

The Four Levers of Employee Experience to Create Sustainable Results

Authors: Stacia Garr, Karina Freitag



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Thank You to Our Sponsor

RedThread would like to thank Medallia for its sponsorship of this research, without which we would not have been able to complete this study.

A note from Medallia

Happy and engaged employees create better experiences, which lead to more satisfied and loyal customers and ultimately, brand and company growth. Market leading organizations create a virtuous cycle and recognize that a thoughtful and deliberate focus on managing employee experience is good for their workforce and their company.

From initial interactions with a company's recruiting website, to moments along the employee journey such as onboarding and training, and events such as job leaves or changing locations, the employee experience encompasses both ongoing relationship-oriented and transactional interactions across many different touchpoints, channels, and teams. Employee experience also includes how well employees are enabled to do their work—through shared services such as IT, workplace services, and procurement—as well as how their voices and ideas are heard.

But how is employee experience related to employee engagement? And how is employee experience connected to customer experience and business performance? We sponsored this study from RedThread Research to provide answers to those questions, and we are now excited to publish this report. Through stories and examples, the team at RedThread shows how culture supports employee experience and the key role that measurement and accountability play in the employee and customer experience connection.

At Medallia, we partner with leading organizations on their quest to optimize employee and customer experience and drive positive business outcomes. We hope this research is helpful along that journey.



About Medallia

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.

About RedThread



Sure, we're experts in performance, people analytics, learning, and D&I – and we're well-versed in the technologies that support them. But we're also truth-seekers and storytellers in an industry often short on substance, and too full of @#\$. Our mission (indeed, our very reason for existing) is to cut through the noise and amplify what's good. We look for the connections (or red threads) between people, data, and ideas – even among seemingly unrelated concepts. The result is high-quality, unbiased, transformative foresight that helps you build a stronger business.

If you want to learn more, reach out to us at hello@redthreadresearch.com or visit www.redthreadresearch.com.



The Four Levers of Employee Experience to Create Sustainable Results

Introduction

We embarked on this research because, like you, we heard the term “employee experience” being thrown around like a rag doll. Or maybe even better, like a magic eight ball. Every time you tossed it, the answer to the question “what is employee experience?” was different.

But one thing was clear: employee experience matters. The reasons may vary – demographics are changing,¹ we are in a hypercompetitive talent market,² and businesses need innovation and agility³ – but the urgency remains the same.

In fact, the emphasis on employee experience is such that, in a global 2018 study of five hundred CHROs, 83% of organizational leaders emphasized a positive employee experience as crucial to organizational success.⁴ There is also evidence that organizations with a strong employee experience have twice the innovation and customer satisfaction and higher profits than organizations with a weaker employee experience.⁵

So, we started this investigation. Along the way, we found that with all the hype, there was no shortage of ideas in articles, blogs, interviews, reports, and books, all professing to offer the latest and greatest magic formula for employee experience. But we also found that

1 *“Maximizing the Employee Experience: How Changing Workforce Dynamics are Impacting Today’s Workplace,”* Harrington B., Boston College Center for Work & Family, 2018.

2 *“2018 Employee Experience Report,”* Toluna Group & Udemy, 2018.

3 *“2019 Fortune 1000 Best Trends: Employee Experience at the Best Workplaces in America,”* Great Place to Work, 2019.

4 *“The New CHRO Agenda Employee Experiences Drive Business Value,”* Wadors, P., ServiceNow, 2018.

5 *“Building Business Value with Employee Experience,”* Dery, K. & Sebastian, I.M., MIT CISR Research Briefing, 2017.



many of them are written by folks who are trying to sell something. Solid, unbiased research on this topic was in short supply.

Compounding this problem is that employee experience is a somewhat abstract concept because it is fundamentally about dynamic human interactions, which are notoriously difficult to measure. Further, employee experience is focused on individuals, not just leaders or the organization broadly, which can also make it a challenging concept.

With so much to think about, it is no wonder there is so much confusion when it comes to employee experience. And with confusion comes the fear of making poor decisions and losing the two most important players in an organization: employees and customers.

To understand how organizations should approach employee experience, we conducted an extensive literature review. We also interviewed nearly 20 organizations that keep employee experience top-of-mind. We call these organizations “progressive” because they offer a different perspective from what is often found in the market and, to a certain extent, are pushing the envelope on employee experience.

At the core of our study was one question:

How should organizations create a compelling, delighting, and sustainable employee experience that results in high-performing, satisfied employees and loyal customers?

Over the course of our research, we identified the following additional questions:

1. What is employee experience, who does it focus on, and how does it differ from employee engagement?
2. What is the role of culture in supporting employee experience?
3. What is the role of measurement and accountability in employee experience and how can we use them to understand the connection to customer experience?

Employee experience is a somewhat abstract concept because it is fundamentally about dynamic human interactions, which are notoriously difficult to measure.

Key Findings

Our reading, conversations, and analysis uncovered five key findings:

1. There are four levers to a holistic employee experience (see Figure 1): a clear philosophy, a supportive culture, an articulated accountability, and an aligned measurement approach.
2. A clear philosophy identifies a target audience and clearly defines employee experience and its relationship to employee engagement.
3. A supportive culture is anchored to employee experience via employee-centric values, beliefs, and assumptions that reinforce five essential behaviors: collaboration, transparency, psychological safety, alignment, and feedback-sharing.
4. An articulated accountability distributes responsibility for employee experience strategy and large-scale issues among senior leaders. It also centralizes responsibility among individual contributors for sharing meaningful feedback and among mid-level leaders for effectively responding to it.
5. An aligned measurement approach to employee experience takes into consideration an organization's data analytics maturity and a clear data analytics strategy aligned to key business metrics.

Figure 1: Overview of the four levers of a holistic employee experience

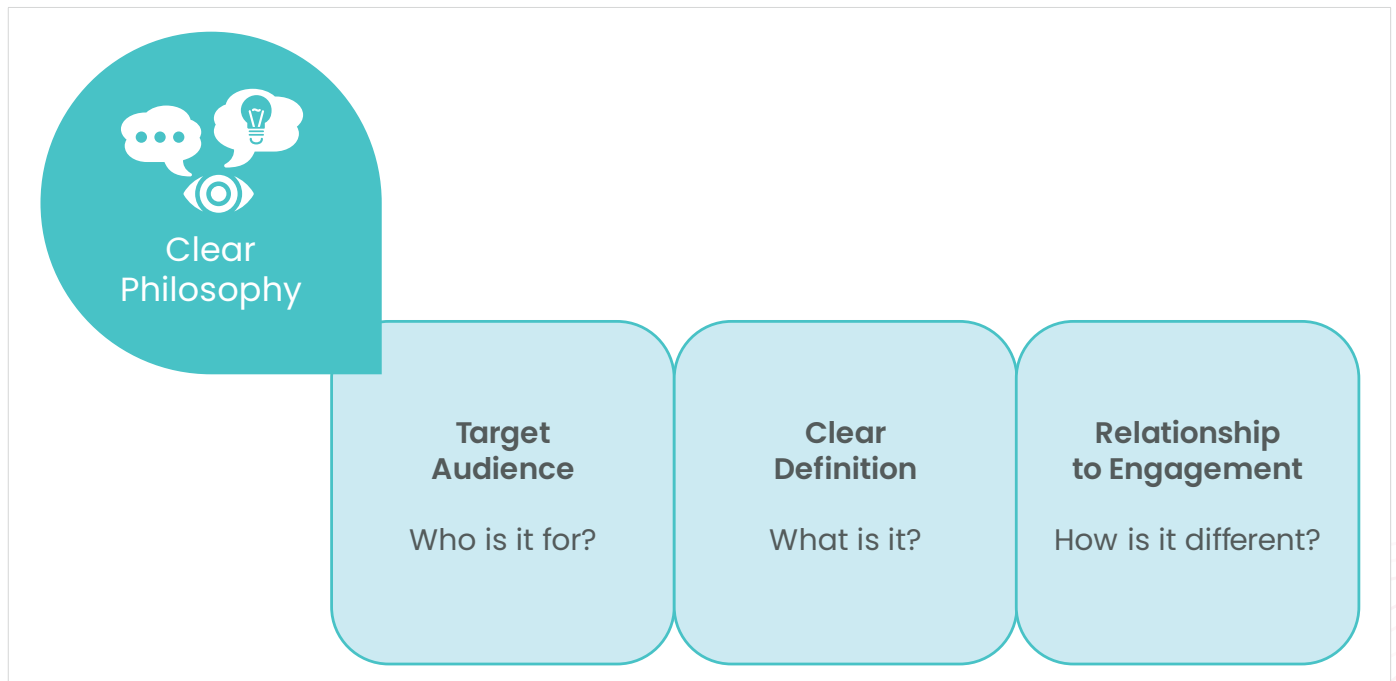


Source: RedThread Research, 2019.

Lever 1: Clear Philosophy

Over the course of our research, it became clear that the most progressive organizations have a very clear philosophy of employee experience: who it is for, what it is, and how it differs from employee engagement (summarized in Figure 2). This philosophy then guides all other decisions organizations make with regard to employee experience.

Figure 2: The three components of an employee experience philosophy



Source: RedThread Research, 2019.

Target audience: Focus of experience efforts

Before we could get into the weeds of precisely defining employee experience, we first had to figure out who it is for. When it comes to employee experience efforts, there are three viewpoints that organizations tend to focus on: employees, customers, or both (see Figure 3).

Figure 3: Where organizations focus their employee experience efforts



Source: RedThread Research, 2019.

We found that a lot of organizations focus on the two far ends of the spectrum. Only a few consider what both employees and customers want in an integrated fashion. But those that use a blended focus tend to see some of the most desirable employee and customer outcomes.

Consider United Rentals, a large equipment rental company with over 18,000 employees and \$8 billion in 2018 revenue. In 2017, United Rentals expanded its voice of the customer (VOC) program to reach more customers while enabling a quicker feedback cycle. The company rolled out its program to over 800 stores, and the solution was quickly embraced throughout the organization based on the near real-time customer feedback and a clear follow-up process with customers.

As the next step in its evolution, the team plans to augment its existing voice of the employee (VOE) program. United Rentals has always focused on customer and employee experience as a key part of its DNA. The programs, however, had been separate without the ability to link the employee and customer experience. Bringing both together in one system will provide a holistic look at the overall experience and surface actionable levers for improvement.

We found that a lot of organizations focus on the two far ends of the spectrum. But those that use a blended focus tend to see some of the most desirable employee and customer outcomes.

“VOC and VOE programs are incredibly powerful, but usually looked at separately. In reality, the employee and customer experience are inextricably linked. We see great opportunity in bringing the programs together to help further differentiate United Rentals as both an employer and a solution provider.”

