

Employee Activation

The Next Step in Employee Listening



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Introduction

Organizations are undergoing significant change. As companies focus on innovation and productivity, the value of each employee is increasing.¹ And in today's business climate, marked by rapid technological advancements and a scarcity of talent, HR's role has become more critical than ever.

While HR has traditionally focused on employee experience (EX) programs to improve metrics such as engagement and retention, it is increasingly held responsible for generating growth, boosting productivity, and driving innovation.² Our EX research shows that the right practices do, in fact, have a significant influence on these company-level outcomes; leading organizations are 2.2 times more likely to exceed financial targets and 4.3 times more likely to innovate effectively.³

This all starts with employee listening. Consider this story: a bank turned music off in its branches to cut costs; what they didn't realize in doing so was that the silence made customers hesitant to share confidential information with tellers, worried others would hear them. When employees relayed this to management, they expressed that the silence was negatively impacting their ability to do their jobs and having a clear impact on the customer experience (CX). If the bank hadn't given employees the opportunity to share this important feedback or taken it seriously, management may never have known this cost-cutting measure was costing them considerably.

Another example is from a T-Mobile store in Hawaii. Customers were frequently entering the store directly from the beach, dripping water and creating a slip-and-fall hazard for staff and other customers. Luckily, T-Mobile had a system in place for capturing employee ideas and, based on frontline recommendations, installed a sign that reads, "No shirt, no shoes, no service." This isn't something someone in the headquarters or corporate office could have known without local insight from those directly in the store.

Stories like these are an important reminder that employees often hold the knowledge that can make or break an

organization's ability to create experiences that deliver on its brand promise. Simply listening to employees and creating action plans to improve EX are table stakes; advanced organizations use listening to unlock ideas from the heart of the business and take actions that drive real business impact. In turn, when employees feel heard and recognized, they feel more connected and committed to the organization's mission and vision.

We call this next-generation system of listening "employee activation." In this report, we introduce the concept of employee activation, discuss why it's so critical today, and explore some ways organizations can benefit from this new approach. We also share examples and stories from organizations that are advancing their own listening practices toward activation and the significant impacts they've seen as a result.

From Listening and Response to Activation

Employee listening has evolved over the past few decades—beginning with point-in-time measurements of employee sentiment, usually through surveys, and moving toward a more continuous approach⁴ (see Figure 1 on the next page). Through this shift, organizations have started to bring in additional signals, or EX data points such as chats and PTO patterns⁵, turning those signals into insights and continuously funneling those insights to stakeholders so they can take action.

Today, the benefits of employee listening go far beyond enhancing employee experience. As demonstrated by the earlier bank example, employees are the face of the organization and often hold the key to ideas and innovations that can elevate the business. The right listening program not only surfaces areas that need to be improved but also can reveal root causes and unlock new ideas and insights that further delight customers, boost productivity, increase revenue, and help organizations fulfill their brand promise to the world.

1 [Irresistible 2023: The Global Conference for HR Leaders and Their Teams, Keynote](#), Josh Bersin/The Josh Bersin Company, 2023.

2 [The Definitive Guide to Human Resources: Systemic HR™](#), Josh Bersin and Kathi Enderes, PhD/The Josh Bersin Company, 2023.

3 [The Definitive Guide: Employee Experience](#), Josh Bersin and Kathi Enderes, PhD/The Josh Bersin Company, 2023.

4 [A New Model for Employee Experience: Continuous Response \(Shortening the Distance from Signal to Action\)](#), Josh Bersin/The Josh Bersin Company, 2020.

5 ["Signals"](#) from Medallia Glossary.

Figure 1: The Evolution of Employee Listening

Annual Engagement Survey	Pulse Surveys with Mobile Access	Intelligent Dashboards and Action Plans	Continuous Response Action Platforms
<ul style="list-style-type: none"> Once per year Focus on management Benchmarked annually Rigid questions asked year after year 	<ul style="list-style-type: none"> Agile surveys as needed Pulse on regular basis Feedback on mobile or apps AI-based action plans Immediate feedback 	<ul style="list-style-type: none"> Many sources of data Dashboards recommend action, deliver nudges, suggestions, and learning or action plans for individuals Now called employee experience 	<ul style="list-style-type: none"> Tied into internal systems with alerts, feedback, cases, and integration with CX systems
Focus on Benchmarking	Focus on Feedback	Focus on Behavior Change	Focus on Action
Survey Technology	Mobile, Easy to Use	Useful Data and Learning	Instrumented Actions and Alerts

Source: The Josh Bersin Company, 2020

To unlock these benefits, listening must continue to evolve. Accessing critical ideas, suggestions, and solutions from employees while applying insights for the greatest business impact requires “employee activation” at every level of the business. Employee activation enables employees to transparently share ideas and insights and empowers key stakeholders to take meaningful action on insights that will move the needle in the right direction.

Employee Activation

“Employee activation” refers to (1) empowering employees across the organization to share obstacles, ideas, suggestions, and solutions in their daily workflow and (2) empowering key stakeholders throughout the organization to uncover insights, localize problem-solving, and take meaningful action in areas that make a positive impact on how the business performs, operates, and delivers on its brand promise to the world.

How does the concept of “activation” expand upon the modern, continuous listening practices we discussed earlier? Employee activation cultivates an environment where employees become catalysts for change and innovation.⁶ Employees can share their voices continuously and in the flow of work. Simultaneously, stakeholders across the organization actively listen in real time, gathering insights, identifying root causes, and taking action to continuously improve and unlock better business outcomes. In Figure 2, we highlight the shifts that

happen in different parts of the listening process when an organization moves to employee activation.

