People Data as a Business Accelerant: Voice of the Workforce

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INTRODUCTIONS

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About Visier

Visier’s purpose is to help people see the truth and create a better future - now.

**Visier was founded to focus on what matters to business people, answering:**

- The right questions, even ones a person might not know to ask.
- Questions that shape business strategy, provide the impetus for taking action, and drive better business results.

Visier delivers fast, clear people insights by using all the available data - regardless of source.

With best practice expertise built-in, decision-makers can confidently take action. Thanks to our amazing customers, Visier is the market leader in Workforce Analytics with over 8,000 customers in 75 countries around the world.
Who We Are

At Leapgen, we are transformation evangelists.

Our core belief is that workforce technology should make work smarter, not get in the way. We know employees expect the same frictionless, personalized experiences inside work they have outside of work. We help organizations move beyond simple technology implementation to true deployment of digital capabilities. This is how we change the way the world works.

Companies that leverage Leapgen’s services and expertise are well-positioned to:

➔ Execute vision for people function
➔ Align people function to business
➔ Design HR for the workforce, not for HR
➔ Deploy a digital mindset and skills to accelerate the business

Leapgen is a digital transformation company shaping the NOW of work.
WHAT WE (YOU) DO

STRATEGY

DEPLOYMENT

ROI
RUN, OPTIMIZE, INNOVATE
2021 DIGITAL EQUATION FOR SUCCESS

- **Purpose**
- **Mindset/Vision**: 35%
- **Person/Audience**: 30%
- **Journey/Process**: 25%
- **Solution/Technology**: 10%

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Learning Goals

➔ Define Digital Workforce Experience
➔ How to leverage data about your people as an input for
  ◆ EMPATHY
  ◆ Experience Design
  ◆ Personalization
  ◆ Continuous Improvement
POLL #1

How is your organization using data to **HUMANIZE** Workforce Experience today?

A. We capture all kinds of data and apply it to make experiences better on a regular basis
B. We are just starting to capture and analyze data, but nothing is operational yet
C. Not at all - tell me how!
HUMANS + TECHNOLOGY = DIGITAL
DIGITAL is ability to deliver personalized experiences at scale

Data is the single most important ingredient that enables us to design a relevant and personal experience in the workplace.
We know more about a company laptop than we do about our top talent.
Data for **Experience Design**
BUILDING PERSONAS TO UNDERSTAND THE WHOLE PERSON

Benefits of Personas

1. Provide deep understanding of entire workforce
2. Encourage empathy-driven design
3. Define digestible workforce segments
4. Uncover workforce needs & common frustrations
5. Test, refine & improve experiences
6. Anticipate future opportunities
**Nia - Upward and Onward**

The “upward and onward” employee views career growth and development as a way to climb higher in the organization. These employees could be in an individual contributors role or in a people leader role. Many of them have already had one or two career moves since joining the company. These employees are often times actively looking for career advancement.

**Voices**

- "I feel like I have to take control of my own training and development."
- "Managers are not taking an active role to support or encourage this."
- "I really miss a clear development program for myself throughout mainly the last 2 years, having 4 different managers. I think that it is not fair when I am committed to our values."

**Goals**

- I'm hoping to be in a more senior role in the next 12 months.
- I need to actively grow and develop in this role to prove my readiness for the next step.

**Frustrations**

- **Scarcity** - It feels like there are not a lot of open roles for me to move into.
- **Searching** - It is tough finding resources that I need to help get me ready for my next move.
- **Support** - Some managers are really good at fostering growth and development, others are not.

**Needs**

- **Clarity** - A clear and actionable path forward in my career.
- **Consistency** - A way to overcome the disruptions with manager turnover.
- **Tools** - Resources to help keep me focused on the right activities.