– **Craig Pintoff**, Chief Administrative & Legal Officer, United Rentals

Another example comes from Humana, an American healthcare insurance company with more than 41,000 employees and an annual revenue of approximately \$60 billion.⁶ As we all know, call centers can be tough places to work, but they are an important part of a healthcare insurer’s business. Humana wanted to improve employees’ work experience as well as the customers’ experience with the organization. Therefore, Humana provided its call center employees with a voice analytics tracking software so they could receive feedback during calls with customers.

The technology analyzes voice signals to determine subtleties in speech and tone that may point to customer satisfaction or frustration and gives real-time feedback on ways to adjust. As a result of this intervention, Humana reported a 28% increase in customer satisfaction and a 63% increase in employee engagement,⁷ showing that they achieve the dual objectives of improving employees’ and customers’ experience.⁸

For the sake of this paper, we decided to spend our time primarily on the employee-focus and blended side of the spectrum, but we recognize that many organizations look at employee experience primarily from a customer-focus perspective.

6 *“Humana,”* Owler, 2019.

7 *“Artificial Empathy: Call Center Employees are Using Voice Analytics to Predict How You Feel,”* Nichols, G., ZDNet, 2018.

8 *“Artificial Intelligence and the Future of CX,”* Wilson, G. & Tussiot, C., Cogito, 2016.

Clear definition: What employee experience is

We combed through numerous sources of information in our quest to find a universal definition of employee experience, but we didn't find it. Instead, we read definitions that ran the gamut:

- "Designing an organization where people want to show up by focusing on the cultural, technological, and physical environments."⁹
- "The extent to which employees of an organization are enabled or constrained by its adaptive work environment and collective work habits to do their jobs today and reimagine their jobs of tomorrow."¹⁰
- "The combination of organizational culture, technological environment, processes, and physical environment that determines how employees perform and feel about their job."¹¹
- "Employees' holistic perceptions of the relationship with his/her employing organization derived from all the encounters at touchpoints along the employee's journey."¹²

These definitions were adequate as they capture important aspects of employee experience, but they were also lengthy and convoluted.

While we found these definitions adequate as they capture important aspects of employee experience, we also found them lengthy and convoluted.

Therefore, we developed our own concise definition of employee experience:

Employees' collective perceptions of their ongoing interactions with the organization.

While we hope this definition is simple enough to remember, there are some nuances that are important to explain. We illustrate the various elements of this definition in Figure 4.

9 "The Employee Experience Advantage," Morgan, J., 2017.

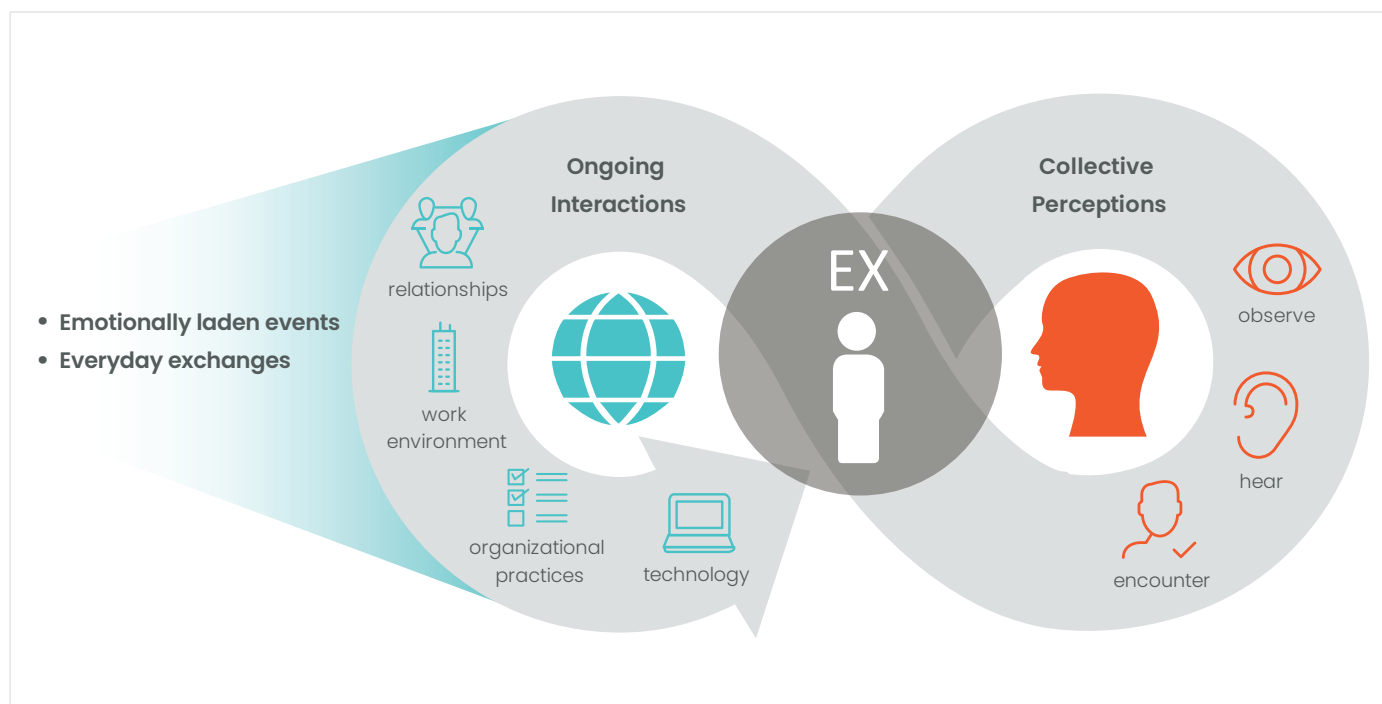
10 "Employee Experience: Enabling Your Future Workforce Strategy," Dery, K., Van Der Meulen, N., & Sebastian, I.M., MIT CISR Research Briefing, 2018.

11 "The New CHRO Agenda Employee Experiences Drive Business Value," Wadors, P., ServiceNow, 2018.

12 "Employee Experience: The New Human Resource Management Approach," Plaskoff, J., Strategic HR Review, 2017.



Figure 4: Summary of employee experience components



Source: RedThread Research, 2019.

First, let's talk about the word "perceptions." Perceptions are what employees observe, hear, and encounter. Importantly, note that perceptions are collective – not based on a single moment or experience.

Second, those perceptions are based on ongoing – again, not a single event or experience – interactions with the organization. Those interactions can be either emotionally laden events (often called touchpoints, moments that matter, or moments of truth) or everyday exchanges.

Finally, when we refer to the organization, we are talking about the work and social environment in which employees spend their working hours. That includes the physical and digital work environments, the organizational practices, the cultural behaviors and norms, and any social interactions.

"Employee experience is not just about going to work and earning a paycheck. It's about how do I weave a social fabric? How do I create a life journey?"

– **Kate Shaw**, Director of Learning, Airbnb

What's the difference between emotionally laden events and everyday exchanges?

Emotionally laden events often include specific events in the employee life cycle such as the first day at work, a promotion, or returning from a job leave. During these events, employees are vulnerable because their expectations are high, which can suddenly impact their experience.

Everyday exchanges are frequent interactions between employees, colleagues, and the organization. These interactions are often relationship-based and happen on an ongoing basis, instead of specific touchpoints, milestones, or moments that matter. During these everyday exchanges, employees are not as vulnerable as during emotionally laden moments because their expectations are not as high. Yet, these exchanges have a cumulative effect on employee experience.

Another important point to call out is that employee experience is fluid. It involves constant dynamic human interactions, and as such, it is an ever-evolving target.

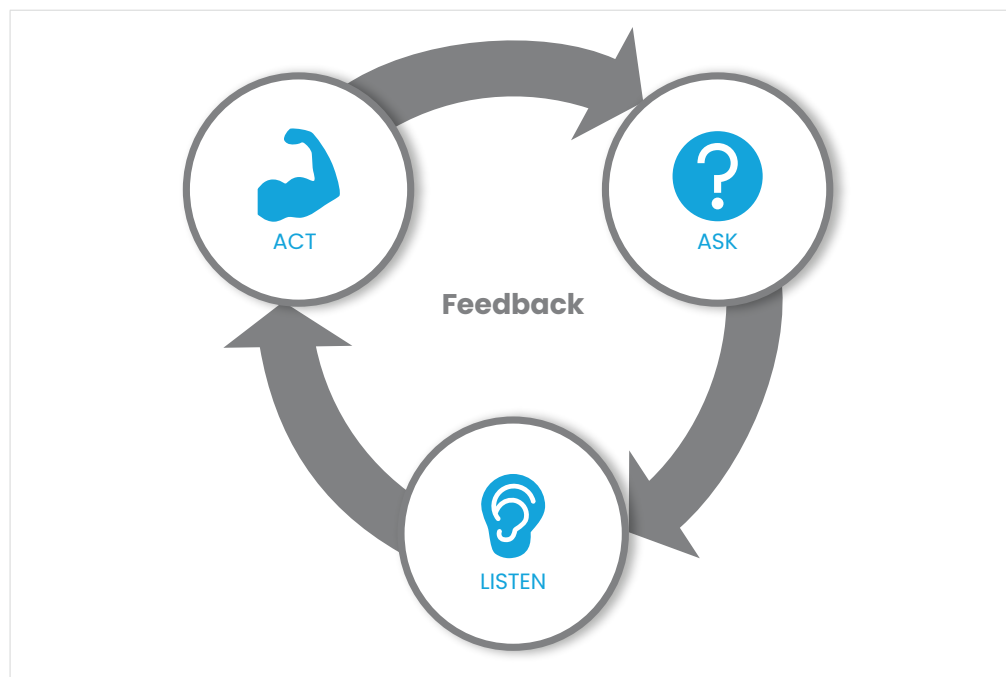
“HR people are used to working in waterfall, slow, 18-month release cycle models when it comes to process and technology, and that’s not how employee experience works. If I see that 80% of my workforce is breaking down in a process or not being engaged at any given moment, I don’t wait a year to deal with it like in old employee engagement surveys. I want to deal with it today.”

– **Jason Averbok**, CEO and co-founder, Leapgen

Progressive organizations adopt an iterative stance. They ask, listen, and act on employee and customer feedback in a frequent, swift, and repetitive manner.

To adapt to its fluid nature, progressive organizations adopt an iterative stance. They ask, listen, and act on employee and customer feedback in a frequent, swift, and repetitive manner (see Figure 5). Thus, they leverage real-time opportunities to capture, process, and address experience feedback.

Figure 5: Example of the feedback process at progressive employee experience organizations



Source: RedThread Research, 2019.

“Every single moment in the life cycle matters. From acceptance of offer to the very last day they’re with us. It doesn’t matter if they’re a new employee who just came on board or someone who’s been here 20 or 25 years.”