Figure 2: Traditional Listening vs. Employee Activation

	Traditional Listening	Employee Activation
Goal Alignment	HR	Business
Outcomes	Improvements in engagement, retention, and wellbeing	Improvements in productivity, innovation, performance, revenue, and CX
Feedback Capture	Annual engagement and lifecycle surveys	Always-on questions that empower employees to share feedback, ideas, and solutions anytime in the flow of work; surveys triggered at the most critical moments (e.g., new manager, first sale, terminated colleague)
Data Input	Direct: structured surveys	Direct: structured and unstructured surveys Indirect: chat transcripts, support tickets, crowdsourcing, system usage, manager performance
Analysis	Manual, time-consuming	AI-powered, real-time
Democratizing Data	HR and executives cascade insights downward	All employees have access to role-based dashboards with relevant real-time insights
Enabling Action	Action plans	AI-powered suggested actions, collaborative workflows, personalized nudges, alerts and notifications
Action Stakeholders	HR is the accountable stakeholder for action	All employees are empowered to take action to solve problems

Source: The Josh Bersin Company, 2024

⁶ Employee Activation Guide: How to Empower Your People to Solve Challenges & Drive Results, Medallia, 2023.

We can view employee activation as two interconnected components: empowering employees to share feedback and ideas through always-on listening methods and empowering action from stakeholders across all levels of the organization with democratized insights, real-time alerts, personalized nudges, and AI-powered suggested actions. Each side feeds the other, creating what we refer to as an “employee activation system” (see Figure 3).

By using a system of employee activation, organizations can foster a culture of transparency, trust, and inclusion. They can also unlock insights that elevate business outcomes such as increased growth, revenue, and customer loyalty.

How can organizations put these critical components of activation to work? And what does it look like in practice?

Considering modern technology and conversations with organizations on their own activation journeys, let’s dive into some critical areas to start in and discuss how they can support an employee activation strategy that benefits the business, employees, and customers alike.

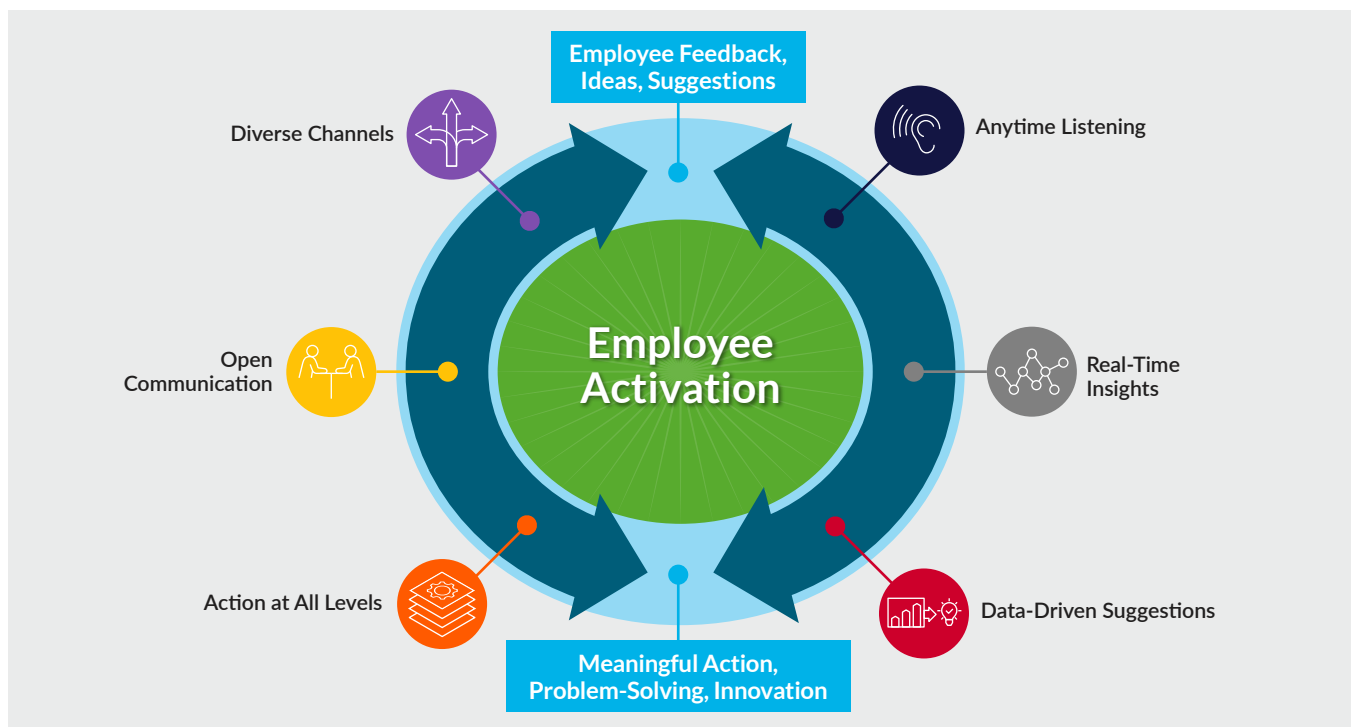
Empowering Your People to Be Catalysts for Change and Innovation

Employee activation begins with empowering every employee to continuously provide constructive feedback and creative solutions for improving everything from frontline operations and product development to internal processes, technology systems, and both EX and CX. To get input from as many employees as possible, organizations must be strategic about where and how they gather input, keeping in mind the unique makeup of the organization and its culture.