<table>
<thead>
<tr>
<th>Insights</th>
<th>My Barriers</th>
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<tbody>
<tr>
<td>54% of those surveyed develop a skill to be in a better spot for a promotion</td>
<td>Lack of Time</td>
</tr>
<tr>
<td>46% do not feel like there are enough development programs</td>
<td>Reorganizations</td>
</tr>
<tr>
<td>24% feel like they are rewarded for engaging in growth and develop activities</td>
<td>Policies</td>
</tr>
</tbody>
</table>

**Key Principles**

- GUIDED
- INCLUSIVE
WHO WE HEARD FROM

57* LISTENING SESSION PARTICIPANTS

49 Prod/Prof EEs
ICs & Managers

8 HRBPs/HRSC EEs
ICs & Managers

*XX IT EEs
ICs & Managers

238 SURVEY PARTICIPANTS

AT HOME 44%
IN THE OFFICE 15%
IN THE PLANT 27%
IN THE FIELD 14%

22% SALES
39% PRODUCTION
39% CORPORATE

40% MANAGERS
60% INDIVIDUAL CONTRIBUTORS
Moving From Population Segments to Personas

- Population Segment Selection
- Focus Group & Survey Participants
- Personas

Provides parameters for who to talk to

Data collected guides persona creation
The Story is a short explanation of who Hannah is, what she does, and what her main focus is. This section provides more context about what Hannah cares about. **We use this to understand how our future designs will fit into her larger work experience.** It can also help us understand how to attract, motivate, engage, and develop Hannah throughout her career.

**Giving the personas a Name** allows us to create a persona that feels like a real person. With a name and photo, the persona comes to life!

**Quotes** are often compelling quotes (usually not direct quotes, but paraphrased) that summarize what Hannah's immediate need or perspective is. **Quotes give us insight into Hannah's overall attitude of her digital experience at work.**

**Steps I Take to Find HR Info** outline the steps Hannah takes when she has an HR related questions or issue. This gives us insight into how Hannah interacts with HR & helps us understand what people and technology support her.

**How I Adapt to Change & Learn** includes how Hannah adapts to change and learns best. This gives better clarity on how she needs to be approached during teachable moments.

**Fast Facts** provide interesting statistics or information gathered during the survey (or listening sessions) that give us deeper insight into who Hannah is and what her needs are.

**Needs & Frustrations** give insight into what Hannah needs to accomplish her goals. It allows us to see what might be preventing her from accomplishing those goals today. **We want to know how to improve the digital experience for Hannah, so outlining her needs and frustrations helps us design solutions that will meet her needs & minimize (or, ideally, eliminate) those frustrations.**

**HR Info I Want to Access** outlines the HR information that is most important for Hannah to have easy access to online. When designing digital solutions, it's important to know the key information to include on the portal.

**Communicate with me** includes the communication channels that work best for the personas. This helps inform the delivery methods for communication.

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Hey there, I'm Hannah. I started at Land O'Lakes 3 months ago and so far LOVE it - my team is so supportive and really celebrates the wins. I'm a little lost about who to reach out to though - there are so many people helping me which is nice but I just wish there was one point of contact. During my onboarding, the “this is your HR contact” field was blank, so I just go to my manager. She shouldn't have to help me with all the little personal stuff though - I want to be able to take care of that on my own.

**NEEDS & EXPECTATIONS**
- **Information** - know who to go to for what, and be able to find personal information on my own
- **One Stop Shop** - common source of updated information
- **Communication** - responsiveness and quick resolution from HR & IT

**ROADBLOCKS & FRUSTRATIONS**
- **System Integration** - Too many systems and lack of integrations
- **Resolution** - long resolution time & passed around to many people before getting an answer
- **Information** - getting a lot of information, but not necessarily informed

**STEPS I TAKE TO FIND INFORMATION**
1. **THE SOURCE**
2. **MANAGER/COWORKER VIA TECHNOLOGY**
3. **MANAGER/COWORKER IN PERSON**

**HOW I ADAPT TO CHANGE & LEARN**
- **SMALL GROUPS**
- **CHANGE AGENTS**
- **DEGREED VIDEOS**

“**My onboarding was a mess! I wish I had someone to reach out to but I didn’t know anyone besides my manager”**
PETER