– **Vivian Maza**, Chief Culture Officer, Ultimate Software

Relationship to engagement: How experience and engagement are related

Now that we’ve clearly established our definition of employee experience, let’s distinguish it from employee engagement. It is important to do this for a few reasons. First, many people use the two terms interchangeably – and they are actually quite different. Second, the historical legacy of employee engagement has influenced how people approach employee experience. Having a clear understanding of the differences between the two enables us to chart a clearer path forward for developing a strong and compelling employee experience.

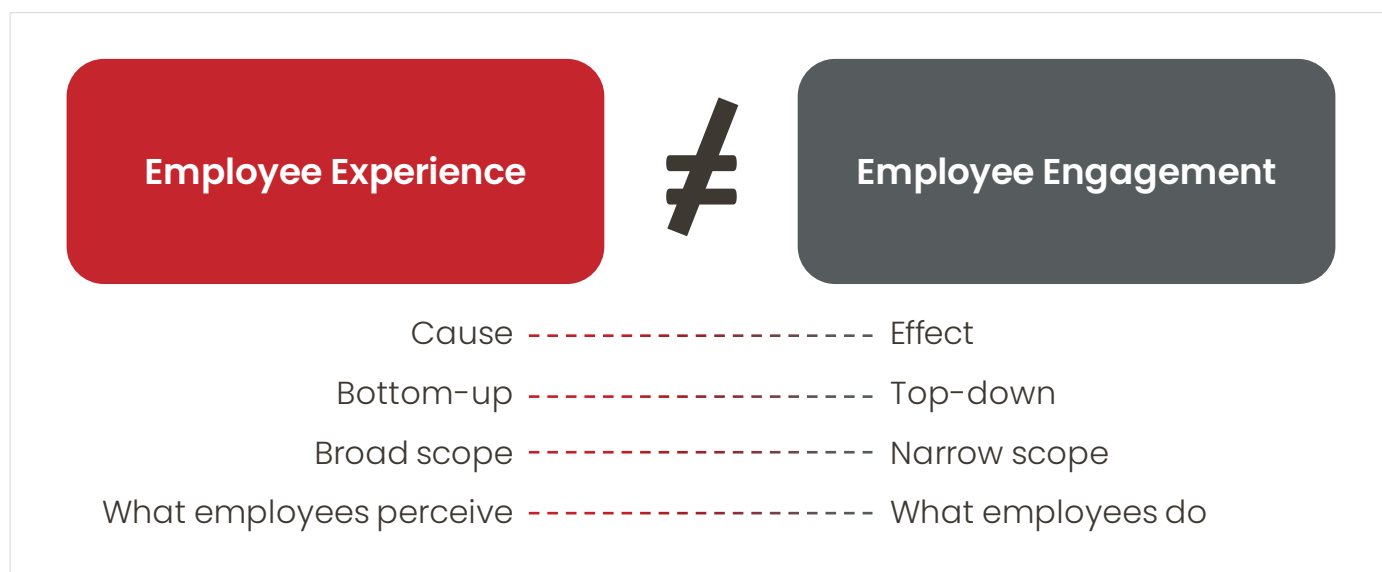
All that said, we define employee engagement as

A measure of energy, involvement, and concentration that is exhibited in work attitudes and behaviors.

Employee engagement is fundamentally different from employee experience (see Figure 6). It is a measurement of what employees do – their “exhibited work attitudes and behaviors” – versus what they perceive. There are other differences as well. For example, in engagement, organizations use a top-down process to develop strategies and implement activities that impact engagement scores. In employee experience, organizations use a bottom-up process to develop strategies and implement activities that impact employees’ perceptions.

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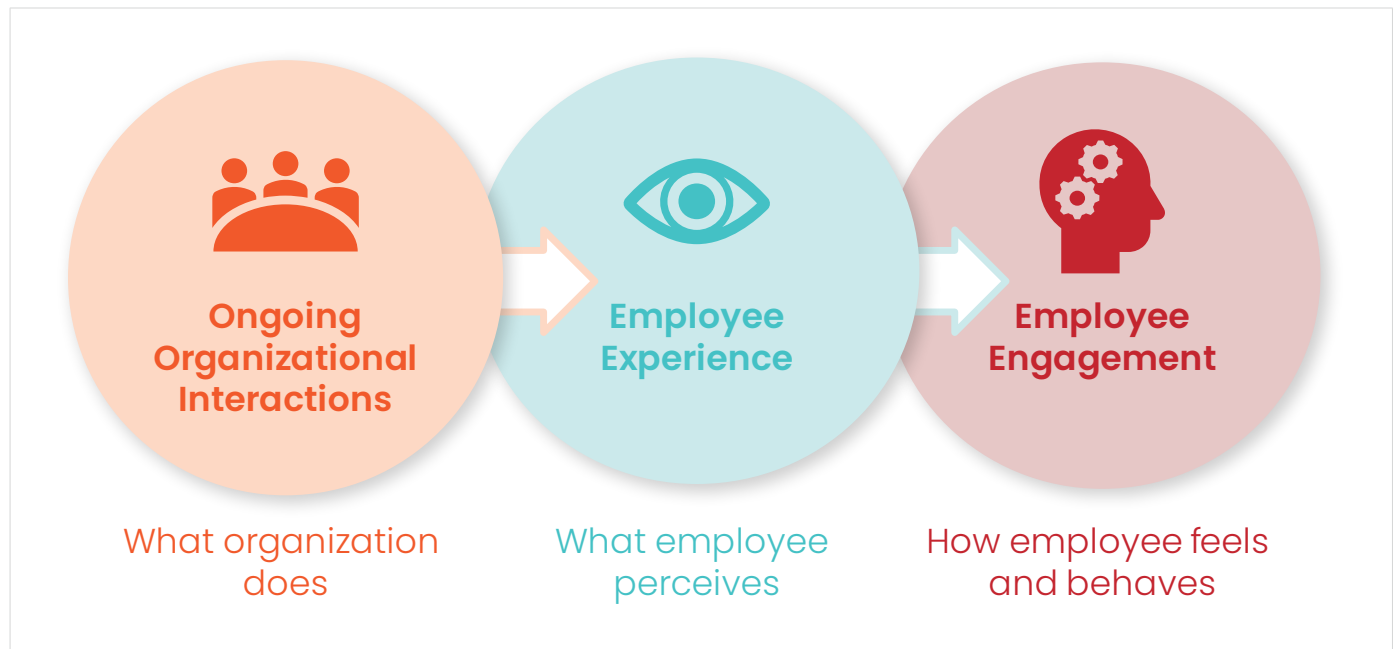
Figure 6: Summary of the differences between employee experience and employee engagement



Source: RedThread Research, 2019.

So, what is the relationship between employee experience and engagement? As we show in Figure 6, employee experience comes before engagement, so it can be one cause of engagement (though there can certainly be plenty of others). A simplified way to think about the relationship between all these different factors is explained in Figure 7.

Figure 7: A dynamic view of organizational interactions, employee experience, and engagement



Source: RedThread Research, 2019.

"We see experience as the vehicle that results in engagement."

– **Luciana Duarte**, VP Global Head of Employee Experience, HP

Company Spotlight: Kaiser Permanente Washington

Kaiser Permanente Washington offers health insurance and medical care to over 700,000 members in Washington state. With over 8,000 employees¹³ and driven by a genuine desire to provide the best quality services and care, Kaiser Permanente Washington has taken a closer look at employee experience.

In early 2019, HR leaders sought to understand what the organization needed and how they could contribute moving forward. HR needed to shift their mentality from a program-focus to a holistic perspective that connects employee experience to customer experience.

“We’ve always had a philosophy that employee experience and customer experience are directly linked. We know it’s not a new concept, but we still don’t create our HR functions to support this,” said a Kaiser Permanente Washington spokesperson.

Some HR people were used to owning end-to-end programs instead of being an integrated part of the business. To overcome this, HR leaders focused on education for team members in their own HR function and the wider organization. They communicated a clear and cohesive message on what employee experience is, how it relates to engagement and customer experience, and where to focus efforts.

Because employee experience was somewhat new for the organization, it required a different way of thinking and mental model. HR leaders made a concerted effort to connect to other areas of the business such as operations and customer experience.

¹³ “Who we are. Washington fast facts,” Kaiser Permanente Washington, 2019.

Early on, HR leaders partnered with operations – quality and safety – teams to have a seat at the table around their strategy. HR leaders wanted to help operations leaders understand that employees are the ones creating the customer experience. People strategy, as part of the operations strategy, was a key element in moving the needle on the organization’s patient satisfaction scores (a measure of customer net promoter scores in the healthcare industry).

HR worked with operational leaders to make half of the operations plan about people. They identified the specific competencies and behaviors needed to create a great employee and customer experience. Then they integrated those competencies and behaviors into their performance management system to drive greater accountability in demonstrating those behaviors.

Employee experience is still at an early developmental stage at Kaiser Permanente Washington. But they have seen positive movements in their patient satisfaction scores a result. Thus, they are constantly looking for ways to make an equal investment in both employee and customer experience.

“If we spend a lot of time thinking about business impact and the experience of customers and how that has an impact on our business, then we should be putting as much rigor and discipline into employee experience. It’s about having the same mentality of demonstrating the business impact of employee experience.”