Where does your organization stand today when it comes to capturing employee ideas? Does your workplace foster open and transparent communication that enables employees to feel safe and secure speaking up? Are tools, technology, and infrastructure in place to listen at the right times, collect data, and collaborate on problem-solving in real time? Are stakeholders ready to act?

Following are some considerations to help surface employee ideas and feedback that could be key to business success.

Figure 3: Employee Activation System



Source: Medallia and The Josh Bersin Company, 2024

Leverage Diverse Listening Channels

First, activating employees across the entire organization means leveraging inclusive and broad-reaching listening channels. “Channels,” in this case, refer to the delivery or receiving mechanisms that collect employee feedback or signals; this includes both active and passive mechanisms. An example of an active channel for capturing feedback is a pulse survey, whereas a passive channel could be analyzing PTO patterns in the HR information system (HRIS).

Remember that listening and the ability to share should happen within the flow of work. Consider existing tools, systems, live meetings and gatherings, or signals you may already be collecting as you come up with your list of channels. Figure 4 shows examples of channels used for both active and passive listening.

Figure 4: Examples of Listening Channels

Channel Type	Channels
Active/Asynchronous	Surveys, videos, chat forums, crowdsourcing
Active/Conversational	Roundtables, town halls, 1:1s, team meetings, focus groups, interviews
Active/External	Social media, Glassdoor, LinkedIn
Passive/Internal	CRM; HRIS; LMS; HR operations/help tickets, system usage

CRM (candidate relationship management); HRIS (HR information system); LMS (learning management system)

Source: The Josh Bersin Company, 2024

Understanding the right channels to use requires deep knowledge of the workforce composition, the tools and technologies available, and the organizational culture. Employees who work at computers may be able to easily take a desktop survey during the day, whereas frontline employees may need mobile access to that survey or prefer a live meetup to share their experience. Furthermore, asynchronous, anonymized feedback may make more sense for certain topics, while conversational listening might be better for others.

For example, Cencora, a global organization at the center of healthcare, prioritizes open and active listening that spans its distributed workforce, which is located across many different workplaces, including in-office, remote, distribution centers,

and on the road. In addition to surveys, Cencora prioritizes town halls and focus groups as ways to interact with workers, open up a more conversational dialogue, and dig a layer deeper than what survey responses can provide.

A diverse set of channels can ensure an inclusive and comprehensive listening strategy, not only from the standpoint of accessibility but also based on employee preference. By opening up different methods for capturing employee ideas in the flow of work, organizations can tap into the widest number of voices possible.

Create Continuous Touchpoints for Activation

Timing is another important consideration when it comes to activating employees. If we think of the channels to listen from as the “where” or “how,” then the timing or touchpoints are the “when.” These are often moments that occur in the general employee lifecycle, such as 90 days after an employee’s start date, but they do not need to be limited to these arbitrary time periods. What about when an employee first interacts with a specific page on the intranet or perhaps hasn’t logged into the LMS in a while? Sometimes, the less prominent moments are when the best ideas surface. See Figure 5 for some example touchpoints.

Figure 5: Listening Touchpoints

Touchpoint Category	Examples	Audience
Anytime	Obstacle getting in an employee’s way; idea for how something can work better	All employees
Employee Lifecycle Moments	Onboarding; new manager; promotion; returning from parental leave	Specific employees
Company Moments or Milestones	Company merger or acquisition; new CEO	All employees
Technical Moments	First login to a new tool; completion of first project in project management tool; loses a deal in the sales CRM	Specific employees

Source: The Josh Bersin Company, 2024

Leveraging only annual or point-in-time surveys as touchpoints can miss the mark; for example, the team at Pfizer, a leading biopharmaceutical company, expressed the limitation

that annual surveys are often influenced by what happens immediately before the survey is completed, potentially biasing results or not giving the whole picture. Timing listening to be more strategic and continuous—like providing feedback opportunities that are available any time an employee wants to share something or specific dedicated touchpoints within employee workflows—can help avoid some of those biases.

Similar to channels for listening existing in the flow of work, touchpoints should also be ongoing and employee centric. Rather than focusing solely on when HR or leadership wants new feedback and ideas, allow employees to share ideas easily whenever they come to mind or right when a customer interaction happens, which we can't necessarily predict. That's when the innovation really occurs.

Empowering Action-Taking at Every Level

Once employees are empowered to share feedback and ideas in a more continuous and transparent manner, every leader and stakeholder at the organization must be ready to listen, understand, and take action in the right places. In addition to keeping the system going, this action is what drives impact on EX, CX, and business outcomes. Below are a few ways to help activate stakeholders to take meaningful action and make a notable difference.

Design Feedback Mechanisms for Action

While selecting the right channels and touchpoints is important, designing a listening system that promotes action is critical. This includes understanding your audience, asking the right questions, and delegating stakeholders to communicate and own next steps.

Pfizer sets a great example of this. Its People Insights Team is thoughtful about how it words questions to ensure they resonate with the audience. And the purpose of gathering employee feedback is to take action and drive change rather than solely to collect information.

Another important part of designing feedback for action is the share-back of action plans with employees through follow-up. When employees know their input is being taken seriously, they are more likely to continue to share in an ongoing dialogue because they can see the purpose and potential impact of sharing their points of view.