CommUNICATE WITH ME

EMAIL
MANAGER
CHAT

HR INFO I WANT TO ACCESS ONLINE

TIME & ATTENDANCE
BENEFITS
BASIC COMPANY INFO

“i feel like i’m on an island...the only connection back to the company is through my manager”

STEPS I TAKE TO FIND INFORMATION

1. THE SOURCE
2. MANAGER/CO-WORKER VIA TECHNOLOGY
3. EMAIL HR/HRSC

How I adapt to change & learn

TRANSITION PLAN
UNDERSTAND THE “WHY?”
ONLINE VIDEOS

My Story
Hey, I’m Peter. I’ve been at Land O’Lakes for 11 years. Sometimes it’s hard being in my car all day but I’m driven by uncovering new opportunities for the business. I usually start my day checking email, but I get so many emails that things tend to get lost, so I just trust my manager is telling me what I need to know. I’m out in the field all day, so I don’t get to check my HR info during the workday like the folks at corporate. We have to do things differently, but not sure if the company sees that.

Needs & expectations

- Tell me what I need to know - relies on manager to communicate the important information
- Consolidated & Reliable Info - make it clear what info is up to date (no guessing)
- Field First Mentality - the company needs to have an understanding of what occurs remotely/in-field ee’s

Roadblocks & frustrations

- Disconnect with HR - very limited opportunities to connect with HR; there is a lack of understanding around our needs & what occurs on the field
- Too many systems - the number of systems and emails that are out there are time-consuming & confusing
- Communication - it is difficult to communicate with IT due to the language barrier

Fast Facts

When asked what they would change if they had a magic wand,

5 Out of 9
Responded with a desire for a more user friendly operating system & suggested updating or removing JDE

57%
Of Field Managers say an Org Chart is the most important piece of information to access online
DOING FOR MYSELF - IN THE PLANT

JOE

COMMUNICATE WITH ME

EMAIL
BULLETIN BOARDS
MANAGER

INFORMATION I CARE ABOUT

TIME & ATTENDANCE
BENEFITS
BASIC COMPANY INFO

MY STORY

Hi, I'm Joe and I've been at a Land O'Lakes plant for 9 years. Although it can be hectic at times, overall I enjoy working here; the culture makes me feel like I'm part of a family and I'm proud when I see farmers using our products. The pay and benefits are important to me; I just wish I understood it better and the information was easier to find. My managers have been helpful when I have questions, but they don't always know where to go either.

NEEDS & EXPECTATIONS

- **Accessible** - availability of tools, support outside of "core" hours, emails/communication in native language
- **Personalized** - find information pertinent to me (e.g. plants near me), HRBP get to know me
- **Mobile** - plant-wide app to communicate updates/issues (between teams & across shifts) in a busy/loud environment
- **Short Staffed** - a lot is expected of our teams
- **Equipment** - old equipment, significant downtime
- **IT Support** - difficult to understand, slow response which impacts production (e.g. scan guns)

ROADBLOCKS & FRUSTRATIONS

FEEL SUPPORTED & INFORMED
during change

56%

FAST FACTS

56%

56% 
Feel Supported & Informed during change

47%

Prefer to use a mobile device to consume HR and general information

HANDS-ON LEARNING
RECORDED TRAINING

MANAGER SUPPORT

“it’s great to have the technology, but to get anything out of it, you have to be an expert.”

STEPS I TAKE TO FIND INFORMATION

1. ASK MANAGER/ COWORKER IN PERSON
2. ASK MANAGER/ COWORKER THROUGH TECH
3. CALL HR OR HRSC

HOW I ADAPT TO CHANGE
DOING FOR MY TEAM - PROFESSIONAL MANAGERS

SUZANNE

COMMUNICATE WITH ME

EMAIL

THE SOURCE

MANAGER

HR INFO I WANT TO ACCESS ONLINE

TIME & ATTENDANCE

BENEFITS

PAY INFO

MY STORY

Hi, I'm Suzanne and I work in Finance at Land O'Lakes. I've been here for about 6 years and enjoy what I do. I've worked at a few other companies during my career, and really appreciate the collaboration and relationships I've built here. We use a lot of different technologies/systems for our work and sometimes it's difficult to find what I need or keep up-to-date on everything happening at the company and resources available.

