



EMPLOYEE EXPERIENCE PLAYBOOK

5 ways to use the voice  
of employee in reimagining  
the workplace of tomorrow

Medallia

## INTRODUCTION

# Employee experience has never been more important

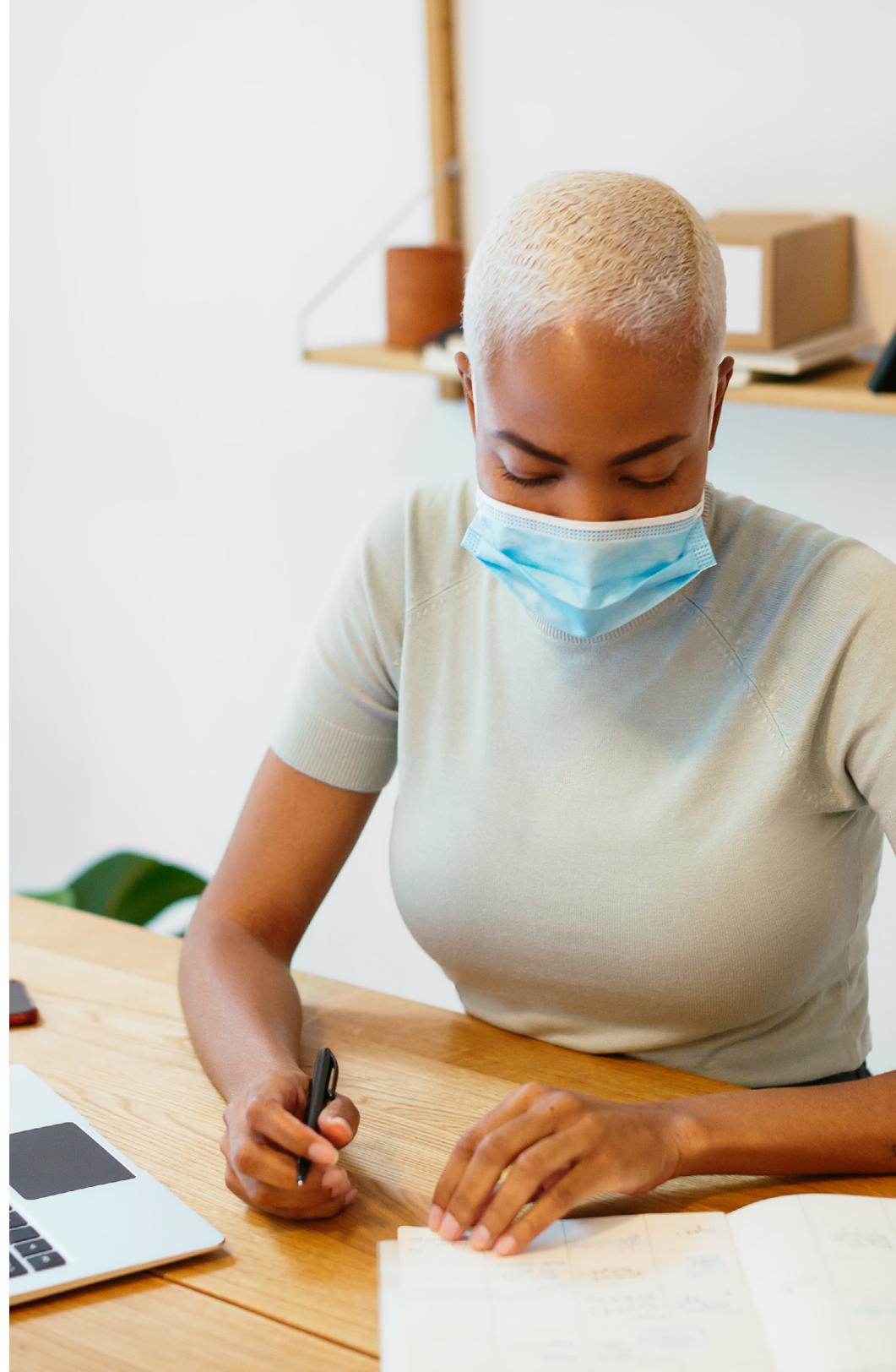
From remote work and job reassignments to furloughed employees now re-entering the workforce, how we live and work has changed dramatically. So much uncertainty has magnified the need for employers to inspire trust and connect with employees on a deeper level – with empathy, compassion, and authenticity.

