectations, as well as those of the Marine Corps, could have made a significant difference. Through the application of best practices outlined in this thesis, we can reimagine John's enlistment and increase his likelihood of remaining in service. Let's explore how John's story could unfold with these improvements.

John is at the contemplation phase and has reached out to SSgt Booth on the phone to inquire further about joining the Marine Corps. After setting up an appointment, John walks in the office, painted with a blood stripe and pull up bar in the middle, he is confident that if he joins it will be the right choice and his desires to go to school, stay physically fit and travelling will be fulfilled like the SSgt said they would.

SSgt Booth then takes John's information and builds his Electronic Prospect Applicant Card, now with all the benefit tags listed and one sentence for each tag explaining why it was placed where it was when John selected them. An analysis is performed with the Benefit Tag Analysis tool, in the Recruitment and Retention System (R&RS) to show which benefits that RSS has; John has picked a fairly popular combination according to the analysis. SSgt Booth now knowing where John's needs and motivations are, was able to dig into how John would be able to achieve each one. He talked about Tuition Assistance and how an education center is on most bases in the Marine Corps. He talked about the Marine Corps' Force Fitness program and how he could get certified to teach others how to take care of their bodies with fitness. Lastly, the SSgt was able to see in the R&R system that there were vacancies for a specific MOS that John wanted so the likelihood was higher that he would get that when he went to MEPS; physically seeing on the screen that the potential was high, made him feel secure.

John went through the Pre-boarding and Recruitment Phase to the Onboarding phase where he was approached by a career planner during the last week of SOI. The career



planner, Sgt Bees conducted an initial interview with him where she asked him about his time in the Marine Corps thus far. The career planner also issued him a Psychological Contract Inventory to see if he was still satisfied with his decision to become a Marine. Sgt Bees finally asked Pvt Coolidge if his benefit tags were still “Travel and Adventure,” “Physical fitness,” and “Educational Opportunities.” John confirmed they remained the same.

When Pvt Coolidge checked into his new unit at Camp Pendleton, he was instructed to see the career planner on his check in sheet. When he got to the career planner’s office, he scheduled a time to conduct the “Progress Interview.” This is where the Marine sets goals with the career planner and is mentored personally and professionally about what he can do to stay competitive; reenlistment is not brought up in this conversation as it is purely about how Pvt Coolidge can make progress in his career. The career planner easily pulled up his record on the R&R system and can see Pvt Coolidge’s progress in the DEP; he was a high potential Marine that thrived off of autonomy. The career planner connected Pvt Coolidge to a brand-new Marine in the unit who had similar fitness goals as him.

Five months later, Pvt Coolidge gets an automated email sent to him on his personal email address as well on his Marine email that alerts him that he is due for a “Progress Interview.” He is able to set an appointment virtually from the email prompt. At this point, PFC Coolidge has gone on two field operations and shot at a live fire range. He reports to the career planner for his interview and the conversation centers around performance. The career planner pulls up the PFC’s record to show how competitive he is in his MOS and in the entire Marine Corps, based off the AFADB. John sees that he can improve on his MCMAP belt level and agrees that it is something he will pursue soon.

SSgt Barkley, LCpl Coolidge’s platoon Sergeant, calls him into his office to talk about his fourth interview that is due. LCpl Coolidge realizes that he hadn’t checked his email in some time. The SSgt decides that he wants to be the one to counsel LCpl Coolidge on this interview because of the rapport they have already built. As SSgt Barkley logs into the R&R system and pulls up the “Career Development” interview, he digs right in.



“LCpl Coolidge, you’re about halfway through your first enlistment, are your priorities and benefit tags still the same or have they changed?”

“SSgt, I feel that at this point, the Marine Corps sent me to Camp Pendleton and for me, that is plenty travel and adventure. As far as the physical fitness goes, I think I am where I need to be personally and professionally. My last tag, “Educational Opportunities” is the only one that I haven’t been able to achieve. We are just so busy all of the time.”

SSgt Barkely replies, “two out of three, so far, that is pretty good for only being in the Marine Corps for 27 months from when you joined. I can help you with the education opportunity and link you up with an advisor. Let me put some info in this system so we can give some feedback to the Marine Corps and then let’s get back to work.”

“Sounds good, SSgt.”

At the 34-month mark from LCpl Coolidge’s AFADB, he is due for a fifth interview. This one is where he has to sign onto the R&R system to fill out a few questionnaire’s about his time in the Marine Corps. The system automatically generates a reenlistment package for him and asks LCpl Coolidge if he desires to reenlist for another four years. LCpl Coolidge selects “yes” and the R&R system asks him what his top reasons were for wanting to stay a Marine. In addition, it informs him about bonuses and potential duty stations for his next tour. LCpl Coolidge isn’t sure what he should do and as he is sitting in the company office a bit confused, the Battalion Adjutant walks by.

“Hey Marine, what are you working on over there?” Major Hastings asks.

“Ma’am, I am trying to make sure I understand what the R&R system is telling me.”

“Oh, this thing is so cool. I was just briefed on it a few weeks ago. Let’s take a peek.” Maj Hastings plops next to the LCpl and they both look at the screen.

“It looks like I rate to become a Force Fitness Instructor (FFI), a preferred duty station or six weeks at a trade school. That can’t be right.”

“Look at your benefit tags, Coolidge. You picked ‘Travel and Adventure,’ ‘Education Opportunities,’ and ‘Physical Fitness.’ That sure makes sense to me!”



LCpl Coolidge decides to select the FFI incentive and his package starts to route.

As his package is routed electronically to those entities who must review it, LCpl Coolidge doesn't have to waste anytime walking around with a paper package for signatures- he is free to go back to do the job he has grown to love as an infantryman.

LCpl Coolidge gets an alert on his phone that tells him his package has been approved for reenlistment and the FFI incentive and LCpl Coolidge is ecstatic that he is able to easily and seamlessly continue serving in the USMC for another four years.



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