NEEDS & EXPECTATIONS

- **HRBP Connection** - understand who my HRBP is & receive regular updates
- **Customized** - allow filtering features to see info relevant to me (e.g. calendar), more SSO
- **Communication** - provide awareness of different channels available & expected time for response/resolution

ROADBLOCKS & FRUSTRATIONS

- **Searching** - Separate systems make it difficult to find info, Workday is "clunky" to use
- **Outdated information** - content owners aren't updating on a regular basis
- **Slow response** - difficult to get a timely response from HR & IT

STEPS I TAKE TO FIND HR INFORMATION

1. **THE SOURCE**
2. **HR PORTAL**
3. **EMAIL HR OR HRSC**

HOW I ADAPT TO CHANGE & LEARN

- **UNDERSTAND THE “WHY?”**
- **MULTIPLE CHANNELS**
- **RECORDED VIDEOS**

“"The company provides a lot of information, but it's difficult to find and I'm not confident it's up-to-date."
DATA INPUTS FOR EXPERIENCE DESIGN

Experience Data
- Voice of the Customer
- Behavioral

Organizational & Operational Data
- Process & System Data
- Demographic & Indicative Data
A Great Process isn’t enough to create an ENGAGING Journey.
UNDERSTANDING THE EXPERIENCE

Transaction + Interaction = Experience
Any of these actions can contribute to a better employee experience

- **Onboarding**
  Set the tone with a great first day for new hires.

- **Enable work**
  Provide the tools and software necessary

- **Improve the space**
  Allow movement, provide space for focus, etc.

- **Target inclusion**
  Ensure people feel like they’re included in the mission

- **Connect employees**
  Provide tools for employees to connect.

- **Update benefits**
  Offer the benefits that employees value

- **Career development**
  Make it easy to plan and develop your career

- **Train managers**
  Make sure your managers add to the experience
**Scenario**

Hi I’m Grace, and I am excited to start my new job! I am bringing a wealth of knowledge to the team, and I am look forward to contributing and proving value right away. This is not my first job, but it my first position at a larger organization. I can’t wait to see what career opportunities are available!

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**Offer Acceptance - Day Before Start**

- **My manager reaches out to me**
- **Get an email to-do list**
- **Receive my technology**
- **Have trouble setting up my technology**
- **Sit on the line with the Help Desk**
- **I received a few emails with conflicting information which is a little confusing, I hope I don’t miss something.**
- **It was great to hear from my manager; communication has been pretty good!**
- **Thank goodness all my tech showed up early, I can get a head start for Monday - first impressions are important.**
- **So much for a head start... guess I will call the help desk. This is taking up some of my time.**

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**First Week**

- **Connect with my manager**
- **Meet with my team**
- **Finish the setup process**
- **Waiting for my online training to be assigned**
- **Learn how to order supplies, equipment, and access**
- **I’m still having some network issues with my laptop, preventing me from making the impact I wanted.**
- **My manager is really awesome and this relationship is one of the most important in my work life! I’m happy I made this choice.**
- **While my team is great, I can tell that they are all really busy and I am a little worried about how I will learn my job.**
- **I wonder how I get a second monitor like others. Do I buy my own? I could be more productive if I had this stuff from day one.**

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**Second Week - Fourth Week**

- **Try to connect with my team**
- **Complete my training**
- **Touch base with my manager**
- **Receive my welcome gift**
- **Uncover development resources**
- **It is hard to connect with the team; I can figure this job out; I got this.**
- **Thank goodness my manager checks in on me! I would like to talk about expectations and some career topics soon, though.**
- **Ohhh, a welcome to the team gift. :/ A little late, but we’ll chalk it up to 2020?**
- **I am grateful for this job, but I would have expected a better, more composed onboarding experience from such a large organization.**