– **Spokesperson**, Kaiser Permanente Washington

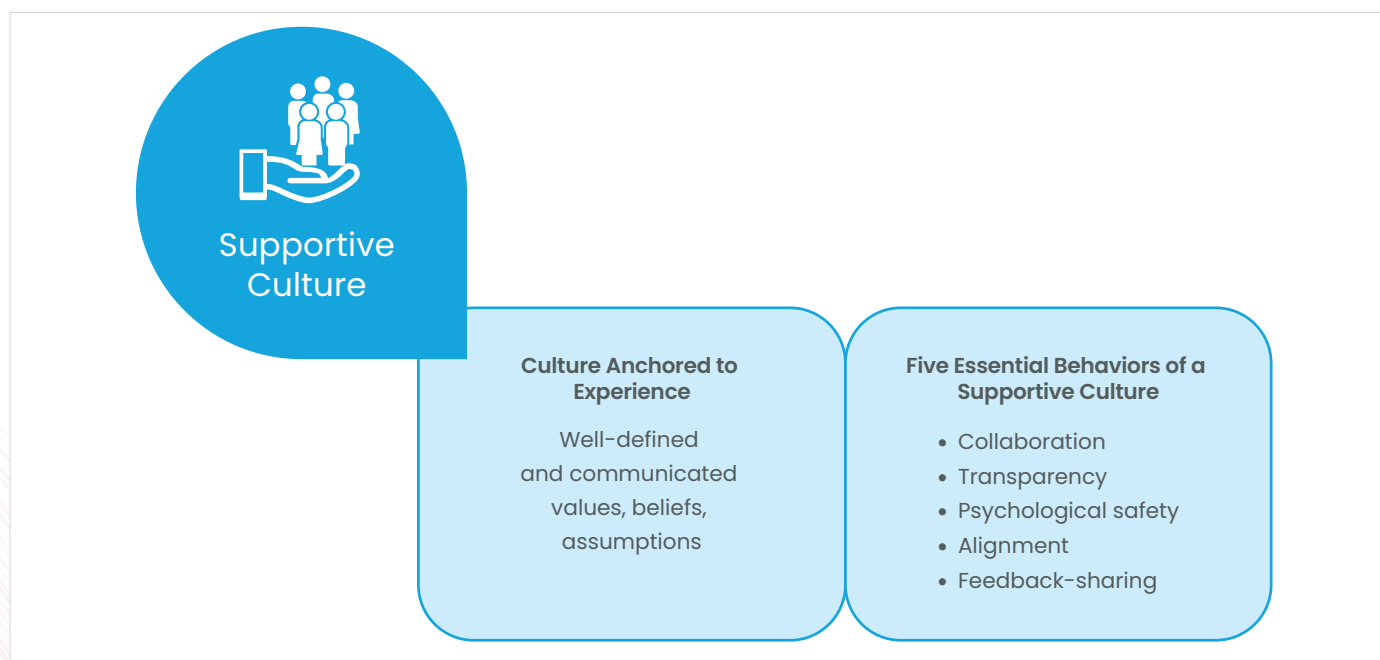
Lever 2: Supportive Culture

One of the common themes about employee experience that we repeatedly heard from progressive organizations was the importance of having a supportive organizational culture. Most of us have heard that culture is “the shared assumptions, values, and behaviors that determine how we do things around here”¹⁴ that helps people and organizations thrive.^{15,16} It is, therefore, no surprise that organizational culture is a key element in employee experience.

Supportive cultures that have values, beliefs, and assumptions anchored in employee experience drive core behaviors throughout the organization.

However, we wanted to uncover the nuances of what a supportive culture means for employee experience, and in our pursuit, we identified two components (see Figure 8). Supportive cultures that have values, beliefs, and assumptions anchored in employee experience drive core behaviors throughout the organization.

Figure 8: Elements of an organizational culture supportive of employee experience



Source: RedThread Research, 2019.

¹⁴ “*Manage the Culture Cycle*,” Heskett, J.L., The World Financial Review, 2011.

¹⁵ “*How To Build A Positive Company Culture*,” Kohl, A., Forbes, 2018.

¹⁶ “*The Leaders Guide to Corporate Culture*,” Groysberg, B., Jeremiah, L., Price, J., & Yo-Jud Cheng, J., Harvard Business Review, 2018.

We mentioned that a supportive culture is anchored in employee experience. But what does that mean exactly? In practice, progressive organizations have people – up and down the ranks – who accept the value of employee experience and model behaviors that reinforce it. Organizational climate, internal policies, and leadership – all constructs of organizational culture – contribute significantly to employee experience.¹⁷

Organizational climate, internal policies, and leadership – all constructs of organizational culture – contribute significantly to employee experience.

“We have a very collaborative culture. So for us, it was very important that we bring people together to talk about the desired employee experience, then make recommendations and decisions.”

– **Kate Miller**, Director of Employee Experience, Robert Half

You may ask, how do organizations build a culture that supports employee experience? We tackle this question and provide some ideas in our discussion of the two components of a supportive culture below.

Supportive culture anchored to employee experience: values, beliefs, and assumptions

A supportive organization weaves employee experience into its cultural fabric. It does so by clearly anchoring its values, beliefs, and assumptions to experience and accepting it as fundamental to success. Figure 9 shows what progressive organizations with a culture anchored in employee experience value, believe, and assume.

A supportive organization weaves employee experience into its cultural fabric.

¹⁷ “Influence of Cultural Environment Factors in Creating Employee Experience and Its Impact on Employee Engagement: An Employee Perspective,” Shenoy, V. & Uchil, R., International Journal of Business Insights & Transformation,” 2018.

Figure 9: Values, beliefs, and assumptions of a supportive culture



Source: RedThread Research, 2019.

"Our first belief, and we think about our values in that order, is that happy employees enable happy customers. Happy customers want to innovate with us. The ability to have great innovation allows us to attract happy employees and do really interesting work, and that creates a virtuous cycle."






– **Greg Pryor**, VP of People and Performance Evangelist, Workday

Yet, what sets organizations with a supportive culture apart goes beyond what they value, believe, and assume.

Five essential behaviors of a supportive organizational culture

A supportive organizational culture also fosters an experience mentality that encourages people to adopt, at a minimum, five essential behaviors (see Figure 10). While there may be other relevant ones in a supportive culture, we found that these five behaviors are table-stakes. We heard them mentioned over and over in our various conversations with organizational leaders. They also underscore the importance of employee experience as a fundamental priority to the wider organization.

Figure 10: Five essential behaviors of an organizational culture supportive of employee experience

	 Collaboration	 Transparency	 Psychological Safety	 Alignment	 Feedback-sharing
WHAT	Working cooperatively and jointly towards a common goal	Free from pretense or deceit; visible and accessible information of business practices	Climate in which people feel comfortable being and expressing themselves	Agreement between people who work together on shared interests or aims	Process of sharing information or opinion statements about a new process, product, tool
WHY	<ul style="list-style-type: none"> To understand employee and customer feedback To identify opportunities and address issues 	<ul style="list-style-type: none"> To leverage real-time opportunities to capture, process, and address issues To connect employees to the organization's mission 	<ul style="list-style-type: none"> To cultivate trust To encourage feedback-sharing, especially among frontline individual contributors 	<ul style="list-style-type: none"> To establish employee experience as an organizational priority To ensure all frameworks support experience efforts 	<ul style="list-style-type: none"> To serve as mediators between customers and the organization To share meaningful feedback To participate in decision-making
HOW	<ul style="list-style-type: none"> Communicate within and across functions Share ownership over experience efforts Develop joint efforts 	<ul style="list-style-type: none"> Ask, listen, and act on employee and customer feedback Communicate the organization's mission and how employees contribute to it 	<ul style="list-style-type: none"> Remain approachable and open to feedback Welcome criticism Show vulnerability 	<ul style="list-style-type: none"> Maintain consistent and coherent approach in messages, decisions, and priorities 	<ul style="list-style-type: none"> Share meaningful feedback on what matters to them as employees and to customers
EXAMPLES	Senior leaders keep employee experience present when making decisions. They ask: how will this impact experience for employees and customers?	Senior leaders and direct managers truthfully and constantly communicate relevant insights from employee and customer feedback. Individual contributors see the big picture of their work.	Senior leaders and direct managers use townhalls or team huddles to solicit input. Individual contributors feel comfortable sharing feedback.	Senior leaders and direct managers consider the potential impact of decisions on employee experience.	Individual contributors hear customer complaints and share opportunities to address it.

Source: RedThread Research, 2019.

Autodesk has figured out how employee behavior and practices align to the culture we care to cultivate. The business and senior leadership fully support The Culture Code we've developed and encourage healthy behavior within our system of business practices. The CEO's consistent reinforcement of The Code has reinforced the work our team does and helped us maintain the momentum for our most recent, successful business transformation."

– **Andrea Robb**, VP Talent, Culture, and Diversity, Autodesk

In a culture that supports employee experience, everyone – from senior leaders and direct managers to individual contributors – plays a key role. Although the five essential behaviors in Figure 10 may apply to everyone across levels, we found that in highly supportive cultures, senior leaders and direct managers often demonstrate collaboration, transparency, psychological safety, and alignment. Individual contributors are also adamant about sharing meaningful feedback. Essentially, how leaders behave paves the way for employees to frequently share meaningful feedback about themselves and about customers. This creates a supportive and reciprocal environment rooted in employee experience.

How leaders behave paves the way for employees to frequently share meaningful feedback about themselves and about customers. This creates a supportive and reciprocal environment rooted in employee experience.

"We have open door policies. Our CEO and I don't have secretaries. You can dial us directly and we're extremely approachable. We care about what our employees have to say and love to hear their feedback. They make us better every day and are critical to our success. It's about having a transparent and collaborative conversation."

– **Vivian Maza**, Chief Culture Officer, Ultimate Software

Company Spotlight: Venterra Realty Canada

Venterra Realty Canada is a real estate and property management organization based in Toronto. Employee experience at Venterra is the cornerstone for all employee relations. It is embedded in its organizational culture through every decision, conversation, and program.

“At Venterra, we ensure that we interlace our core values in every interaction and program that we have. This creates a cohesive and consistent experience for customers and employees alike, most notably in our WOW and WOW-EE programs,” said Natassa Zervopoulos, Director of Employee Experience at Venterra Realty in Canada.

Venterra highly values candor and openness and embeds these values in training offered to leaders and employees. They expect leaders to foster transparency through regular check-ins with their direct reports and team, including quarterly career development conversations. They continuously encourage employees to share meaningful feedback, whether it’s good or bad, and involve them in strategic conversations.

For example, when developing a program to encourage lifelong learning, the Canadian office asked local employees for candid feedback through a design thinking exercise. They wanted to know if using a learning program developed in the U.S. would be as successful in Canada. Upon discovering that Canadian employees disagreed with the approach, they solicited suggestions to create a learning program that would appeal to local needs and preferences.

Venterra embraced candor and openness in building out the lifelong learning program for Canadian employees. “External feedback such as Glassdoor reviews and internal feedback through focus groups and annual surveys are taken very seriously and always actioned. Hiring people that align with

our values and ensuring a culture fit is a top priority for us,” mentioned Natassa.

Having clear values and a supportive culture have helped Venterra Realty Canada to place employee experience at the forefront. Their successful efforts are reflected in the many industry and “best place to work” accolades they have received to date.



Lever 3: Articulated Accountability

We wanted to find out, once and for all: who is responsible for employee experience? Is it HR, marketing, operations, or technology?

In our quest to understand who's accountable, we found a wide variety of opinions. Some people think HR is responsible because it concerns people. Others think it's a coordinated effort across organizational functions.

“Everybody has a role to play in creating a good employee experience.”

– **Justin Hall**, Principal, People and Organization, PwC

Even though organizations hold differing opinions on who is responsible for employee experience, one thing is true in progressive organizations: HR still holds many of the cards when it comes to employee experience. Hands down, most of the people we talked to believe that because HR is already privy to employee feedback and talent management practices, it should serve as the hub for employee experience.

This means that, as a hub, it serves as a speaker of the house of representatives, like in government. And as an employee experience speaker of the house, it acts as a leader. It upholds standards, coordinates efforts, maintains order, and tracks progress.

