– [Shari] Hey, and welcome to "PCTY Talks." I'm your host, Shari Simpson. During our time together, we'll stay close to the news and info you need to succeed as an HR pro. And together, we'll explore topics around HR thought leadership, compliance, and real-life HR situations we face every day. Joining me today on the podcast is Mary Kaplan, she is the product marketing manager at LumApps. I'm so excited to have you on the podcast, Mary, thanks for coming.

– [Mary] Thanks so much, yeah, this is exciting.

– [Shari] So, we are gonna be talking all things employee experience today. So I thought we'd start with, when it comes to employee experience mapping, I found that HR can sometimes feel just very overwhelmed by the process. Where do you suggest they start?

– [Mary] It is overwhelming, it's a huge task, and I think the hardest part is just getting started. So, I would say, like so many things in employee experience, don't be afraid to look at the best practices from customer experience. They've invested so much time and money in customer experience that, you know, you can take those best practices and translate them and change them into employee experience. So, I would say, just like we do on customer experience, look at personas, right? So, we have customer personas, I think you should create employee personas or refine the ones that you already have. You can look at criteria like, where they work. Like, in office, hybrid, virtual. You can look at the location that they're in, the job function that they do, what, of course, region, what country that they're in. But again, once you've solidified these personas and they'll be very diverse, then you can really begin to start the mapping, I think. So, you can map that typical life cycle with those moments that matter, which, sure, we'll get to those, those are like such a hot key buzzword, for each of your employee personas. And as you map, look at what each employee's goals might be, their challenges, how you measure success, how they wanna measure success, I would say, during these life cycles. And it's important, it's helpful, you know, as an HR team, we're always checking in through a variety of ways with our employees, we're gathering feedback. And so, those are those face-to-face check-ins, those are those meeting with the manager. Even feedback from surveys or external feedback on Glassdoor. So, you can use all those tools at your disposal. And I would always say, like, start small, right? My favorite rule that I have ever stuck with in the corporate career is 80/20, right? So, if it works 80% of the time, that's what you focus on. You don't have to look at 100, just 80/20. So, that's what I'd say, especially with a big project like this one.

– [Shari] You talked a lot about personas. And even that, I think, can be overwhelming 'cause I think about the few times I've gone down this road personally and done this. And I think you can start too granular when it comes to personas. So, what's your advice on starting to build

those personas in a way that's helpful and that you can iterate on?

— [Mary] Yeah, I think, again, every employee is different. So yeah, you're not gonna have a persona for every single employee. But I think if you can have, you know, a really good cross section of your dozen or so personas, hit at those. Okay, 80% of our employee base match to a decent degree, these dozen personas. I think that's a good goal. And I think, like you said, go back every quarter, every year and refine those personas.

— [Shari] How many personas do organizations typically have? Do you see right around 12?

— [Mary] I would say between 12 and 20. I think more than 20, it's cumbersome.

— [Shari] Right, right. Okay. Moments that matter, yes, it's a buzzword. I think it's something that we've tried to wrap around HR, but you talked about customer experience and it's the same thing when you think about customer experience, it's right, it's touchpoint, it's right. All these touchpoints that happen when it comes to, as you think about moments that matter for employees and then you layer on personas, how do you start to think about identifying the moments that matter in totality and then for each persona?

— [Mary] Yeah, again, really great questions. And I think I do think the moments that matter can be the crux on which you build your maps because they are the life cycle. I really like Gartner's definition, right? So, the moments that matter, they're personal and they're work related, of course, they have significant impact to, potential to impact the employee life cycle, the employee experience, both positively and negatively. And if companies invest in those moments, they get a greater impact, right? Which I think, again, help when you think of this huge project of employee experience taking those moments that matter. So, I would say look at onboarding. You could even look at pre-boarding, like even before they start, promotions, cross boarding, returning from a leave, that's huge, right? Annual reviews, salary negotiations, you know, no, it's not always a fun conversation to do those exit interviews, but those moments that matter people are quite free when they talk usually in those. And I would say one thing that we've noticed that I found really interesting was, you know, a lot of times the employee life cycle is thought of as quite linear. You start off and when you're onboarded, you're super engaged and it drops, drops, drops until you attrit about four years later. But it's really a lot more like a rollercoaster. And those key moments, you can find them in peaks and valleys throughout the employee life cycle. And so I think maybe reframing, you know, the mapping exercise as, it's not necessarily an uphill battle, right? You're not fighting against, you know, this drop in the mountain slope. It's more of like a rollercoaster and that's normal like normal life ebb and flow for your

engagement, for your productivity. But kind of diving in on those moments on the rollercoaster and seeing if that investment would help.