Here are five steps to move beyond traditional listening and focus on action⁷:

- 1. Start with the business problem you need to solve.** Before soliciting feedback directly, consider the problem the organization or team is trying to solve. This will help home in on the right audience, channels, touchpoints, and questions to ask so stakeholders can act on what's uncovered.
- 2. Identify your champions.** Once actionable insights surface, somebody should be responsible, ready, and willing to take action. Stakeholders often are involved even earlier in the process to help develop a specific listening initiative. HR cannot act on employee feedback alone; with employee activation, every employee can be a stakeholder empowered to take action.
- 3. Develop your listening strategy.** With an understanding of your audience and the specific business challenge, select the right mechanism to activate employees. Communicate and design questions in a way that resonates with respondents, encourages responses, and builds trust with your intended audience.
- 4. Get to insights.** Use technology to uncover patterns and trends (see next section). If data or specific feedback requires follow-up, then take that as an opportunity to dig deeper. Direct follow-up through existing team meetings or one-on-ones may enable leaders to uncover root causes and act on those as opposed to guessing at the right solution. If it's an idea or innovation, following up with the employee who shared shows stakeholders value their opinion and can also provide insight into the idea and next steps for implementation.
- 5. Integrate problem-solving and action into regular business routines.** Like listening, taking action and problem-solving should not be one-off activities; they

⁷ [Unlocking Modern Employee Experience: 5 Steps to Go Beyond Traditional Employee Listening](#), Medallia, 2023.

should be incorporated into existing routines and the business culture as a whole. Consider how teams are already brainstorming, collaborating, huddling, and solutioning, and use those times to communicate and incorporate action strategies. This reduces the likelihood of additional work and fosters a culture of ongoing innovation and change at every level of the organization.

Apply Technology to Uncover Insights

Technology enhancements are at the forefront of enabling organizations to uplevel their listening programs. Technology allows us to collect signals and listen through a variety of new channels, making sharing feedback and ideas an option for workers no matter where they are. It also enables us to embed listening into employee workflows and garner real-time data, signals, and insights.

Automation, supported by technology, uses workflows (“if this, then that”) to trigger actions based on either predetermined rules or AI to help determine the action. For example, organizations may be able to automatically trigger surveys or feedback opportunities based on employee behaviors or milestones.

Here are some examples of how technology can be used in listening:

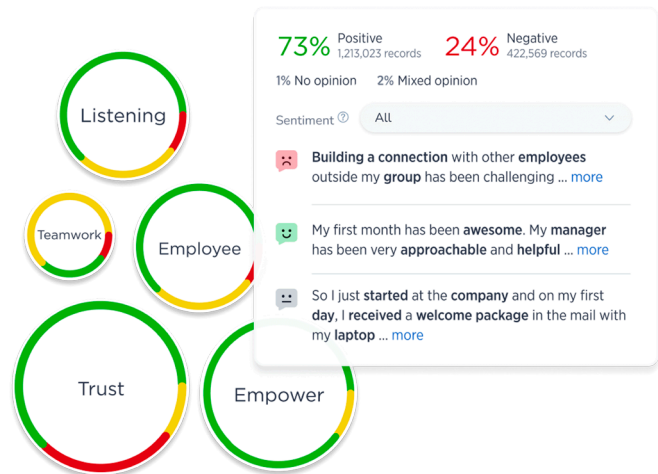
- Trigger listening prompts based on timing or specific employee actions
- Deliver real-time data to managers
- Prompt nudges to take action based on certain signals

A healthy activation system becomes even more powerful with the introduction of AI. Data analysis and prioritizing where action should be taken can be quite time-consuming. AI can help surface trends in real time that may otherwise go unnoticed by leaders.⁸ AI also reads sentiment in written feedback to flag where action may be needed (see Figure 6).

By surfacing patterns more broadly, AI removes silos among different cohorts in the organization. This supports a systemic approach to listening (see next section) and allows for a holistic problem-solving approach. Furthermore, AI can suggest appropriate actions based on trends observed, which can be a shortcut to getting the action step going.

⁸ [Employee Activation Guide: How to Empower Your People to Solve Challenges & Drive Results](#), Medallia, 2023.

Figure 6: AI Identifies Sentiment in Employee Feedback



Source: Medallia, 2024

It's important to remember that these powerful technologies require strong governance and accountability. For example, with data collection and sharing, employees should have transparency into how the data is being used. This helps foster a relationship of trust with employees. Additionally, organizations have to determine how AI will be used at the organization, what level of oversight is required, and who will take responsibility for the technology and its use cases.

Human touch is complementary to technology when it comes to listening. It often is the follow-up conversation that stems from those digital interactions and employee signals that can uncover a root cause to address. Cencora, for example, prioritizes live conversations, including focus groups and town halls, which provide a way to listen more deeply than surveys allow for—and direct action appropriately.

Take a Systemic Approach

Listening can happen across every layer of the business, and unlocking employee segments and stakeholders across many departments can be quite valuable; however, if activation happens in silos, it may create duplicative actions, or teams may operate out of alignment with the overall business strategy.

This is where taking a systemic approach comes in. When silos are removed, the activation strategy aligns around

shared goals, and efforts to maximize outcomes are coordinated.⁹ Simultaneously, it becomes easier to maintain oversight into all of the listening happening across the business, with strong cross-functional involvement in design, execution, and action-taking.

Here's how this can look in an activation cycle:

- HR or a specific team within HR serves as the business owner of the listening strategy and employee listening software or platforms, working cross-functionally with other stakeholders in the organization to design listening programs.
- The owner is responsible for governance and oversight into all listening programs, keeping in mind each employee's listening journeys and helping determine the right channels and touchpoints.
- The owner prioritizes listening programs and actions based on business challenges and potential business impact versus running every survey requested or reacting to every signal that surfaces.
- Accountable stakeholders work to uncover root causes and take action based on those rather than symptoms.
- Efforts are not duplicated across departments, and problem-solving is viewed holistically as much as possible.

