People Data as a Business Accelerant: Turning Data Into Action

SEPTEMBER 1, 2021
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.
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

35% MINDSET/VISION
30% PERSON/AUDIENCE
25% JOURNEY/PROCESS
10% SOLUTION/TECHNOLOGY

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Learning Goals

➔ **TAKING ACTION**: Understand how to connect DATA to STRATEGY to IMPACT

◆ EXPERIENCE DESIGN
◆ PERSONALIZATION
◆ CONTINUOUS IMPROVEMENT

➔ **PEOPLE PRIORITIES YOU CAN ACT ON NOW**:

◆ RETENTION & HIRING
◆ DIVERSITY, EQUITY & INCLUSION
People data should inform **EXPERIENCE**, be put to work for **PERSONALIZATION**, and allow for ongoing **IMPROVEMENT**. **THIS IS HOW YOU SHOW EMPATHY.**
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
Have your HR Technology implementations/deployments in the last 2 years leveraged PERSONAS?

A. Yes
B. No
C. Not Sure
**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.

**Insights**

- 54% of those surveyed develop a skill to be in a better spot for a promotion.
- 46% do not feel like there are enough development programs.
- 24% feel like they are rewarded for engaging in growth and development activities.

**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.

**My Barriers**

- Lack of Time
- Reorganizations
- Policies
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/CO-WORKER VIA TECHNOLOGY
3. MANAGER/CO-WORKER IN PERSON

**HOW I ADAPT TO CHANGE & LEARN**
- **Small Groups**
- **Change Agents**
- **Degreeed Videos**
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.

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

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

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

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

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

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

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

- I received a few emails with conflicting information which is a little confusing, I hope I don’t miss something.
- 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
- 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.
- 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.
- I am grateful for this job, but I would have expected a better, more composed onboarding experience from such a large organization.
- 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.
- 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?

**Scenario**

**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

**First Week**

- Connect with my manager
- Finish the setup process
- Waiting for my online training to be assigned
- Learn how to order supplies, equipment, and access

**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

**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

**My Ideas**

- Checklist that covers required actions, technology, and contacts
- Orientations sessions done as a cohort so I can interact with others
Employee Experience
Creating a culture where we can thrive, from wherever we are

HOW WE ARE SHAPING POLICIES

Empathize
We are listening by having meaningful conversations with our peers to gain empathy & understanding.

Educate
We are learning by looking at our own journey and outward to other orgs and current trends.

Enhance
We are iterating the policy by taking an agile approach that allows for continuous improvement.

ON SITE

CHALLENGES
- Distractions from "dropping" noise from open concept offices. & frequent trips to the coffee pot on the other side of the office interrupt productivity.
- Commuting to the office and/or parking capacity issues.
- Health & safety concerns.

EXPERIENCE BOOSTERS
- Respect remote lines and understand that onsite workers have greater time constraints.
- Determine and stick to team-level agreements around availability and communication.
- Recognize that most onsite workers never had a remote experience and have continued going to the office.

PEOPLE MANAGER CONSIDERATIONS:
- Be transparent about what teams can expect onsite, what flexibility onsite workers have, and create space for the anxiety many employees are feeling about returning to the office.

REMOTE

CHALLENGES
- Ability to flex between "work" and "life" throughout the day.
- Time savings around commute and getting ready for the workday.
- Heightened productivity due to fewer distractions and interruptions.

EXPERIENCE BOOSTERS
- Speak transparently and address issues as they arise, rather than letting them fester.
- Reach out, even when you don’t need something specific.
- Be accepting of imperfection - being real, messy homes, etc.

PEOPLE MANAGER CONSIDERATIONS:
- Recognize that remote workers may feel overwhelmed by the blurring of work and life environments, so emphasize results over hours logged to help maintain positive work-life harmony.

HYBRID

CHALLENGES
- Must live near the office, even though only going in part-time.
- Must adapt to both on-site and remote cultures, and be able to alternate regularly.
- Desk hosting poses logistical challenges and additional barriers to onsite productivity.

EXPERIENCE BOOSTERS
- Understand that hybrid is a new way of working, and embrace the learning curve.
- Respect their boundaries for both onsite and remote days, and understand these may be different.
- "Wing it" / "let’s do this" - Utilize collaboration tools to document conversations, both face-to-face and remote.

PEOPLE MANAGER CONSIDERATIONS:
- Allow hybrid workers a grace period as they adjust to new ways of working. Create structure and consistency that build their team’s confidence and make them feel secure.

...and how we are the same.

We are all here in service to our patients.
Kindness is in our DNA.
We’re committed to our Company Values.
We all seek work/life harmony.

Relating to One Another
To understand how we are different...

PLUS
- Stronger sense of connection to the company and peers.
- More definition around the world of workday.
- Access to more powerful computing tools, ergonomic setups, & a defined workspace.

CHALLENGES
- Missing out on hallway conversations, side chats in meetings, and ad-hoc brainstorming sessions.
- Not getting face time with leaders, and therefore less relationship building.
- Losing informal connection with colleagues.

EXPERIENCE BOOSTERS
- Speak transparently and address issues as they arise, rather than letting them fester.
- Reach out, even when you don’t need something specific.
- Be accepting of imperfection - being real, messy homes, etc.

PEOPLE MANAGER CONSIDERATIONS:
- Be transparent about what teams can expect onsite, what flexibility onsite workers have, and create space for the anxiety many employees are feeling about returning to the office.