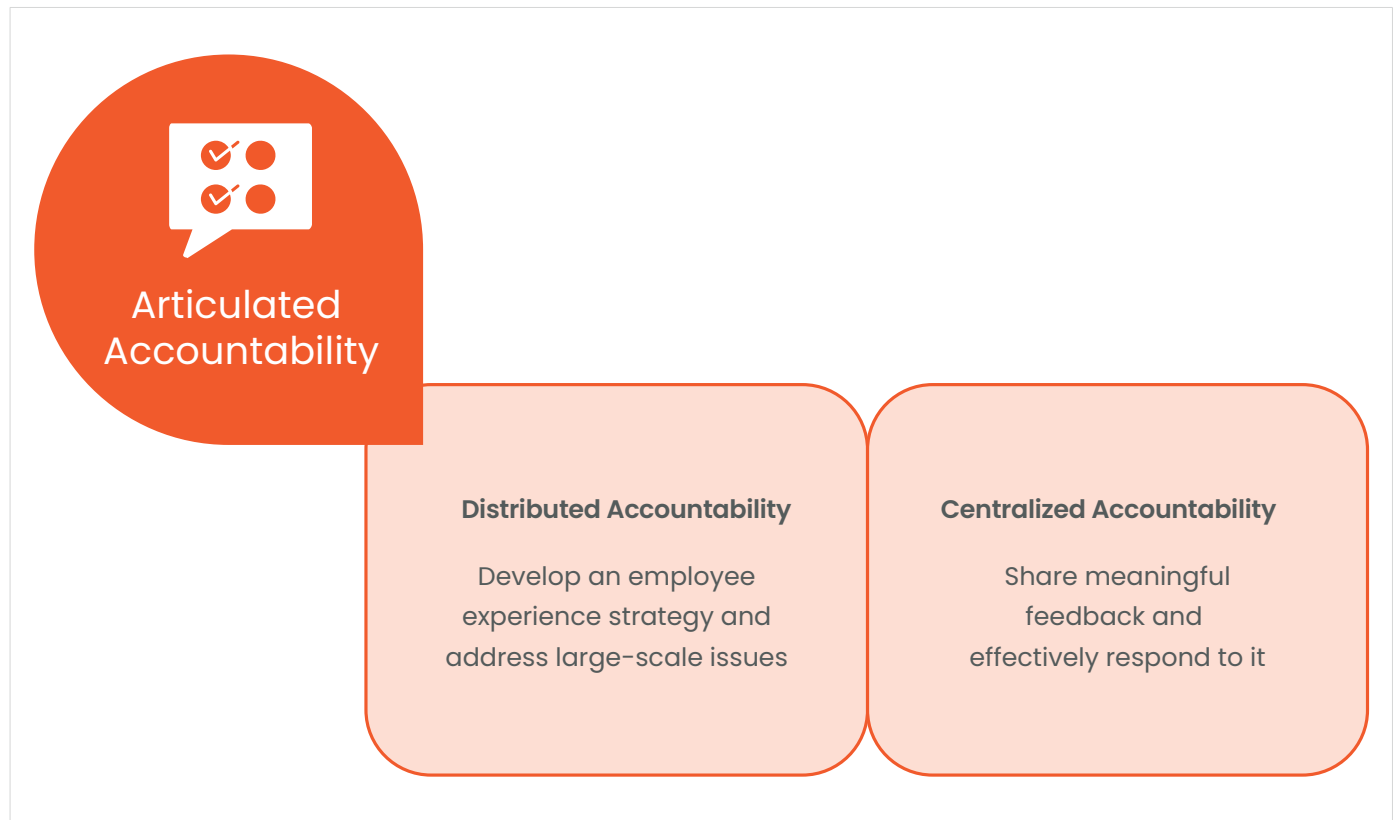
“For HR processes, it's HR. For other internal processes, then it's the different functions.”

– **Luigi Maria Fierro**, Global Head of HR Strategy and Transformation, ING

In progressive organizations, accountability doesn't just begin and end with HR. Instead, they define accountability as being either distributed across functions or centralized to a specific manager or team.

So, this is not much of a surprise given that HR has historically taken on the people-advocate role. But what's interesting is that, in progressive organizations, accountability doesn't just begin and end with HR. Instead, they define accountability as being either distributed across functions or centralized to a specific manager or team, and they further define what that means for the employee experience (see Figure 11).

Figure 11: Distributed vs. centralized accountability for employee experience

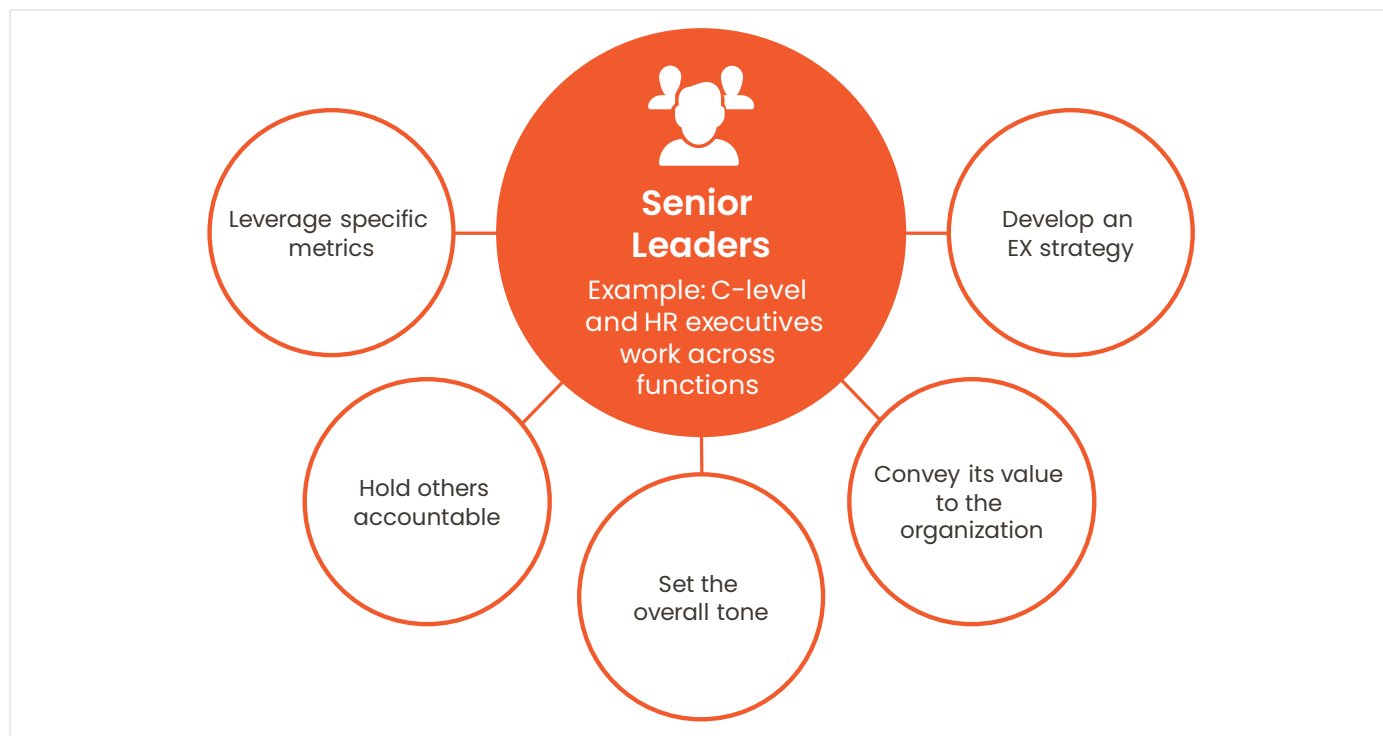


Source: RedThread Research, 2019.

Distributed accountability: Leaders are responsible for strategy and large-scale issues

In distributed accountability, leaders are responsible for the employee experience strategy and vision. This is a plan of action designed to achieve the best and most appropriate experience for the organization. It also includes organization-wide interventions, which are often necessary to address employee feedback.

Figure 12: Distributed accountability for employee experience strategy



Source: RedThread Research, 2019.

In progressive organizations, we often found that senior leaders in HR, and especially those in executive positions, play a key role in tackling these macro-level aspects of employee experience (see Figure 12).

“Our employee experience design is not meant to be a top down approach, except for The Culture Code being leader-led. Our goal is to measure the whole talent experience end-to-end, so that leaders can create safe places for courage to flourish. It’s not an HR program, rather it’s up to our employees to create and nurture a meaningful experience for each other and themselves. This gives our Talent organization the ability to focus on enabling leaders to create an environment where our core values live and breathe in an authentic way and connect to the ways we work.”

– **Andrea Robb**, VP of Talent, Culture, and Diversity, Autodesk

Leaders in HR – working closely with leaders across functions – hold a powerful role in developing a strategic vision for employee experience. They are responsible for understanding the big picture of employee experience and developing a coherent strategy at the upper echelons of the organization. This is not to say that they operate in a top-down manner. If you recall the speaker of the house example, these senior leaders uphold standards, coordinate efforts, maintain order, and track progress. They also play a key role in conveying the strategy's value to the organization and setting the overall tone.

Leaders who do this effectively use specific employee metrics – such as engagement, satisfaction, net promoter scores, or retention indicators – to hold others accountable. Metrics give leaders a common language that is understandable and relatable to the wider organization. In progressive organizations, these metrics often roll up and align to organizational performance indicators. Employee metrics are also as carefully tracked as financial measures.