Companies with strong and enduring cultures have taken immediate action to support employees. And as a result, the global crisis has brought HR and experience leaders closer and more connected to their people than ever before.

With a better understanding of what matters most to employees, organizations can operate effectively in this rapidly changing environment while thoughtfully reimagining the workplace of tomorrow. From aligning people to purpose and driving meaningful work, to reducing friction and fostering a culture that's safe, inclusive and flexible, employees have a lot to say and expect to be heard.

Decisions related to the next phase of re-entry require flexibility, consideration for personal circumstances, and new ways of how and where work gets done. **This is a defining moment in the history of work. How companies respond now is how they'll be remembered moving forward.**

This playbook details the challenges to engagement and the top five ways employers can establish deep and continuous connections to employees. Connections that empower people and teams across the entire organization to ultimately improve the employee experience.



# Think you know what your employees want? Think again.

Employee expectations were already changing before the global crisis. According to research by Aon, employees want remote work, flexible work arrangements, and more meaningful work.<sup>1</sup>

Plus employees now expect similar experiences at work that they get with brands like Uber, Netflix, Google and Amazon. They want multiple intuitive and self-serving touch points, to accelerate management's speed to react and respond, for example.

Yet, a Gartner study indicates that only 29% of employees say HR really understands their needs and wants.<sup>2</sup>

Another study found the majority of employees value the act of giving employer feedback with a strong desire to see their company improve, yet only 44% feel their employer cares and only 40% feel their feedback is heard or acted on.<sup>3</sup>

**This is called the employee disconnect.** A couple of ways the disconnect gets deeper:

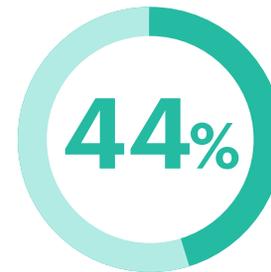
- Organizations that have employee populations in deskless positions who do most of their work in the field naturally feel less cared for and less valued by employers.
- Employees at large organizations feel less cared for and have increasingly less opportunities to share feedback.

Along with working remotely and for larger, less attentive organizations, there are several factors that cause the employee disconnect.



of employees say HR really understands their needs and wants.

Gartner Study, 2019<sup>2</sup>



of employees feel their employer cares.

The Employee Experience Imperative, 2019<sup>3</sup>



of employees feel their feedback is heard or acted on.

The Employee Experience Imperative, 2019<sup>3</sup>

# 3 reasons behind the employee disconnect

## 01.

### Infrequent feedback

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According to Gartner, annual surveys have steadily declined as true indicators of what's happening in the workplace. They are not frequent enough to provide an accurate perspective. Although they're decent predictors of employee behavior to identify general trends, they create siloed and fragmented views of actual experiences. They often do not catch early signs of disengagement, identify influencers or detractors, or detect patterns in evolving employee attitudes.

## 02.

### Inaccuracy and guesswork

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There's an assumption we know what employees want based on educated guesses or annual surveys. But we're missing moments of truth that are not always revealed in survey data. Day-to-day employee experience can change dramatically based on specific personal or professional moments. Life changes, like becoming a parent; or company changes, like new leadership, can trigger sentiments that influence how employees feel about their jobs.

**Did you know?** Of employees who have experienced moments of change, over half — and sometimes more than three-quarters — do not rate their employers highly based on those events. In fact, two-thirds of employees say their former employer did not conduct an exit interview.<sup>3</sup>

## 03.

### Slow responses

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First-generation HR experience tools allowed staff to send long surveys and collect insights. But they then had to manually thread the data together from disparate systems for a true analysis, resulting in long lead times before taking action. Not because the data isn't there, but because the platform hindered the speed at which the entire organization can respond. And by then, employees feel powerless.

**So how do we solve for the employee disconnect and create better experiences? By adopting these five essential practices.**