EMPATHY MAP SAMPLE

For more information on the Flex Work policy, please visit our Flex Work knowledge article.

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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
<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>
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<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>
Act NOW: HIRING & RETENTION
POLL #2

Is your company experiencing higher than average TURNOVER?

A. Yes
B. No
C. Not Sure

....and do you understand ROOT CAUSE?
89% of the workforce are experiencing burnout, wanting career progression, seeking work/life balance, needing recognition, lacking motivation, looking for a salary increase, and dealing with work disruptions.
89% of the workforce experienced burnout in the last year.
40% are looking to change jobs in 2021.
How are you trying to retain your top talent?

- Understanding employee engagement & sentiment
- Applying traditional HR practices
- Partnering with consulting firms

These strategies are **complex, costly** and lack **root cause identification**
How are you trying to retain your top talent?

- Understanding employee engagement & sentiment
- Applying traditional HR practices
- Partnering with consulting firms

There is a better, more efficient way to retain your best
The answers to your retention issues are within your data

Understand your data and you will see:

- Which employees are most likely to leave
- Why they want to leave
- What you can do about it
Go beyond surveys

Know your employees like never before

See which populations and individual employees are most at risk of leaving, and why

Curated insights highlight all underlying risk factors to help proactively address retention issues

Data-driven approach surfaces concrete, employee specific initiatives
STOP THE EXIT

11 Key Retention Metrics to Know

1. Turnover rate (defined for your org)
2. Resignation correlation
3. Resignation segments
4. Resignation drivers
5. Business metrics
6. Performance turnover in key jobs
7. Revenue lost due to position vacancy days
8. Risk of exit
9. Promotions actioned
10. Training impact on performance and promotions
11. Quality of hire and new hire performance

visier.com/now/retention
Background
As the third-largest credit union in British Columbia, Canada, First West Credit Union holds nearly $11 billion in assets under administration and serves close to 250,000 members.

Challenges
- 4 mergers from 2010 to 2015
- No ability to customer build its own analytics tools
- Scattered data across systems that were disconnected

Results with Visier
- Significant reduction in turnover
- Streamlined recruitment processes
- Enhanced insight into employee movement
Spike in calls about performance management processing. Associates are confused about the new performance management framework and how to apply it to the process.

The Talent team adds some clarifying language to the talent site in the HR Service Layer.

One of the top three search queries is also a high volume call topic. Associates are searching for answers online and calling MyHR when they can't find the answers they are looking for. Supporting the search with accessible knowledge content enables users to find what they need without having to call.

Individual associates are opening multiple cases in a short timeframe. 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. Updating the internal knowledge base to provide agents with the full context to solve the associate's inquiry.

Workday system analytics show a bottleneck in the onboarding process. Managers are not completing the "New Hire Welcome" task which is delaying the entire onboarding process by 24-48 hours. Assign manager notification but remove manager step.

**REAL LIFE EXAMPLES**

$2.5 million generated in revenue with turnover reduction and upskilling, building a data-driven culture to **lower costs and strengthen engagement**
Focus on what matters

Target strategies with the most impact

Granular, employee-level insight highlights opportunities to retain high-performing talent

Embedded consulting to provide goals, plans and actions that deliver results

Quarterly progress reviews with expert consultants ensures accountability and progress towards goals
Empower leaders to take action

Expert advice informed by your data

Focused content to educate and enable leaders to better manage retention

Best-practice guidance enables your managers to proactively address risks within their teams

Expertise to build a tailored approach and strategy
Expert advice informed by your data

Visier Expertise to solve your retention challenges

Assessment and Recommendation

Lead with data and analysis:
- Analyze your data to identify specific retention challenges
- Assess predictive risks of exit and their root cause
- Detail results, recommendations and actions

Action Planning and Goal Setting

Create an action plan:
- Leadership review of customized risk assessment
- Create retention goals based on expert recommendation
- Visier Experts will create a customized view of retention issues

Monitoring and Reinforcement

Monitor for success:
- Create content to monitor progress
- Provide change management expertise to support rollout
- Ongoing support to ensure success including communication, training, and reinforcing action

Education and Enablement

Ongoing partnership:
- Monitor usage of the solution
- Track progress against your objectives
- Ensure program stays on track
Act NOW: DIVERSITY, EQUITY & INCLUSION
Is your company measuring progress against DIVERSITY, EQUITY & INCLUSION GOALS?

A. Yes  
B. No  
C. Not Sure
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
**KEEP YOUR PROMISE**

9 Steps to Set, Track & Measure DEI Progress

**ASK:** Assess your organization’s pipeline and headcount numbers

1. Drill into candidate & headcount numbers by gender, ethnicity, and other diversity indicators, *then* by job level, key roles, and tenure

2. Identify anomalies

3. Filter search to explore causes: trend analysis
ALIGN: Gather important stakeholders to drive necessary change

4. Collect context and observations from teams

5. Refine findings to add clarity and focus

6. Share findings with leaders to initiate data-driven decisions
KEEP YOUR PROMISE

9 Steps to Set, Track & Measure DEI Progress

**ACT**: Get clear on exactly what needs to be done

7. Set goals with targets and timelines

8. Guide your team to high-impact results

9. Monitor progress
   - Alongside promotion cycles
   - Before and after bonus cycles
   - At the start and close of hiring processes
   - Alongside succession planning discussions
   - Alongside development program nominations
SERIES FINALE:

TUESDAY, OCTOBER 5

WEBINAR:
Democratizing Insights for Superior Performance with