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**Journey Roadblocks**

- Lack of prior experience being onboarded in a virtual-only manner
- Limited or no access to core systems prior to day one
- Busy manager and team

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**My Ideas**

- Checklist that covers required actions, technology, and contacts
- Orientations sessions done as a cohort so I can interact with others
AUDIENCE DISCUSSION: YOUR SCENARIO HERE

Scenario

My Activities

My Sentiments

Offer Acceptance - Day Before Start
First Week
Second Week - Fourth Week

Journey Roadblocks

My Ideas
Data for **Personalization**
DATA INPUTS FOR PERSONALIZATION

Organizational & Operational Data

Demographic & Indicative Data
Sara has started her maternity leave and will need to attain benefits for her new dependent effective June 7th.

The team has backfilled her position and now HR is preparing to congratulate her on the new addition to her family, provide additional information about what her time on leave will be like and returning to work to make her transition back seamless.

Sara’s manager has confirmed that she had a healthy birth.

Sara, a mid-level manager in Finance had a baby on June 7th and will be out on maternity leave for the next 12 weeks.

Sara had a baby.
Data for Continuous Improvement
PET vs ROCK
A static model (tools, design, processes, etc.) will enable improvement to a point, but **going beyond that requires a change in the model.**
### REAL LIFE EXAMPLES

<table>
<thead>
<tr>
<th>Data Input</th>
<th>Potential Insight</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spike in calls about performance management processing.</td>
<td>Associates are confused about the new performance management framework and how to apply to process.</td>
<td>The Talent team adds some clarifying language to the talent site in the HR Service Layer.</td>
</tr>
<tr>
<td>One of the top three search queries is also a high volume call topic.</td>
<td>Associates are searching for answers online and calling MyHR when they can't find the answers they are looking for.</td>
<td>Supporting the search with accessible knowledge content enables users to find what they need for without having to call.</td>
</tr>
<tr>
<td>Individual associates are opening multiple cases in a short timeframe.</td>
<td>Agents were not aware of a downstream impact of the issue and therefore were only solving half of the problem for the associate the first time they called.</td>
<td>Updating the internal knowledge base to provide agents with the full context to solve the associate's inquiry.</td>
</tr>
<tr>
<td>Workday system analytics show a bottleneck in the onboarding process.</td>
<td>Managers are not completing the “New Hire Welcome” task which is delaying the entire onboarding process by 24-48 hours.</td>
<td>Assign manager notification but remove manager step.</td>
</tr>
</tbody>
</table>
CONTINUOUS IMPROVEMENT

Maturity

Don't collect the data we need

Data is collected but not analyzed

Data is analyzed but not applied

Data is applied to drive enhancements (people, process & tech)

Channels for Data to Drive Continuous Improvement:
Case, Knowledge Base, Portal, HR Systems of Transactions, Workforce Experience Design
Apply the Ask, Align, and Act framework

**Ask**
Take time to identify the right question so that you focus your efforts on real issues

**Align**
Align your findings with what is being observed by practitioners

**Act**
Determine actions designed to mitigate the issues your found and monitor results regularly
DATA FOR EMPATHY

Experience Data

Voice of the Customer and Behavior Data

Organizational & Operational Data

System Data

Workforce Experience

Workforce Engagement & Solution Adoption

Workforce Insights

Continuous Improvement

Experience Design

Personas & Journeys
Synthesis of data to drive experience design and improvements

Personalization

Indicative & Demographic Data

Experience Design

Personas & Journeys
Synthesis of data to drive experience design and improvements

Personalization

Indicative & Demographic Data
Where are your biggest gaps in collecting and applying data for Empathy today?

A. Experience Design
B. Personalization
C. Continuous Improvement
D. All of the above - HELP!
NEXT IN THE SERIES:

WEDNESDAY, AUGUST 18

WEBINAR:
Maximizing Human Effectiveness