# 01 Listen in the moment, not after

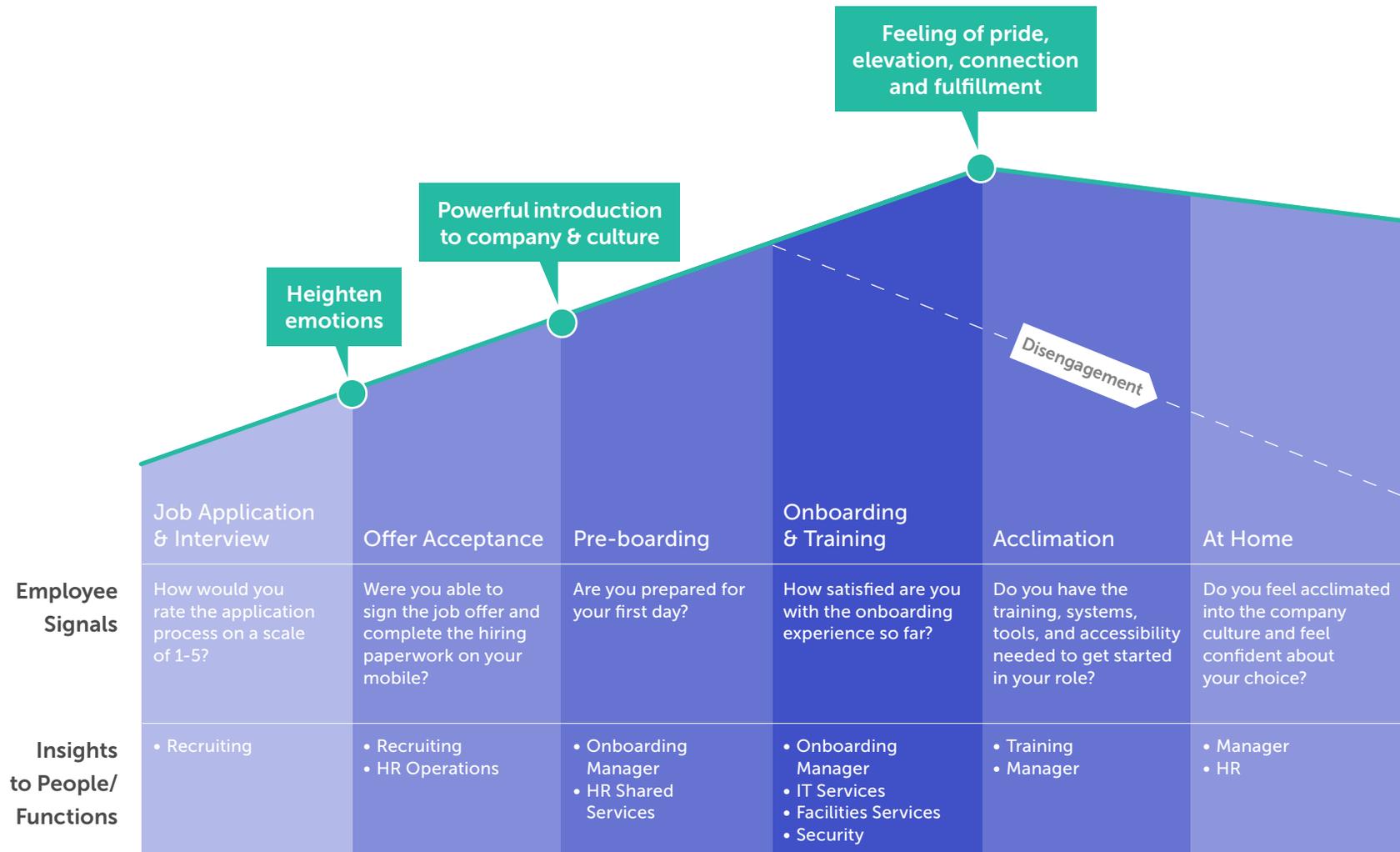
To stay connected to employees, it's critical to listen continuously across the employee journey by providing easy ways to surface issues and ideas as they pop up.

## Find the moments that matter

Today each of us will have a unique career journey with a collection of moments both big and small. Ubiquitous moments like the job search process, first day at work, annual review, on the job training, open enrollment, and offboarding, span across the employee lifecycle. People experience leaders will want to know how well they meet employee expectations during these moments that matter to make them as meaningful and fulfilling as possible. According to authors Chip and Dan Heath of *"The Power of Moments: Why Certain Experiences Have Extraordinary Impact"*, we tend to remember the best or worst moments of an experience, as well as the last moment, and then forget the rest as the particulars of everything doesn't matter. What does matter, however, is creating a "peak" moment – a moment that has a lasting impression. The following visual demonstrates the employee journey from pre-employment to 30-60 days – there are several small moments that can lead up to a "peak" moment where a new employee feels validated for their decision to join a company. As experience leaders, we want to create this "peak" moment by understanding how the experience is working (and possibly not working), by collecting feedback and operationalizing those insights to the right teams for action.