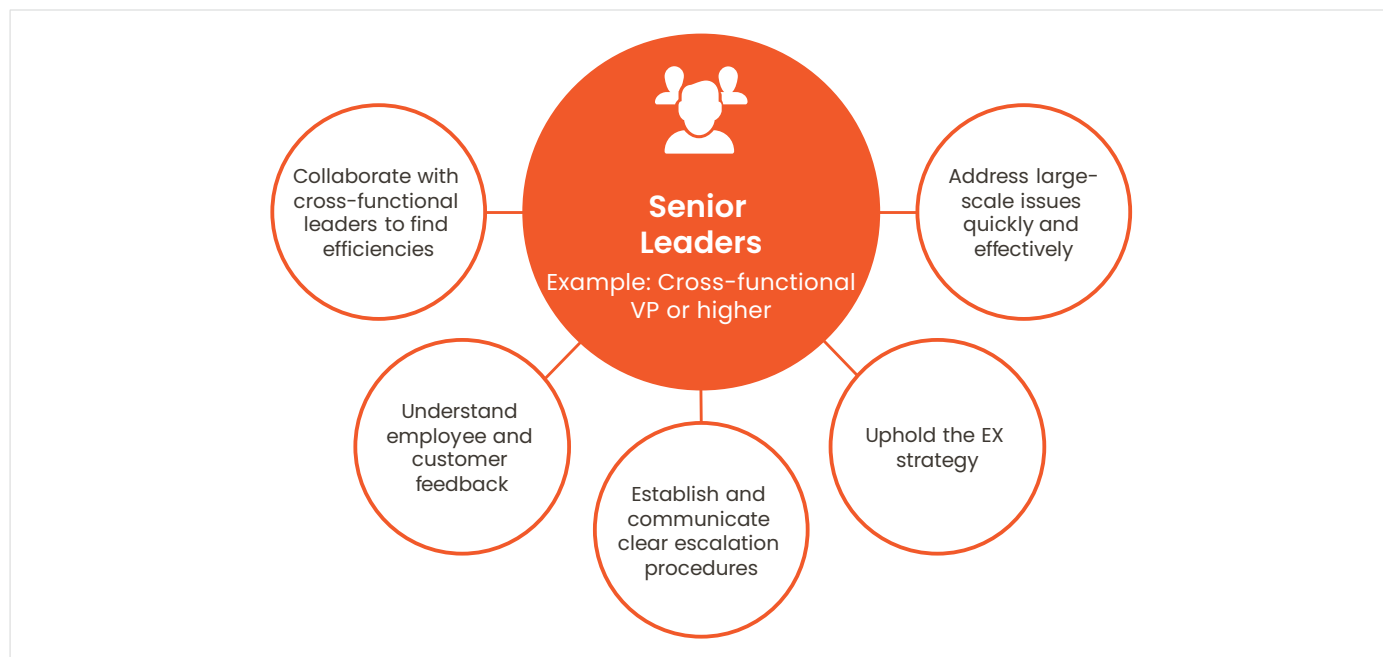
“As a company, we have six company level objectives. And one of them is around employees and enabling them to do their best work every day. Our goal is to ensure that at least 85% of our employees are having a level 4 or 5 employee experience.”

– **Greg Pryor**, VP of People and Performance Evangelist, Workday

Metrics give leaders a common language that is understandable and relatable to the wider organization. In progressive organizations, these metrics often roll up and align to organizational performance indicators.

Senior leaders, especially those in VP positions or higher from a wide variety of functions (not just HR), are also responsible for addressing large-scale issues quickly and effectively (see Figure 13).

Figure 13: Distributed accountability for large-scale employee experience issues



Source: RedThread Research, 2019.

To do so, senior leaders uphold the employee experience strategy while seeking to understand employee and customer feedback. They collaborate with other leaders across functions to successfully address large-scale employee experience issues. They also establish and communicate clear escalation procedures for employee and customer feedback.

In progressive organizations, cross-functional senior leaders hold a special place in employee experience because they have the power to successfully address any organization-wide issues pertaining to their areas of expertise. Thus, having clear escalation procedures – in which people know which issues to escalate, how to communicate them, and to whom – for any organizational issues that arise at the local level is crucial.

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“It’s important to detail the business rules to make your VOC program actionable and impactful. For example, if you get a detractor, how fast do you need to respond? Who needs to respond? When does it get escalated? Addressing a detractor quickly – while you still have a chance to fix the situation – is very important.”

– **Chris Hummel**, Chief Marketing Officer, United Rentals

Centralized accountability: Individual contributors and direct managers are responsible for feedback

In centralized accountability, individual contributors and junior leaders – more specifically frontline or direct managers – play a significant role in sharing and responding to feedback (see Figure 14).

Figure 14: Centralized accountability for experience feedback



Source: RedThread Research, 2019.



For experience efforts to work, individual contributors, especially those on the frontlines, must share meaningful feedback. In fact, individual contributors in progressive organizations share feedback frequently and effectively in a variety of ways (e.g., surveys, team huddles, one-on-one conversations). They also serve as mediators of information between what they hear from customers and the organization. They shed light on what truly matters to customers and to them as employees.

“The relationship between frontline facing employees and customers is so important. I call it contagious: how they feel and how they show up translates to the customer experience.”

– **Chris Albertson**, SVP Client Feedback and Experience, LPL Financial

We also found that feedback (from both employees and customers) plays a key role in experience if direct managers do something about it. Thus, direct managers are also accountable at the local level. In progressive organizations, they are highly responsive to both employee and customer feedback. Responsive managers actively seek to understand feedback and react quickly and effectively to it. They enjoy ample decision-making rights to address issues as they come up. They also have the authority to rally employees and make decisions.

Responsive managers actively seek to understand feedback and react quickly and effectively to it. They enjoy ample decision-making rights to address issues as they come up. They also have the authority to rally employees and make decisions.

We’re starting to get away from the outdated notion that HR – and the company – will drive your career trajectory. Rather, we create a framework within which you can do great work and learn. Our biggest commitment to our employees is to ensure the business thrives and thus the work will always be interesting and challenging.”

– **Andrea Robb**, VP of Talent, Culture, and Diversity, Autodesk

For example, in a prior job working for a retail bank, Chris Albertson, SVP client feedback and experience at LPL Financial, recalled how direct managers remained responsive to feedback. They would host daily morning team huddles before opening the branch. This was an opportunity for branch managers to review feedback received from customers and listen to employees’ perspectives. Managers used

“voice of the client” scores from the previous day to recognize top performers, discuss challenges, and plan for the upcoming day.

In his current role at LPL Financial, an independent broker-dealer financial advisory firm with over 16,000 advisors, more than 4,000 employees and over \$706 billion in assets, Chris mentioned that they are building a transactional (interaction) experience survey in which both employees and customers can provide input. As they build it, they are keeping responsiveness and feedback-sharing in mind. The goal is to capture employee and customer experience feedback to understand differences and similarities, and to empower managers to make effective decisions.

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Company Spotlight: Workday

Workday is a provider of enterprise cloud applications for finance, HR, and planning. Since it was founded in 2005, it has maintained a clear objective: to create a remarkable Workday experience for customers, colleagues, candidates, and communities.

One of the ways Workday set out to accomplish this objective, was by pivoting 100% to what it can control— the employee experience. And with that pivot, the company developed accountability mechanisms.

At the local level, Workday pushed the point of action and accountability as far out as possible. Its first line of defense, and the most important consumers of employee experience data, are people leaders. People leaders are accountable for creating the conditions for success.

When describing the role of people leaders in employee experience, Greg Pryor, senior VP of people and performance evangelist at Workday said, “If every lifeguard looks after the swimmers in front of them, then the beach is safe.”

Through “Feedback Friday,” Workday collects employee feedback through two questions that take approximately 15

seconds to answer. This information helps to understand the current state of employee experience at the local level.

All people leaders have access to a running dashboard, which displays a measure of their progress and areas to improve, an indication of their employees' experience level, and the top three focus areas that should improve their employees' experience. The dashboard is refreshed every two weeks with "Feedback Friday" data – as long as they received at least three responses from their team to ensure confidentiality – and is available at all times.

At the systemic level, "Feedback Friday" provides an organization-wide temperature check on employee experience. One of Workday's key results is that 85% of employees must have a 4 or 5 level of experience. Each manager of managers gets access to their direct reports' employee experience data, which creates additional accountability. Thus, senior leaders get an aggregate view into what's happening in the organization, where they can improve the overall employee experience, and where they can make programmatic companywide investments.

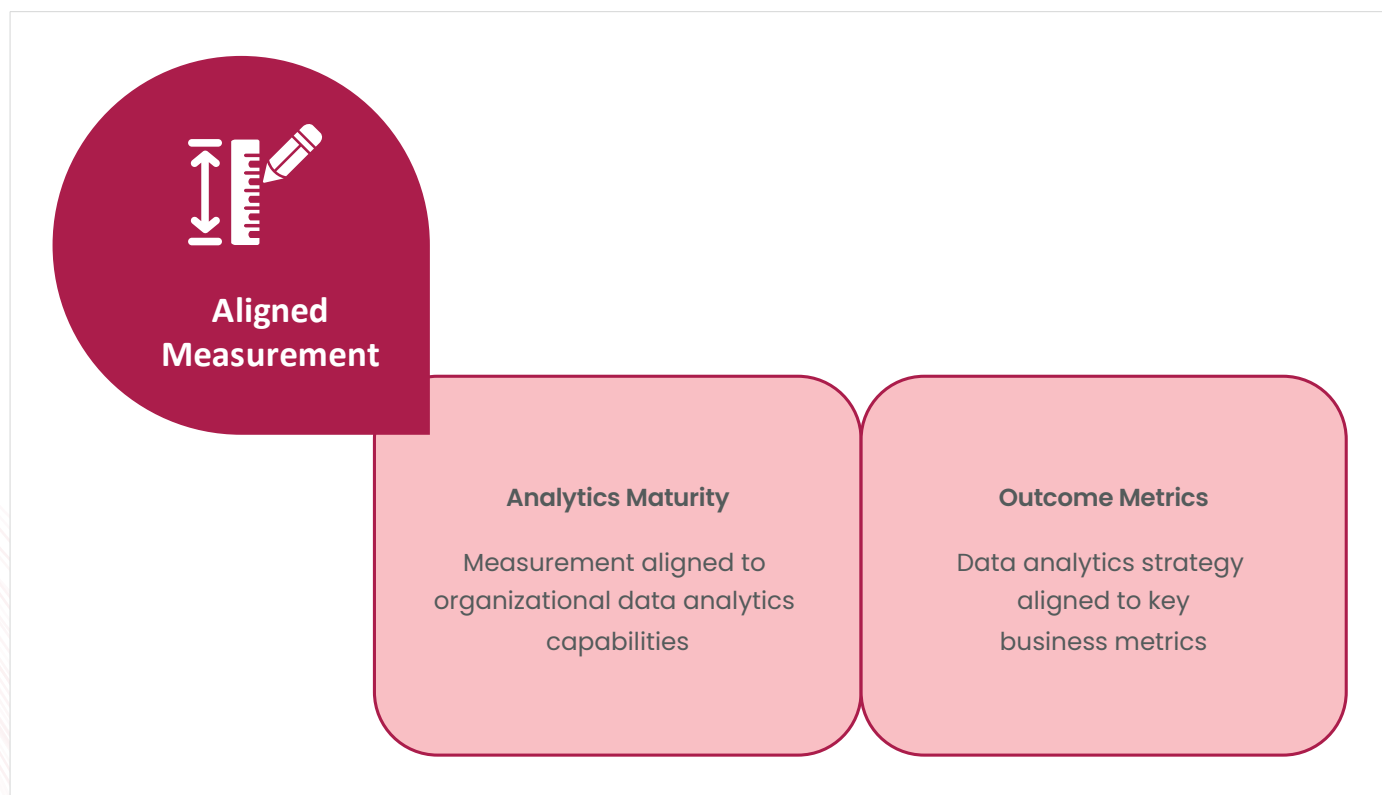
Within employee experience, "we've, by design, taken the opposite approach [to employee engagement] by getting the most frequent and granular information to each specific people leader and then, in broader strokes, managing the information at higher levels within the organization," mentioned Greg.

With clear accountability mechanisms in place, Workday has improved employee experience, reduced employee turnover, sustained a 98% customer satisfaction, and doubled their stock price. They have accomplished all of this within the context of a fast-growing company.