Pfizer has a systemic listening strategy, where its People Insights Team serves as system owner and survey orchestrator for the business. When other leaders or managers want to run a survey, the People Insights Team keeps a high-level view on the potential business impact and helps prioritize accordingly. Furthermore, the team ensures clear ownership, action-taking accountability, and involvement from the stakeholder leader or team from end to end.

The key elements to a systemic model for listening are taking a problem-focused approach, removing silos to align around business strategy and enable cross-functional collaboration, taking action on root causes as opposed to symptoms, and prioritizing business impact.

Conclusion

While today's organizations face increasing pressure to perform and adapt, they also are presented with great opportunities. The ideas, solutions, and innovation companies need may exist within their most important asset: their people. To tap into the ingenuity and creativity of their workforce, companies should consider moving to employee activation as their listening strategy. Technology enhances the ability to do this well when coupled with a systemic, people-first approach.

⁹ ["Introducing The Systemic HR™ Initiative,"](#) Josh Bersin/joshbersin.com, December 5, 2023.

Cencora Builds an Inclusive Listening Strategy to Enable Its Mission for Healthier Futures

Cencora, Inc., is a global organization at the center of healthcare, dedicated to creating healthier futures through pharmaceutical distribution, clinical consulting, data analytics, enhanced patient care, and more. Founded in 1871, the organization grew quickly to become one of the largest wholesale drug distributors in the United States, embracing technological innovations to scale and improve patient access.

Today, after tremendous growth and multiple mergers—most recently with Alliance Healthcare in 2021 and PharmaLex in 2023—Cencora has more than 46,000 employees supporting operations globally. Recently, the company rebranded from AmerisourceBergen to Cencora, symbolizing its central role in improving the health of people and animals around the world.

While Cencora sits at the center of healthcare, its people are at its own core and critical to delivering on its mission of improving health outcomes. The HR team at Cencora plays the essential role of attracting, retaining, and developing its people as well as overseeing the organizational culture that allows them to thrive.

A Need to Bring Voices Together

The COVID-19 pandemic brought unique challenges to Cencora, as the company navigated the evolving pharmaceutical supply chain and access to medical care for its customers. At the time, the organization was running point surveys to assess employee wellbeing; between 2019 and 2020, it ran 14 different surveys just from the enterprise level. Without any concrete methodology in place, the HR team risked creating survey fatigue and, while they had some data, it wasn't necessarily designed to be actionable. CHRO Silvana Battaglia reflects, "We had to take a step back and say, you know what, we have to think about the approach to this differently."

In the same time period, the organization was going through a big change—acquiring Alliance Healthcare based in Europe, which expanded its operations globally and doubled its employee base from 20,000 to more than 42,000. "All of a sudden, our workforce demographic changed, and the world around us was changing," said Battaglia. "We had to rethink

the connection we were making with our employees, now becoming a much larger, more global organization." It was essential to embrace the new diversified perspectives the company was gaining, and point-in-time surveys were not going to be enough.

On the search for a new platform that could support a broader listening strategy, Battaglia and her team engaged cross-functional stakeholders such as the customer experience (CX) organization at Cencora to evaluate employee experience (EX) partners. Medallia, a leading enterprise experience management platform designed to turn signals into action, was a natural fit.

Activating Every Employee

Since rolling out Medallia in early 2022, the Cencora HR team's listening strategy has evolved substantially. In addition to improving EX, the goal of the listening strategy is to be able to better support the strategic priorities of the business—by activating every employee. "A really important piece is also to understand from our employees' perspective what they view as important in why they should come here," said Battaglia. "We really use employee voice to help solidify the strategy that we're building to support our business."

And this can't be done in a one-size-fits-all way. The workforce at Cencora is distributed across offices, including its headquarters in Pennsylvania, remote working locations, distribution centers, warehouses, and on the road in commercial services and consulting. The workplace philosophy is around a hybrid model, with principled flexibility wherever it can be offered. "When we surveyed our employee base and asked what's most important to them, 100% of them said flexibility," said Battaglia. And they've taken that feedback to heart—offering more flexibility for roles where it's possible.

In addition to flexibility, inclusion is an important component of both the core values and the listening strategy at Cencora. And that starts with fostering a culture that gives everyone at the organization a voice. This became an even higher priority

with the Alliance Healthcare merger in 2021, when 22,000 new employees across the globe became embedded into the company.

To extend the listening program across its different geographies and demographics, Cencora has incorporated diverse forms of listening that span from passive data points such as leave-of-absence data to targeted surveys to focus groups and town halls, which serve as more of an open dialogue. The team adjusts the format of these depending on employees' ability and accessibility in different work environments. The organization has also experimented with running specific breakout focus groups for different demographic populations represented in the workforce to better surface each group's unique experience and ideas.

Inclusion as a Core Business Priority

In fact, Battaglia and her team, along with the company's Diversity, Equity, and Inclusion Team, have worked directly with Medallia to develop an inclusion index to be better able to monitor inclusion across the organization. The questions in the index address not only the person's feelings of being included in the organization but also their perceived ability to make an impact and whether they feel their voice is being heard or valued in the conversation. The inclusion index is even tied to executive compensation, as it's a business imperative that allows employees to feel they have a way to make an impact on the company's mission.

The index responses are not the end point; rather, they are the impetus for further conversations to understand what's really going on. Based on responses, individual teams may hold focus groups, team meetings, or one-on-one discussions, which allow managers and HR leaders to speak directly with employees and better understand the root cause of their feedback to drive a set of action plans.