# New hire onboarding journey 0-60 days



## Moments in between

There are many times when employees may have a personal view, reaction or response engaging in a process or transition. Moments like a manager change, paycheck issue, transfer to a new department, or returning to the workplace after business closures can surface feelings of disconnect or frustration. They can also surface feelings of joy and engagement, resulting in increased effort and productivity.

**Did you know?** According to research<sup>3</sup> nearly half of employees do not find everyday moments easy to navigate. Things like difficulty receiving an update about a request, resolving an issue, and lack of accessibility to the right tools or systems has a negative effect on an employee's perception of their employer. Even big moments like starting a new job where enthusiasm peaks at the start but drops drastically by 22% thereafter, is a sign that employees still don't feel supported through the onboarding process.

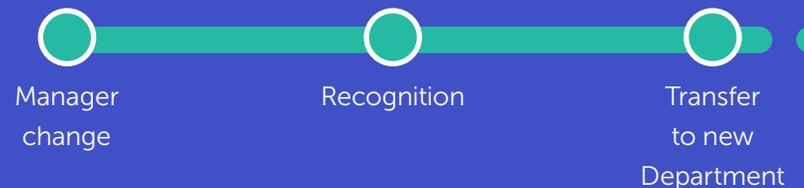
## The big moments



## The everyday moments



## Personal moments



# Moments that matter - case study:

## **How a leading American bank uses Medallia to capture in-the-moment feedback for major training initiatives.**

The Academy team at a leading financial institution is committed to ensuring all 40,000 of their teammates have an optimal employee experience through their learning and development program. To do this, the company administered an experience management initiative to collect real-time employee feedback and sentiments at critical touch points during and after the delivery of training.

With the use of automation and artificial intelligence applied to satisfaction scores and open-ended text feedback, the academy team was able to identify poor employee experiences that required immediate routing to a subject matter expert for recovery and real-time closed-looped feedback. This real-time analysis enabled the company to determine that 10% of employees self-report concerns or issues that if not recovered can ultimately lead to negative employee perception and behavior.

With the use of the Medallia platform for both employee and customer experience feedback management, they also uncovered that employees who rated higher in their feedback responses showed higher satisfaction scores from the customers they served.



The pandemic has forced us to reimagine our Academy curriculum at scale. Medallia has been instrumental by ensuring we can earn teammates' trust during this period of change. Direct sentiments like 'I need more training on network login process' to 'I don't feel I have everything I need to succeed in this new role' is the exact real-time data we need to base our curriculum on what employees actually need versus what we think they need."

**Academy Operations and Integration Manager,  
Medallia Customer, Investment Bank and  
Financial Services Company**

## 02 Go beyond surveys to uncover what's really happening

Engaging employees on their preferred devices captures the broadest set of signals and is vital to increasing the frequency of feedback.

### **Meet employees on their terms**

Today, the workforce can be segmented by four distinct populations: those in desk positions, those in desk positions who interact with customers frequently, in field positions with minimal customer contact, and in deskless positions who interact with customers daily.

It's important to meet each of these worker segments where they are in terms of their preferred ways of communicating so they can give timely feedback and share ideas.

- If a large box retail store associate has difficulty completing long surveys on a desktop, employers can simply send a quick pulse survey directly to their mobile device through SMS/text or an employer app. If the associate is returning to work after being furloughed, the company can pulse with a few pertinent questions for the associate to respond via mobile, or record responses through audio or video formats.
- An engineering employee in a remote position will have better accessibility to digital platforms like email, Slack, or employee portals to offer feedback.

In both scenarios, experience teams meet employees where they are, on their terms, whether it's through channels like mobile, email, or productivity interfaces. This increases their willingness to share feedback. Intuitive options like video, audio, and messaging provide far more information than open-end text responses.