– [Shari] When you go to tackle a project like this, you know, let's say you're listening and you're like, yeah, it's great, we totally need this. I have no clue where to start. What's your advice and how do you start, you know, creating an employee experience map?

– [Mary] I would say to me one of the most exciting things about employee experience in general is it is such a team effort, right? It's not just HR, even though it feels like it falls on their shoulders, it's not. It's this combination between HR, IT, communications, operations. We all have to work together to make employee experience and to have those maps that reflect our company that help us know where we want to invest in the employee experience. So, I would say don't be afraid to work with quite a diverse team or representatives from across the company. And then start with research, right? Your personas are gonna, you'll find them through research, your mapping in general, right? You're gonna talk to your employees, you're gonna talk to managers, and be able to feed that into your whole project. So, start with research, you have your personas and then you can really, and I think also don't be scared that employee experience looks different at maybe every company. I think that's really cool, right? I know at our company we talk a lot about every employee is different, every employee experience is different but it's worth saying every company, you know, what it means to be an employee at this company versus that company is different. That's part of culture. And so do your research but then also make sure you're making it reflective of your, what you want your goals at your company.

– [Shari] I like that you mentioned reflective of goals for your company because I think if you're gonna go down this road of mapping the employee experience, you've gotta have a really good connection between what the exercise is gonna do and what's the output and impact it's gonna have on the business. How have you utilized these maps to have those conversations or to influence the leadership team to move a different direction maybe as you've gone through and identified, you know, moments that matter?

– [Mary] Yeah, I know we worked with one of our customers who's a global auto manufacturer and they wanted to focus specifically on onboarding, right? They wanted to really improve their onboarding given the pandemic, given the Great Resignation. That's where they wanted to invest at the start of their employee journey mapping. And after two years of this investment and improvements in onboarding, they've been able to see that employees can ramp so much quicker. So, from maybe about eight months, you'd cut that by a third and employees are able to be a lot more productive a lot faster. But the HR team, because of the tool that they chose to improve onboarding, the HR team was able to automate more than 50 tasks that they were doing manually

or repetitively. And so they were able to save like two days, man days a year and I think leadership, when you hear stats like that and those kind of ROI, that's when they're like, okay, okay, we'll get behind it.

— [Shari] I think that's a really great example. And it sounds like what they did is they used data from their own experience. What if you're at the beginning of this process and you don't have that data to bring to the table?

— [Mary] Personally, I think this is the hardest challenge because so much rests on data and the data has to be available, has to be clean, it has to be accurate, right? Even when we make personas, even when we want to invest in these digital tools that personalized each, experienced each employee, well, you have to know the employee. And so that, I think that's a big, big challenge. I would say new products are coming on the market. Again, going back to the customer experience world, customer data platforms, you're beginning to see things employee data layers, employee data platforms. But it's this notion that we take your information from your HR system, we take your information from Active Directory or Google or Okta, wherever you have those profile fields and we centralize all of it. So, we wanna make it this complete employee profile from all these different fields you can add onto that actions that your employee takes inside of their internet or inside of their employee experience platform to make a more holistic profile of the employee. But again, that's the data one is hard and that's where it comes I think especially important that it's not just HR, right? Solving this problem has to come from IT as well and operations. So, I don't know if anyone's figured it out. I think that's the key. I mean when it comes to data, it's so sexy and we all want it but then it's like, like, what am I gonna do? Either what am I gonna do with this raw data or this data's not right, you know? So, it's tough.

— [Shari] As you were talking, I was thinking about, you know how we all think our phones are listening to us, right? We'll talk about something and all of a sudden we see ads appearing for different things. Your idea that you just talked about is fascinating because I don't, you're right, the tech isn't there where we're taking that consumer information and laying in our HCM HRAS data on top of it and then exporting a great employee experience. That's gonna be really cool once somebody figures out how to pull that all together.

— [Mary] Yeah, it's, it is gonna be cool.

— [Shari] So, I wanna switch gears a little bit. As you talked about, you know, using this map, how do you balance, you know, the things that you wanna do and the experiences you wanna create but then layer in digital transformation? You know, sometimes I think we get lost in, we have to have these big solutions, right? And sometimes it might be

something as simple as, hey, instead of sending 25 emails to a person in onboarding, send five.

- Yeah.

- [Shari] So, like how do you bridge the those gaps when you're having those conversations?