Results

Medallia has supported the listening function at Cencora by helping expand listening signals and formats, formulate the right questions, integrate data sources, better interpret data, benchmark itself against similar companies, and partner to inform the overarching strategy wherever needed. They are

also a connective layer between CX and EX, which is an area the team hopes to further correlate and integrate in the future.

So far, expanding and integrating the listening data they have access to, finding unique and inclusive ways of listening, and digging deeper to uncover root causes have all helped Battaglia and her team get a much better picture of the employee experience and where to focus their actions. Additionally, activating employees has provided a vehicle for employees to drive the business strategy through their ideas, experiences, and innovations.

Recent results from the Global Inclusion Index showed 70% inclusion, which is indicative of a highly inclusive culture relative to the benchmarks available. The team has also seen an improvement in its overall experience survey, with a significant increase year over year. The most substantial increase came from the employees formerly at Alliance Healthcare. "Because we've really been doubling down on the integration of that company and the work we've been doing to bring them into Cencora, that was especially satisfying to see that they saw such a marked improvement in their scores," said Battaglia.

Along with improvements in engagement, the organization has seen positive business outcomes. "So, what it's reinforced from us is keep doing what we're doing—the focus groups, the trainings, the toolkits, and the action plans are working," said Battaglia.

Next Steps

As Cencora solidifies its rebranding, it's going to be imperative that the company is able to communicate its brand promise clearly to the world, and that starts with employees. "When you think Cencora, you think of core and center, and that's really because of the role we play in healthcare," said Battaglia. A smooth transition for the internal team brings a better transition for customers as well.

As things continue to evolve not only at Cencora but also in the world around them, including advancements in technological capabilities, Battaglia talks about the importance of being dynamic in their listening approach. She and her team look forward to Medallia continuing to support them in their journey. ■

Pfizer Designs Action-Focused Listening Programs to Fuel Ongoing Innovation

Pfizer Inc. is one of the world's leading biopharmaceutical companies. Headquartered in Manhattan, New York, and founded in 1849, Pfizer now has more than 80,000 employees—or “colleagues,” as they refer to them—globally, with a shared purpose of delivering breakthroughs that change patients' lives. Through collaborations with healthcare providers, governments, and local communities, Pfizer strives to expand access to affordable and reliable healthcare—and its employees are essential to Pfizer's ability to deliver on this promise.

A Need for Better People Insights

During the height of the COVID-19 pandemic, Pfizer began working at an unprecedented pace to develop and deploy its products globally. As the company now works to maintain this new pace, understanding what colleagues need to be successful in this new chapter is critical for Pfizer to be able to fulfill its mission.

In January 2022, the People Insights Team at Pfizer was formed under People Experience (previously HR). With a diverse background in user experience (UX), technology, organizational psychology, and design thinking, this new team set out not only to better uncover colleague insights but also to strategically design a listening program that could turn these insights into impactful actions that enable better outcomes across the business. Listening includes collecting feedback through various methods such as surveys and focus groups, with the goal of improving employee experience (EX).

At the time that the team was formed, Pfizer's listening program was anchored around an annual engagement survey. As Head of People Insights and Analytics Matt Elk expressed, the results of that one survey could be heavily influenced by all sorts of factors happening at that time and not be a full representation of the colleague experience. “It's very point-in-time-driven; what's the climate of the organization? What announcements were made before? What sort of things are happening around that time?” said Elk. “My team and I thought, wouldn't it be great to understand *continuously* what our colleagues are facing and what they're facing at certain moments throughout their career?”

And so began the pursuit to find a solution to support a more ongoing listening strategy. But it was about far more than just listening more frequently—Elk and his team were cognizant of the risk of survey fatigue or, as Director of People Insights Rachel Fudman synonymized, “lack-of-action fatigue.” As a result, the team was equally focused on developing a program that facilitated data-informed action and change across the organization.

Simultaneously, the customer experience (CX) team at Pfizer was seeking a platform to gather better customer insights, so Elk and Fudman's team joined forces with them to find a single solution. “Especially in the customer experience space, where we're all customers now, we're all used to providing some kind of feedback,” said Fudman. “There are places where we can find that analogy to be able to apply those lessons learned from the customer experience space.”

They also saw an opportunity to measure end-to-end impact, from the colleague experience side through to the end user, perhaps a healthcare provider or patient. This fit well with the larger People Experience Team's philosophy that people are at the center of everything the organization does and, by unlocking feedback from colleagues, the team could use those data and insights to create a better experience for customers.

A Listening Program Designed for Action

Pfizer brought on Medallia's experience management platform for customer and colleague listening in early 2022. With the ability to now gather insights from surveys and other feedback in real time, Fudman and her team were up and running quickly. An early opportunity for the team was to gather feedback on the new headquarters office that opened in New York in late 2022. Rather than wait until the office was fully built out, Fudman and her team decided to start measuring the experience as soon as people began going in, so they could continuously improve officegoers' experiences.

“So, what we did is we identified the owners of all the different areas,” said Elk (for example, AV and tech support), so they had stakeholders lined up to act quickly on the feedback. Elk and his team made the case for early and repeated measurement as the new experience unfolded. “We actually changed a lot of our leaders’ thinking, and they supported the continuous nature, which helped to break us out of a report card mindset, because it’s not about just a scorecard, it’s to drive action, to drive change, and to show people that we’re listening.”