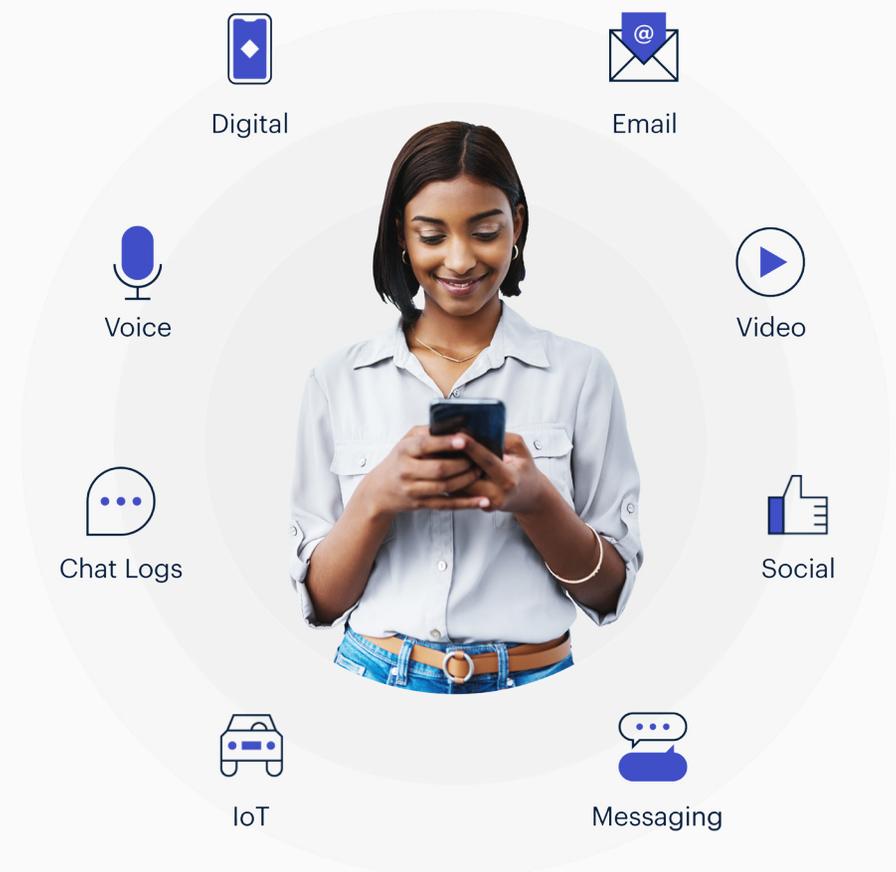
## Capture the broadest set of signals

Surveys capture the past. Signals power the present. Made up of digital and physical touch points, direct sources include solicited feedback like annual surveys, knowledge ratings, and polls.

Indirect sources can be a combination of observed behavior through social, video and speech, or operational data from systems of records. (HRIS, case and knowledge management, applicant tracking systems, or other point solutions.)

- Analysis from observed behavior through social listening on websites like Glassdoor can identify trends in why people leave, which then become signals for retention and recruitment challenges.
- Analysis from video feedback can quickly help organizations determine emotional and behavioral patterns that may lead to employee satisfaction and wellness indicators.
- Analysis from a conversation between employees and IT or HR can flag a signal about repetitive or recurring employee friction around process and knowledge gaps.

## More signals, more feedback



## Get the full picture with a unified view

A unified experience platform helps companies analyze all employee experience data, both unstructured and structured. Deep integrations with systems of record or engagement platforms surfaces data you'd otherwise miss.

- Annual engagement survey results may indicate employees self-reporting concerns on topics like burnout and work-life balance. Pairing this analysis with HRIS system data on used and unused vacation hours will offer a much more complete view while offering suggested systematic improvements.
- Rich data from video feedback may show that training is falling short of employee expectations. But additional insights might be needed. Pairing this data with other training feedback such as satisfaction scores and emerging topics like quality of content and instruction will surface gaps and show how to best resolve them.



Surveys are just not specific enough for people to express their particular needs, so companies are being asked to open the aperture and let employees just talk, share a video, post a picture, or type.”

**Josh Bersin, HR/IT Industry Analyst**

# 03 Break down the silos

HR must partner across the organization to design programs that are aligned to the employee value proposition.

## HR no longer owns the employee experience

Employee experience is morphing from an HR-only priority to an enterprise-wide strategy. Departments from HR, IT, and workplace services are now focused on improving the employee experience in every area. Many organizations are forming new employee experience teams and roles outside of HR, often reporting into the Chief Information Officer or Chief Experience Officer.

With employee experiences now increasingly being driven across multiple teams, every owner needs to be empowered with data-driven insights in order to inform decisions and improve employee initiatives.

Many teams are hindered by a lack of real-time insights. They're making decisions based on what they think employees want versus what they know employees want.