Lever 4: Aligned Measurement

Most of us know the old, yet wise, saying: “what gets measured is what gets done.” This saying holds true especially for employee experience in that organizations’ measurement approach – and their relative level of sophistication – can not only dictate what they know about employee experience but also how they bring it to life. This is why it is especially critical to have an aligned measurement approach. In our conversations, two themes of an aligned measurement approach rose to the surface (see Figure 15) and we explain them in detail in the sections below.

Figure 15: Components of an aligned measurement approach to employee experience



Source: RedThread Research, 2019.

Analytics maturity: Employee experience measurement aligned to data analytics capabilities

Our research revealed that many organizations decide how to approach employee experience based on the sophistication of their people analytics capabilities (see Figure 16). Taking a close look at organizational capabilities to measure and analyze employee experience can certainly save a lot of headaches.

Many organizations decide how to approach employee experience based on the sophistication of their people analytics capabilities.

Figure 16: Immature vs. mature data analytics approach to employee experience

IMMATURE ANALYTICS CAPABILITIES	MATURE ANALYTICS CAPABILITIES
<p>Organizations typically:</p> <ul style="list-style-type: none">• Use existing analytical frameworks (off-the-shelf)• Collect targeted data on specific employee experience interactions• Run employee experience efforts mostly outside of people analytics	<p>Organizations typically:</p> <ul style="list-style-type: none">• Create custom employee experience models based on existing data• Collect a broad range of data using a variety of techniques (active and passive collection)• Combine employee experience expertise with people analytics team's capabilities

Source: RedThread Research, 2019.

Immature data analytics capabilities: Use a prescriptive measurement approach

At first, organizations with immature people analytics capabilities often struggle to figure out how to measure and analyze employee experience data. Our research showed that leaders at these types of organizations were more likely to rely on a prebuilt employee experience measurement model¹⁸ and to measure experience using pre-established experience definitions. This prescriptive approach can be extremely effective in helping organizations get started quickly. These existing models are effective across a large number of organizations and can help leaders get quick access to relevant and actionable insights.

When using a prebuilt model, organizations typically ascribe to the particular “moments that matter” or “touchpoints” perspective of

¹⁸ See Appendix for examples of different frameworks.

the vendor with whom they partnered. When organizations pursue this path, they should consider if the prebuilt model extends to their specific organization or if there are particular “touchpoints” they need to add or remove. Given our perspective that employee experience is about both the emotionally laden events (which are often touchpoints) and everyday exchanges, we encourage leaders to ensure that their approach also accounts for measuring people’s perspectives across the board, not just at specific touchpoints.

Finally, these organizations often assign measurement and analytics to the wider HR function which may have minimal analytics expertise. In cases where they have a people analytics team but opt to bring in external resources, we also find that these organizations may run their employee experience efforts without the substantial involvement of their people analytics team. This can be tempting (and sometimes more expeditious in the short-term) to jump-start an employee experience effort. However, we also encourage organizations to bring along their people analytics functions as much as possible, as the entire organization will eventually benefit more from an aligned approach.

Mature data analytics capabilities: Use a descriptive measurement approach to determine what matters to employee experience

By contrast, when an organization has a mature people analytics capability, the employee experience and people analytics teams are more likely to partner closely. These teams tend to identify critical outcome metrics (more on those below) and then leverage existing data sources to determine which aspects of employee experience influence those critical metrics.

While this approach does not necessarily reject a “touchpoints” framework, it tends to rely more heavily on interactions that are already measured. As such, it may include interactions beyond those found in a prebuilt measurement model. It may also exclude interactions or touchpoints for which there is not a current measurement need.

The advantage of this type of descriptive approach is that it is a custom-built model for the organization. Thus, it is more likely to

When an organization has a mature people analytics capability, the employee experience and people analytics teams are more likely to partner closely.

influence relevant organizational outcomes (versus a more generic prebuilt model). Further, this type of approach has broad buy-in and is likely more sustainable over time because it takes into account meaningful measures and organizational outcomes. However, this approach can have limitations if touchpoints that could influence employee experience are rejected for measurement simply because data collection methods are not already in place.

ABN AMRO, a Dutch bank with more than 18,000 employees and approximately \$9.3 billion in annual revenue,¹⁹ provides a nice example of an organization that has effectively leveraged its advanced people analytics capability to effectively understand and enable employee experience.

Company Spotlight: ABN AMRO

ABN AMRO is a Dutch bank headquartered in Amsterdam that offers products and services to retail, private, and corporate clients. At the core of their people practices is the notion that happier employees connect to happier customers and a better organization.

With that in mind, ABN AMRO leverages its robust people analytics capabilities to do quicker and more continuous analytics on employee experience. Instead of using existing frameworks to capture data at numerous touchpoints during the employee lifecycle, ABN asks a short set of questions on a monthly basis.

“If you want to listen to your employees, just ask them: Would you recommend our company as an employer? Why or why not? That’s the starting point to find employees’ priorities,” said Patrick Coolen, global head people analytics, strategic workforce planning, and HR survey management at ABN AMRO.

¹⁹ “[ABN AMRO](#),” Owlser, 2019.

Through generic questions, they capture feedback on what matters to employees. But in the background, they can slice and dice the data collected. The people analytics team can connect responses to specific moments that matter or demographics, which provides relevant patterns in what employees are saying of their experience.

ABN measures employee experience from a descriptive perspective and also combines active and passive sources of data (from surveys and transactional systems) for greater value. They only use prescriptive frameworks when it's time to deep-dive into the data to identify specific actions that can improve employee experience for specific people or groups.

"We don't show employees all the possible moments that could matter to them by asking, 'what do you think of this moment and the next;' we just ask them and then make sense of out the data," stated Patrick. By using advanced text mining techniques, the team is able to determine the relevant topics employees are talking about.

Beyond providing advanced people data analytics expertise, Patrick's team also collaborates with process owners and business managers to derive insights from the data, discuss it, and help make informed decisions.

Outcome metrics: Data analytics strategy aligned to relevant business metrics

Even though it may be tricky to quantify employee experience itself, organizations pay close attention to the specific metrics or outcomes they use to measure the success of their employee experience efforts. The most common one we heard in our conversations was employee engagement. This is perhaps because organizations have long used employee engagement as the "be-all and end-all" of people metrics.

However, throughout our research, we learned that in addition to considering employee engagement as an outcome of experience, progressive organizations are also considering other types of

In addition to considering employee engagement as an outcome of experience, progressive organizations are also considering other types of metrics.



metrics. They recognize that employee experience may impact other organizational performance indicators, and as such, they keep an open mind to the metrics they consider as outcomes of employee experience.

“One of the things we do to measure engagement is the Organizational Health Index (OHI) survey. This is a comprehensive health-check of our company. The outcomes of the OHI survey are used to steer our business decisions and make sure that we’re putting our attention and resources in the right places. To make an analogy, if you want to lose weight, then the practices are exercising, sleeping and eating well. So we measure how healthy we are and then we further seek to understand what is helping us reach our desired weight. Is it because we are exercising or because we are sleeping or eating well?”

– **Luigi Maria Fierro**, Global Head of HR Strategy and Transformation, ING

For example, some progressive organizations may use a net promoter score (NPS),²⁰ a customer satisfaction score (CSAT),²¹ an employee satisfaction score (ESAT),²² or an organizational health index score (OHI)²³ as business outcomes of employee experience (see Figure 17).

20 Defined as an index ranging from -100 to 100 that measures the willingness of customers to recommend a company's products or services to others. Source: “[Net Promoter Score](#),” Medallia, 2019.

21 Defined as a basic measurement of a customer's satisfaction with a brand's product and/or services. Source: “[What is Customer Satisfaction Score \(CSAT\)?](#)” Nicastro, D., CMS Wire, 2018.

22 Defined as a basic measurement of employees' self-reported satisfaction with the business in which they work in addition to the extent that their wants and needs are perceived to have been met by the organization. Source: “[How to Calculate ESAT \(Employee Satisfaction\) and Why it Should Matter to Your Business](#),” Buenaventura, M., Task Us, 2016.

23 Defined as a leading indicator of sustained performance, measuring organizational health relative to a global benchmark. Source: “[Organizational Health Index](#),” McKinsey & Company, 2019.

Figure 17: Example of business metrics considered as outcomes of employee experience efforts



Source: RedThread Research, 2019.

Others are willing, actively searching for, or developing an employee experience index that can measure experience itself and aggregate their most important performance indicators as relevant outcomes of employee experience. In the Appendix, we list out a number of different types of indices that vendors in the market have built to help organizations measure employee experience.

“We hope to be able to marry our employee survey feedback and results with some of our business performance and customer satisfaction data. By comparing different KPIs that we use for the business with employee outcomes, we aim to provide our leaders with key insights to make decisions confidently.”

– **Kate Miller**, Director of Employee Experience, Robert Half

Others are willing, actively searching for, or developing an employee experience index that can measure experience itself and aggregate their most important performance indicators as relevant outcomes of employee experience.

Summary

To summarize, we covered the four levers to a holistic employee experience: a clear philosophy, a supportive culture, an articulated accountability, and an aligned measurement approach.

First, we discussed the importance of outlining a clear philosophy by identifying a target audience and clearly defining employee experience and its relationship to engagement.

Second, we mentioned how a supportive culture is anchored to employee experience, which reinforces five essential behaviors: collaboration, transparency, psychological safety, alignment, and feedback-sharing.

Third, we described two types of accountability: distributed and centralized. In distributed accountability, senior leaders are responsible for developing an experience strategy and addressing large-scale issues. In centralized accountability, individual contributors and direct managers are responsible for sharing and responding to experience feedback.

Finally, we discussed the importance of an aligned measurement approach that depends on an organization's data analytics maturity. We also described how organizations align their data analytics strategy to relevant business metrics and perhaps consider others beyond engagement.

Looking to the Future

Before we end, we want to provide some final insights on where we see the future of this space going. While this report sheds light on some of the original questions we set out to explore, one area remains murkier than we originally hoped: what is the data-driven connection to customer experience? We found lots of anecdotal evidence connecting employee experience to customer experience. In one instance, we even learned of an organization that was able to quantify the employee experience/customer experience link, but results remained within the organization and never made it to the public sphere.

Given what we've learned, we strongly believe that employee and customer experience are linked. However, more research is needed to explicitly quantify that link. We spoke to a number of organizations moving in this direction and believe that company-specific data that shows the strength of the connection between employee experience and customer experience is not too far off in the future.

As employee experience continues to cement its place in organizations, we will also see more blended teams with both employee and customer interests in mind. To reflect a blended employee and customer experience focus internally, organizations will rethink their existing experience silos in which HR handles employee experience feedback and a dedicated customer experience team handles customer feedback.