- [Mary] I think our world of work, it's gotten more complicated. It hasn't gotten easier with the more tools that we use. Even though every project starts with we're gonna make it easier. It's like you add another tool in the mix and then it's just, I know personally there's like seven ways to get ahold of me at work, seven at least. And so it's complicated, but again, I think and don't try to feel like you have to boil the ocean, 80/20, if you really wanna focus on onboarding, I think that's amazing. Your metric is, you know, we wanna make sure that people are really understanding what it means to be an employee at our company and what it means to get started. And maybe that doesn't take 25 emails, maybe it takes one email, one Slack notification, one, you know, YouTube video sent to them inside of their newsletter or something like that. There's ways we get creative and I don't wanna keep harping on the customer experience, but if we only sent, in a marketing team only sent emails, we'd be fired, right? So, we have to think about the experience of that person, that employee getting the message right? And it's like use the best of your digital tools without being overwhelming.

- [Shari] It puts HR in a really unique position to wear multiple hats and I've talked about this before on the podcast about, you know, we've moved in the HR space from tactical administrators to marketers to psychologists to now we're employee experience curators. And I think there is a piece that we have to understand about customer marketing to make really great employee experience. You know, when you're talking to HR professionals and they're going down this road of creating an experience framework, what are some of the top, you know, top three, top bottom tips for like, hey you gotta get these right and these are the things that you have to avoid?

- [Mary] I would say number one, know your end game and this kind of goes back to what we were saying, employee experience at each company can look different. I think that's beautiful and I think that makes sense and that is my favorite thing about my job today is working with our different customers and just seeing how each one of them uses our product differently because that's how they want to involve their employees differently. So for some it might be, you know, we have these amazing strategic initiatives that only one section of our employees are really involved in because they're the ones who came in the office or come back in the office but if we can put these initiatives like diversity and inclusion online and make it more accessible, again employee experience for that portion of it becomes

open and better to do. I would also say like we've talked about, always revisit, refine, and adjust. I'm someone who will literally write something down on my to-do list that I've already done so I can check it off, my husband makes fun of me. But it's like when you have these huge projects, you know, it's gonna feel like, oh, it's never done. Employee experience is never done. Refine, optimizing employee experience is never done. So, make a way for you to be able to chunk it off and cross things off your do list with also always adding to your to-do list, come back and refine. And then I would say celebrate your success, right? Like, and communicate it. If you have optimized a certain part of employee experience or you're starting to then let all employees know, right? Even if it doesn't directly affect your team in Texas, even if it doesn't affect, you know, the ones in the office because you're working with frontline for specific project. Celebrate your success and communicate it because it shows all your employees the investment that you've put in to your employees at your company.

- [Shari] Anything you would say to absolutely avoid or you know things that people have done that you're like, man, I wish I really gotten ahead of you and been able to share like, don't approach it that way, approach it this way.

- [Mary] I would say you don't always need another tool. Like it doesn't always call for necessarily this massive digital investment. You probably have somewhere in your company that the tool might already exist and maybe you haven't used it that way or maybe it's with a different department. So, don't necessarily think you have to rip and replace tools. And I think that's where having a diverse project team will help because maybe HR says, "Okay, we wanna do this." And operation says, "Oh well, we've actually done something kind of like that for our team." And it's then you can say, "Oh, you know, instead of buying a whole new tool, it's actually we're gonna pilot rolling out something we already have."

- [Shari] Data's always been really important for the HR team and I think about the makeup of the teams that have to be tasked with building employee experience and the amount of data that they have to collect and the different views that they need to have. How have you seen those teams designed in the HR space?

- [Mary] Yeah, I think the notion is to really optimize employee experience, we have to have a huge HR team, right? Because like you said, you're tasked with wearing so many hats like people have to get paid, payroll has to get sent out, or else there is no conversation about employee experience. But so, but I don't think you need this huge team and I think that is where digital tools can step in. So, hopefully you find a tool or you've invested in a tool that will help free up time. So again, if you are, when it comes to onboarding manually or semi manually sending out these repetitive calendar invites and emails and trainings and check-ins, can you find a digital

tool that automatically kind of crawls calendars and sets it up for you? That might only save you, you know, 15 minutes. But those 15 minutes add up when you are a 200 person company that grows to 400 in a year and an HR team of five. So, I think you don't have to think, wow, we have to be this massive HR team to work on these huge projects. It really comes down to, like you said, optimizing what you wanna optimize. Looking at those maps knowing where we're gonna start here with our investment. We're gonna start here with the tools that we use, we're gonna iterate and then we'll move on to maybe a next key moment and yeah, I would just say don't let it scare you. It is scary and it feels like it falls on HR's shoulders all the time, but you don't have to have this massive team to get the work done.

– [Shari] Wow, that's really encouraging 'cause I definitely agree. It's a shared responsibility across the organization. So, the more you can tap into those tools, the better. Mary, thank you so much for a few minutes of your time. This was a really great discussion. I'm excited to see, you know, these roles that are based more on employee experience popping up in companies because I think we're moving into a direction where HR is gonna have a little bit more of that marketing hat again.

– [Mary] I think so too. Yeah, thank you.

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