Why people functions need the voice of employee

	Human Resources	Managers	Training Operations	Shared Services or HelpDesk	Customer Experience
Focus	Attract, retain and motivate talent. Ensure employees are fully supported across the talent lifecycle.	Manage, develop, and lead functional departments across Marketing, Engineering, IT, Sales etc.	Implementing enterprise-wide learning and development programs at scale	HR, IT, Facilities: help desk/ticketing support across systems, processes, and programs	Delivering an exceptional, omni-channel customer experience
Challenge	Lack a holistic view of how employees are doing on a regular basis and how experience programs are impacting talent engagement, retention, and acquisition efforts	Have limited understanding of leadership's effectiveness or how organizational changes are impacting their people	Need to execute quickly with limited insight into engagement and consumption or even if they're meeting employee expectations	Missing insights needed to improve KPIs, meet SLAs, and design workflows that improve the employee service experience	Designing customer journeys and experiences without employee feedback or ideas

## 04 Use AI to power decision-making

It's one thing to capture signals across the enterprise. It's another to analyze every comment and turn each word into insight and action. This is where the power of AI comes in.

### **AI is your experience superhero**

AI uncovers hidden meanings in vast amounts of data to inform more meaningful decision-making. By applying machine learning algorithms to millions (maybe billions!) of structured and unstructured data points, AI analyzes text and detects new issues and trends as they arise, eliminating blind spots.

The platform then connects these insights and turns them into suggested actions, automatically routing them to the right teams—from the c-suite to the frontline—in real-time. With these suggestions, teams know how to best respond and what steps to take to have an immediate and positive impact on all aspects of the employee experience.



When the pandemic hit we didn't have the luxury of time to send surveys and wait for feedback. Medallia empowered us to take advantage of signals within channels employees would commonly surface questions like open-ended text and chatbot conversations. This live-time analysis helped us predict behavior around key topics like "how to procure monitor for WFH" and prevent surge in case volume."

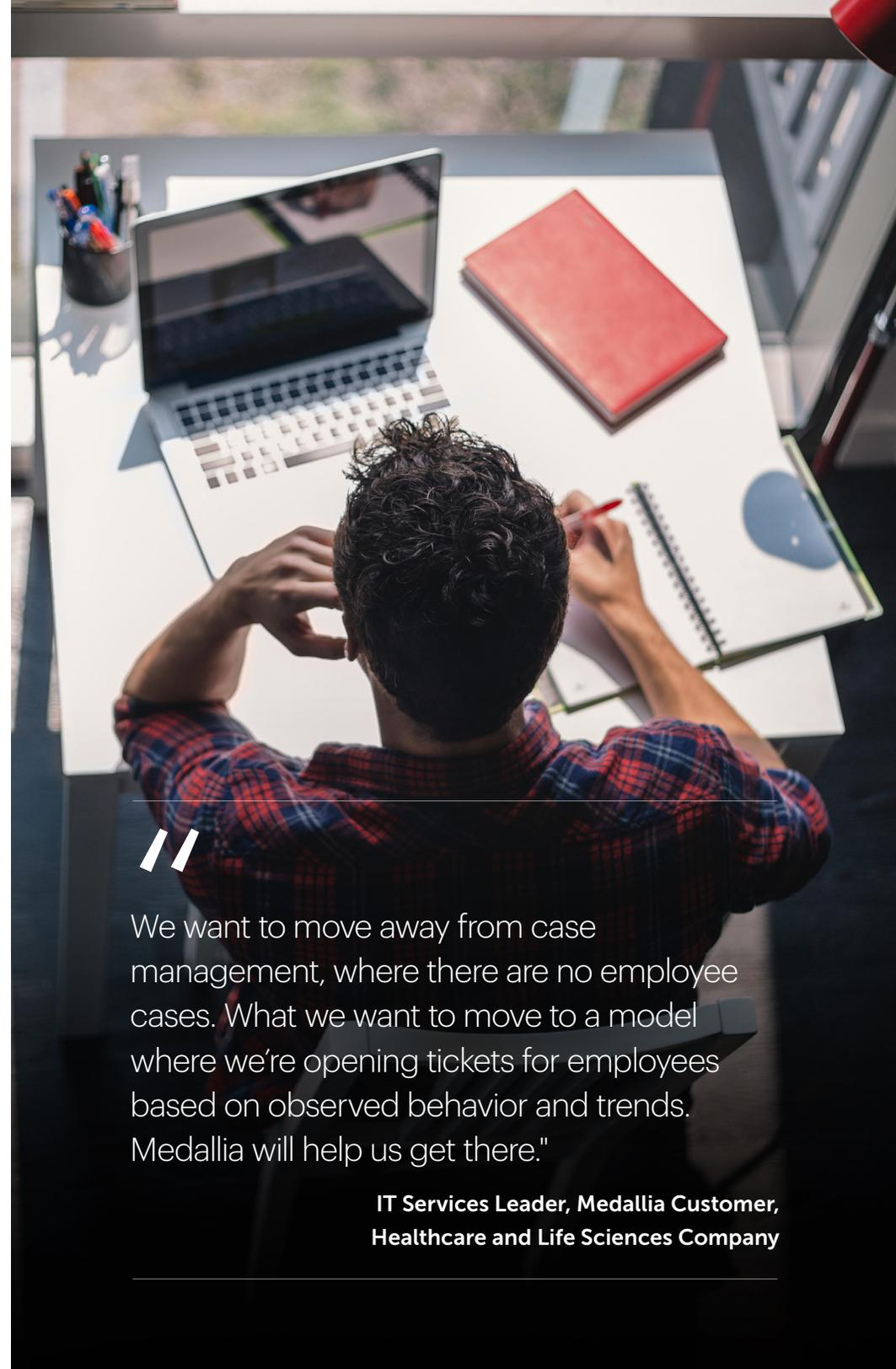
**IT Services Leader, Medallia Customer,  
Healthcare and Life Sciences Company**