As the conversation evolves, perhaps experience in itself will be the common denominator that blurs the lines on traditional roles and pushes the envelope to a new way of thinking: an experience mentality that recognizes and properly reflects the notion that "happy employees make happy customers."

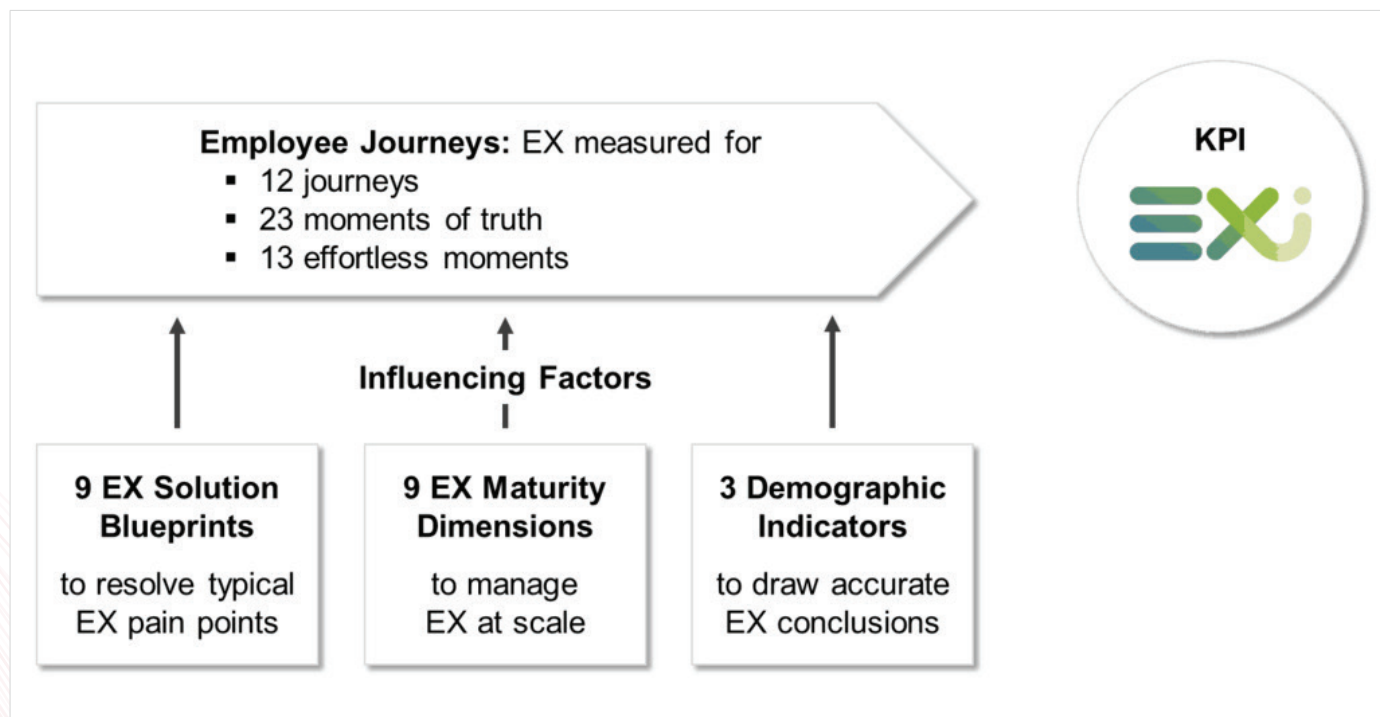
To reflect a blended employee and customer experience focus internally, organizations will rethink their existing experience silos in which HR handles employee experience feedback and a dedicated customer experience team handles customer feedback.

Appendices

Appendix 1: Examples of Employee Experience Measurement Indices

In the course of our research, we found several employee experience frameworks and indices that suggest ways to quantify experience. For example, Volker Jacobs, CEO and founder of TI People, recently shared an employee experience index (EXI©) (see Figure 18), which is a composite index of factors influencing employee experience measured at specific moments and journeys.²⁴ Its goal is to help organizations take a more actionable and targeted approach to employee experience efforts.

Figure 18: TI People's Employee Experience Index

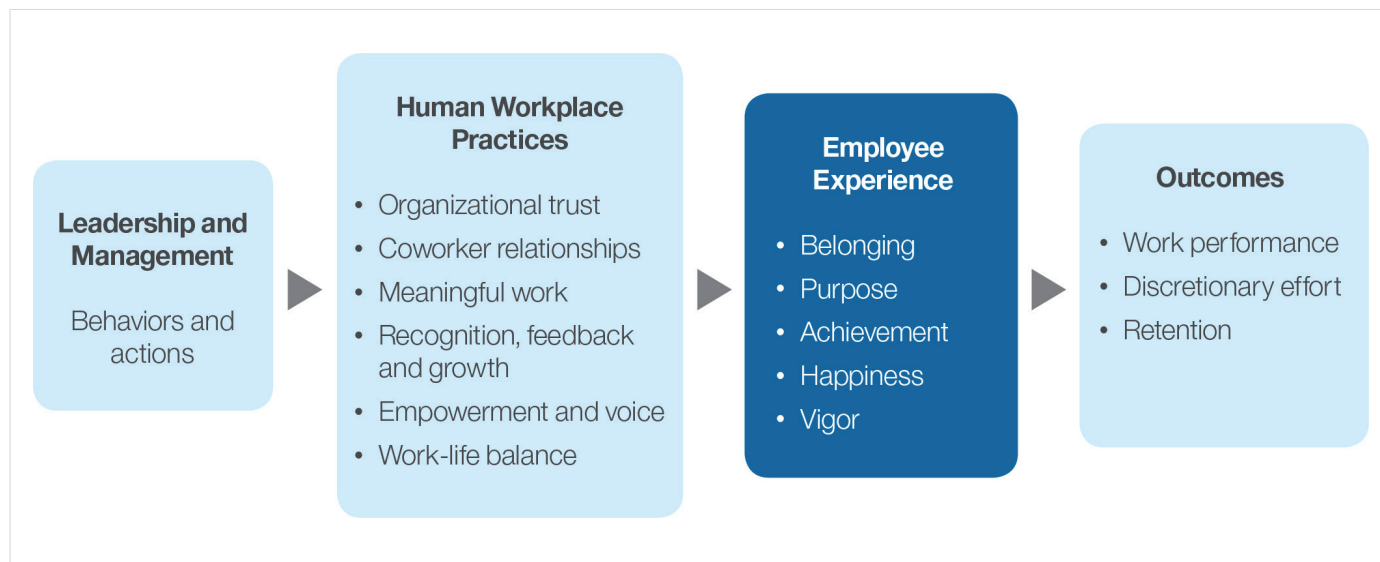


Source: TI People, 2019.

²⁴ "How Do You Create a Culture that Supports Employee Experience?" Jacobs, V., myHRFuture, 2019.

A few years ago, IBM and Globoforce also shared an employee experience index that was the result of a large-scale research study looking at specific factors that reflect employee experience (see Figure 19).²⁵ They described it as a combination of five distinct themes: belonging, purpose, achievement, happiness, and vigor; and then correlated these to three organizational outcomes: work performance, discretionary effort, and retention.

Figure 19: Framework of drivers and outcomes of employee experience at work



Source: IBM & Globoforce, 2016.







There is also Jacob Morgan's Employee Experience Index, which ranks organizations according to their culture, technology, and the physical workspace (see Figure 20).²⁶

We assume there are many other employee experience indices of different colors and flavors out there that we don't mention in this report.

²⁵ "The Employee Experience Index," IBM & Globoforce, 2016.

²⁶ "The Employee Experience Index," Morgan, J., The Future Organization, 2019.

Figure 20: Jacob Morgan's Employee Experience Index

<input type="text" value="Search for Company"/> <input type="button" value="Sort by Category"/> <input type="button" value="Clear"/>				SORT BY:			
				Physical Space MAX: 26	Culture MAX: 70	Technology MAX: 19.5	Overall MAX: 115.5
1		Facebook	EXPERIENTIAL	PHYSICAL SPACE 24.4	CULTURE 63.0	TECHNOLOGY 18.2	OVERALL 105.6
2		Google	EXPERIENTIAL	PHYSICAL SPACE 24.2	CULTURE 63.0	TECHNOLOGY 17.7	OVERALL 104.9
3		Apple	EXPERIENTIAL	PHYSICAL SPACE 24.4	CULTURE 62.2	TECHNOLOGY 18.2	OVERALL 104.8
4		LinkedIn	EXPERIENTIAL	PHYSICAL SPACE 25.2	CULTURE 62.2	TECHNOLOGY 16.6	OVERALL 104.0
5		Ultimate Software	EXPERIENTIAL	PHYSICAL SPACE 23.4	CULTURE 64.4	TECHNOLOGY 16.1	OVERALL 103.9
6		Airbnb	EXPERIENTIAL	PHYSICAL SPACE 23.1	CULTURE 60.2	TECHNOLOGY 16.9	OVERALL 100.2

Source: The Future Organization, 2019.

Appendix 2: Research Methodology

The need for clear, unbiased, and relevant information on employee experience compelled us to embark on this research. With so much hype around this topic, we were curious to find out how organizations think about and approach employee experience in practice. We also hoped to explore its relationship to customer experience and find relevant stories.

In April 2019, we officially kicked off our research by sharing our initial thoughts on employee experience in our [premise article](#). We read over 60 relevant and recent scholarly and business articles, reports, blogs, and books on employee experience. We then published key insights from our [literature review](#) and presented our [initial findings](#) at Experience '19.

This report culminates our research efforts and synthesizes insights from our review of the literature along with the roughly 20 organizations we interviewed to better understand how they think about and approach employee experience.

About the Authors



Stacia Sherman Garr, Co-founder & Principal Analyst

Stacia is a researcher and thought leader on talent management, leadership, D&I, people analytics, and HR technology. A frequent speaker and writer, her work has been featured in *Fortune*, *Forbes*, *The New York Times*, and *The Wall Street Journal* as well as in numerous HR trade publications. Stacia co-founded RedThread Research in 2018, after leading talent and workforce research for eight years at Bersin by Deloitte. Before Bersin, Stacia spent approximately five years conducting research and creating learning content for the Corporate Leadership Council, part of CEB/Gartner. She has an MBA from the University of California, Berkeley, and a master's degree from the London School of Economics.



Karina Freitag, Research Lead

Karina is a Research Leader for RedThread Research. She is passionate about understanding the individual and organizational elements that help people thrive at work. Prior to her work at RedThread, Karina designed talent selection and development solutions and provided talent management expertise on organizational behavior and leadership development. Karina received her Ph.D. and M.A. in Industrial and Organizational Psychology from The Chicago School of Professional Psychology and completed her undergraduate education at Penn State University. She is fluent in Spanish and Portuguese.