Process and Governance

To maintain this action-focused listening strategy, Fudman and her team oversee the orchestration, governance, and process for running a survey in the organization. First, there has to be an evidence-based hypothesis for the area of exploration. “We focus on enterprise level,” said Fudman, meaning something that could be impacting key business outcomes, since her team simply cannot support every initiative a stakeholder may want to undertake. Second, there must be a willingness and readiness to take action on the outcomes and stakeholder involvement from start to finish. This gives the owner responsibility and builds trust with the respondents that their input is being heard. Fudman’s team then brings in design thinking and methodology to create the right questions to activate employee insights and drive actionable responses.

With Medallia, Pfizer has been able to better personalize its listening program through both content and delivery. On the delivery side, implementing single sign-on has given Pfizer the opportunity to send surveys at scale directly from a person such as the CHRO rather than from an impersonal automated email. This alone has resulted in a big uptick in responses and opened a dialogue for direct communication to the sender.

On the content side, Pfizer is focused on personalizing questions from the perspective of the colleague respondent. For example, People Experience has been working on simplifying the process for going on parental leave. To design a survey on this, the team used listening and empathy to understand the target persona and the key parts of their journey first, so the questions were formulated with the end user’s experience in mind. “The feedback people were saying

was, ‘I can tell just based on the questions you’re asking and how you’ve laid this out that you really tried to walk in my shoes and understand the different touchpoints I interacted with,’” said Fudman.

While continuous action-focused listening is at the forefront of Elk and Fudman’s team’s strategy now, they still see value in the annual engagement survey as a larger anchor. “It’s a chance for everybody to share their voice,” says Fudman. “And it gives leaders at all levels data because it’s really a census push.” Since launching their first engagement survey through Medallia in spring of 2023, they’ve already seen a substantially higher response rate than previously.

They’re also able to share data with managers faster than ever before. “It’s much faster than it’s ever been. Just even early insights,” said Elk. “It was like three weeks, and with Medallia we’re at a week and a half, and that’s with People Experience getting a preview,” added Fudman.

Next Steps

Going forward, Elk and Fudman have no shortage of new initiatives planned, including a candidate-experience pilot designed for multiple personas, exploring opportunities around growth and development, and bringing more signals and data from other systems across the employee journey together to understand all aspects of the colleague’s experience.

They’ve also maintained a strong cross-sharing and learning relationship with the CX team—particularly in survey methodology. The future state, as Elk and Fudman expressed, would be uncovering a pain point in the CX journey and being able to tell from the EX data what was really going on beneath the surface. By tying the two data sources together, they have the opportunity to reveal potential root causes impacting customers and act in real time. “We have the foundation and the same platform, and we’re working together. So, we’re closer than we’ve ever been before,” said Fudman.

Through the action-focused, personalized, strategic design of their listening program, the People Insights Team at Pfizer is supporting the company’s core mission to continue delivering innovative health solutions across the globe. ■

Vanguard Enhances Key Employee Experience Touchpoints through Real-Time Listening

The Vanguard Group, Inc., is an industry-leading financial asset management firm headquartered in Malvern, Pennsylvania. Founded in 1975 by John C. Bogle, Vanguard has remained investor-owned by design so it can focus squarely on meeting its clients' investment needs. With approximately 20,000 employees, or "crew," worldwide, Vanguard is committed to helping its team thrive so it can deliver outstanding client outcomes. Vanguard has also been recognized for its commitment to social impact and was most recently named as a 2023 Civic 50 Greater Philadelphia honoree.¹⁰

From Client UX to Crew UX

The team at Vanguard is invested in creating meaningful world-class experiences for its clients through every interaction, whether digital or human. Recognizing the strong link between end-user experience and internal crew experience, the HR organization saw an opportunity to follow similar principles to analyze and enhance crew experience and formed the HR User Experience (UX) Team in 2019. This team was built to focus on delivering a superior digital experience through every employee touchpoint, with HR as its primary "customers"—as those responsible for designing the lifecycle touchpoints—and crew as its "consumers," or end users.

At the time the team was born, there was little data on those crew interactions for HR to act on—nor a system of truth to analyze signals or surface opportunities for improvement. The new HR UX Team decided to spend time with the client experience team to understand what they were doing on the external side and see what they could learn. "Our team believes strategically there's an advantage to doing both employee experience and client experience, and that's been well researched and documented," said Matt Ohlinger, who leads the HR UX Team.

At the core of the client experience team's strategy was Medallia, an experience management platform that captures and analyzes customer signals to enhance their experience. After an introduction and evaluation by the HR UX Team, they

found it to be a great fit for their needs as well and began the implementation process.

A Rollout around Lifecycle Moments

When it came to rolling out the platform, one of the team's first priorities was wrapping its arms around internal case management. "We get somewhere between 65,000 to 70,000 interactions annually from our employees going through HR," said Ohlinger, and each of those interactions provides an opportunity to hear from crew on how they can make that experience better.

Pam Haas, a leader on the HR UX Team, led the rollout and quickly expanded—beginning with "verticals," or key technology integrations for the tools that crew uses in their lifecycle, and then moving onto "horizontals," or the specific journeys supported through those platforms. The HR division has identified more than 20 key journeys, with the HR UX Team partnering with HR center of excellence (CoE) leaders to elevate listening mechanisms on more than half of these journeys. Specific examples of journey moments include candidate experience touchpoints, onboarding, annual trainings, benefits enrollment, and returning from leave, with plans to improve additional prioritized journeys as part of future strategic planning.