## 05 Help teams take fast, decisive action

Organizations need to enable everyone to collect the right insights for taking effective action.

### Work better, together

No one group or department owns how employees engage and interact with procedures, systems, and tools. To simplify capture and management of employee feedback, end-to-end automated workflows route actionable information to designated stakeholders. They can then acknowledge employee comments or concerns in real-time, take the appropriate steps to resolve issues, and close the loop with the employee. Recurring feedback analysis will surface patterns and trends in employee behavior that can inform optimization of policies and programs. Using AI automates much of the manual work in determining next steps and can easily suggest action plans so departments can have clear goals. Suggested action plans can be monitored and tracked against key performance indicators.



“

We want to move away from case management, where there are no employee cases. What we want to move to a model where we're opening tickets for employees based on observed behavior and trends. Medallia will help us get there.”

IT Services Leader, Medallia Customer,  
Healthcare and Life Sciences Company

## CONCLUSION

# Act at the speed of employee expectations

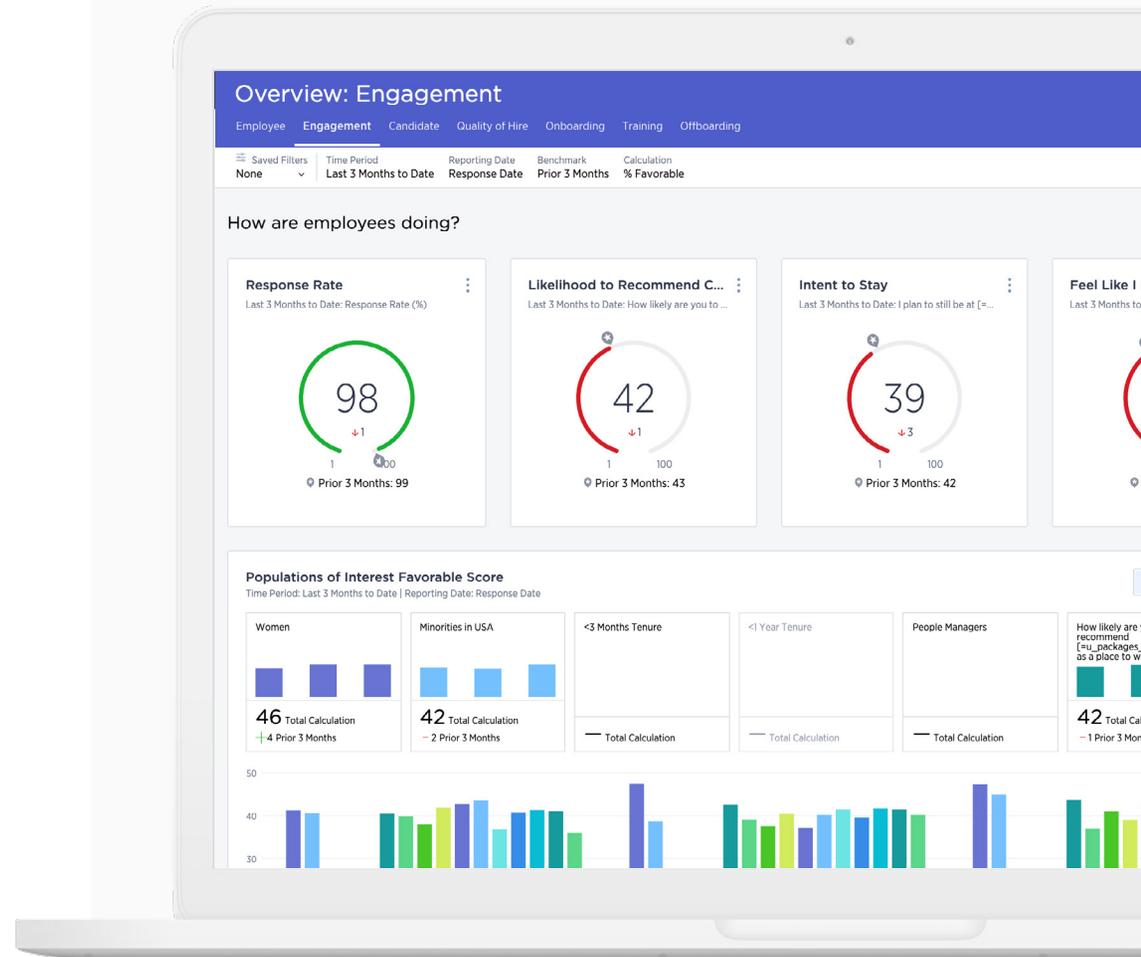
### Simplicity isn't enough

For as long as HR and experience software has existed, the business has struggled with low adoption, manual processes, and lack of deep insights. First-generation employee listening tools gave HR the ability to send surveys, collect insights, develop action plans, implement and wait for whatever trend showed up in the next survey. This is listening 1.0.

Consumer-led technology has radically transformed personal experiences. Social platforms like Facebook and Twitter have increased the transparency and the speed which we connect and share. We often get quicker responses by tweeting than we would by picking up the phone. Employees expect the same at work. These consumer-like experiences have become a guiding principle for Listening and Feedback Management 2.0—fast, easy, effective.