What is unique about Vanguard's program is nearly all of its current listening touchpoints are triggered directly from the HR systems crew are already using. An example is a crew member completing a task, such as their benefits enrollment. Once the crew member completes their enrollment, they receive a survey in almost real time to share their feedback about the experience. The HR system integrations with Medallia ensure Vanguard is delivering automated and seamless listening touchpoints at important moments that matter. While the team has embedded listening and feedback opportunities across many different touchpoints, they have been thoughtful about keeping surveys brief and hyperrelevant. "We try to keep our surveys to no more than five questions, but making sure they're very actionable, pointed questions," said Haas.

¹⁰ [Accolades](#), Vanguard, 2023.

Strong Partnerships with Stakeholders

To determine the right moments to prioritize and formulate which questions to ask, HR UX partners across numerous HR CoEs within the organization, such as total rewards, talent management, and learning & development. While each CoE is understandably at a different maturity level with their employee listening strategy, the CoEs are the owners and accountable when it comes to each different aspect of their program and the related employee experience. When Ohlinger and his team engage with the CoEs, they serve as a strategic partner when it comes to methodology, having a bird's eye view of the overarching experience and narrowing the focus on the problem the CoE is trying to solve.

This thoughtful approach has paid off and has been met with positive feedback and excitement from crew members. "Crew members are so excited that we're asking for their opinion," said Haas. Her team is not expecting 100% response rates; rather, it is providing a vehicle for feedback and follow-up at those critical times. "If an employee doesn't want to take the survey, they don't have to take it," Ohlinger explained. Today, they're seeing around a 20% to 25% response rate on most of their surveys, which is in line with expectations.

And Vanguard's employee activation doesn't stop at gathering survey responses. The CoEs who have oversight of the service delivery arm of HR follow up through what they call the "closed loop" process—reaching out to the respondent directly to ensure they're understanding and addressing the crew member's needs. It also mitigates "survey fatigue" or, as Ohlinger calls it, "'lack of action' or 'what did you do with my information fatigue,'" because it involves clear and direct communication and follow-up around the action being taken.

Through its intelligent crew UX strategy, Vanguard's HR organization has much greater insight into key journeys throughout the crew lifecycle. Furthermore, real-time feedback and data allow CoEs to follow up swiftly and address issues as they arise. Today, the team's primary measures of UX

are all variants of a net promoter score (NPS); they are able to measure this both across their verticals, or digital platforms that crew are using, and their horizontals, or the key journeys such as Open Enrollment that crew members are taking.

The HR UX Team has fostered a strong partnership with CoE partners by delivering CoEs actionable data in real time and providing opportunities for direct follow-up based on crew interactions.

Next Steps

As HR UX continues to build on enhancing prioritized crew journeys, there are a few areas the team will focus on in the near future. With all the data HR now has at its fingertips, the HR UX Team would like to support better prioritization around actions for the HR function, so they know where best to focus their resources.

Another goal is to join forces with the Crew Listening Team, a separate function at Vanguard responsible for measuring crew engagement. This team recently implemented Medallia as well and plans to expand listening throughout these common journey touchpoints in partnership with HR UX. Last, they see an opportunity to continue to bridge the connection between crew experience and client experience. "Our aspiration is to find the most important things that we can influence on the crew side that then connect and correlate to the client side," said Ohlinger. HR UX is currently partnering with Medallia on the best path forward to keep homing in on that connection.

Vanguard has made tremendous strides toward embedding and activating an employee listening structure on key journeys and continues to find ways to activate crew feedback and incorporate it into the programs they build in order to enhance crew experience. The strong partnerships that have been built with CoEs have only enhanced the HR UX Program and, with the support of Medallia, Ohlinger and Haas are excited to continue delivering better crew experiences across prioritized interactions. ■

About the Authors



Josh Bersin

Josh founded Bersin & Associates in 2001 to provide research and advisory services focused on corporate learning. He expanded the company's coverage to encompass HR, talent management, talent acquisition, and leadership and became a recognized expert in the talent market. Josh sold the company to Deloitte in 2012 and was a partner in Bersin by Deloitte up until 2018.

In 2019, Josh founded the Josh Bersin Academy, a professional development academy that has become the “home for HR.” In 2020, he put together a team of analysts and advisors who are now working with him to support and guide HR organizations from around the world under the umbrella of The Josh Bersin Company. He is frequently featured in publications such as *Forbes*, *Harvard Business Review*, *HR Executive*, *The Wall Street Journal*, and *CLO Magazine*. He is a popular blogger and has more than 800,000 followers on LinkedIn.



Julia Bersin

Julia is a senior research analyst for The Josh Bersin Company where she studies how businesses are transforming work for the future. Her current research areas include the extended workforce, employee listening and communication, and employee engagement. With an educational background in psychology and math, Julia has spent nearly 10 years working at technology companies—including HR tech enterprises—across various growth stages. She has extensive professional experience managing multifunctional projects and driving marketing and growth strategies. Julia is also passionate about health and wellbeing and brings these areas into both her research and personal life.

The Josh Bersin Company Membership

The Josh Bersin Company provides a wide range of research and advisory services to help HR leaders and professionals tackle the ever-evolving challenges and needs of today's workforce. We cover all topics in HR, talent, and L&D. The Josh Bersin Academy—built on our research and powered by Nomadic Learning—helps HR practitioners grow key foundational skills. Our corporate membership program provides HR teams and senior leaders with the skills, strategies, and insights to build cutting-edge HR and people strategies through a combination of research, assessments, professional development, exclusive events, and community. In 2022, The Josh Bersin Company introduced the Global Workforce Intelligence (GWI) Project to guide market-leading businesses and their leaders through the challenges of industry convergence while remaining future-focused.

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