### Simplicity + intelligence + action

1.0 listening systems are not enough. Not because they don't deliver the data, but because they require manual effort for true interpretation, thwarting quick action. Organizations need simplicity plus fast intelligence to embrace the many employee signals that are constantly pouring in to gain a better understanding. By capturing and understanding these signals, companies have a constant view from the employee's perspective at any given time. And by giving the right people fast visibility into these insights, employees are empowered to be an active part of shaping culture and experience.



## Medallia for Voice of Employee Solutions

Our platform enables companies to stay connected, elevating the employee experience by embedding rich and intuitive listening tools seamlessly throughout the employee journey, capturing real-time signals beyond just surveys.

Modern feedback capabilities such as voice, audio, and video make it easy for employees to share feedback on their terms. Advanced AI-enabled analytics provides actionable insights from expansive structured and unstructured data sets, enabling organizations to build data-driven strategies that increase employee satisfaction, reduce turnover, and strengthen company culture.



### Author

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Medallia

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#### Sources:

<sup>1</sup> <https://www.onrec.com/news/statistics-and-trends/aon-benefits-trends-survey-97-of-employers-see-employee-expectations-of>

<sup>2</sup> <https://www.gartner.com/smarterwithgartner/focus-on-moments-that-really-matter-to-employees/>

<sup>3</sup> <https://research.servicenow.com/assets/ServiceNow-GlobalEmployeeExperienceReport.pdf>

## About Medallia

Medallia is the pioneer and market leader in Experience Management. Medallia's award-winning SaaS platform, the Medallia Experience Cloud, leads the market in the understanding and management of experience for customers, employees and citizens. Medallia captures experience signals created on daily journeys in person, digital and IoT interactions and applies proprietary AI technology to reveal personalized and predictive insights that can drive action with tremendous business results. Using Medallia Experience Cloud, customers can reduce churn, turn detractors into promoters and buyers, and create in-the-moment cross-sell and up-sell opportunities, providing clear and potent returns on investment. Medallia has offices worldwide, including Silicon Valley, Buenos Aires, London, New York, Tel Aviv and McLean, Virginia. Learn more at [www.medallia.com](http://www.medallia.com).

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