

evive

# Personalizing the Employee Journey

Curating the employee experience  
for better engagement and outcomes



Always treat  
your employees  
exactly as you  
want them  
to treat your  
best customers.

– Stephen R. Covey

**THE PANDEMIC** has had a seismic impact on business, ushering in a new era of remote work, accelerating digital transformation, and unleashing an unprecedented wave of employee resignations. These trends have prompted many employers to reevaluate their business strategies and reprioritize initiatives, so they better align with emerging employee demands and this changing business landscape.

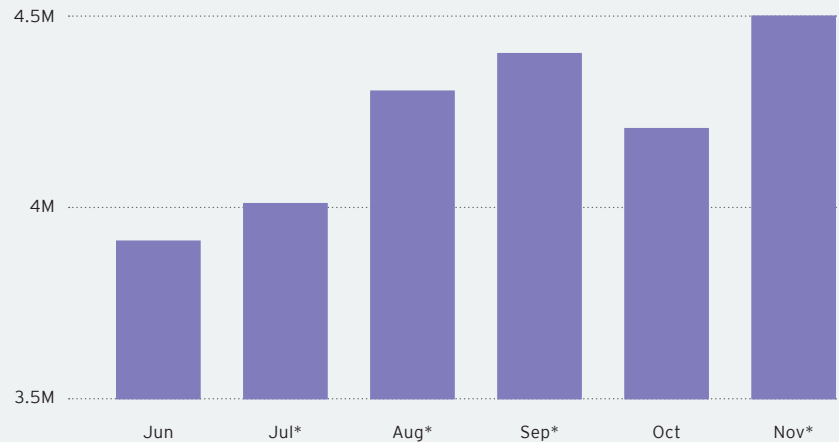
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Employees expect more from their employers than ever before. Beyond a paycheck, they want to work for socially responsible organizations who understand equity, manage through diversity, provide meaningful work, offer flexibility, aid in career growth, and help foster the financial, physical, and emotional well-being of workers.

Employers who measure up are rewarded with a highly engaged workforce, which can mean greater productivity, higher profits, and better employee retention. Employers who fall short may end up with unhappy employees and high turnover—especially now, in the midst of the Great Resignation, with record numbers of employees calling it quits— and data supports this thesis.

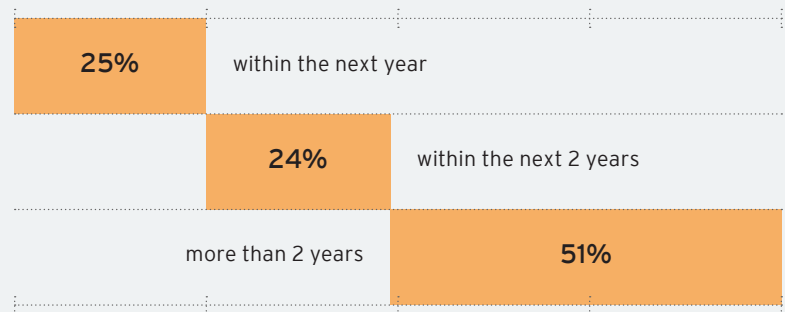
These and other compelling insights were revealed by this broad survey, which polled 500 full-time workers and 500 C-suite/HR leaders on the employee journey, engagement, well-being, and benefits. In this annual report, we'll dig into these survey insights, examine evolving employee expectations, and explore opportunities for organizations to boost engagement throughout the employee journey.

## Employee Quits 2021



Source: U.S. Bureau of Labor Statistics \* record volume

## Employees planning to leave their employer...



Source: Evive's 2021 National Employee Journey Survey

# Driving Employee Engagement

Employee engagement is a measure of how committed employees are to their job, their employer, and their employer's organizational objectives. Among survey respondents, 75% of employees said they're committed to, and connected to, the job they do every day.

However, when asked about their commitment to their employer, that number dropped to 68%. That means that nearly 1 in 3 employees are disengaged from their company, which can spell trouble for a business.

The connection between high-performing companies and a highly engaged workforce has long been understood. But there's also growing awareness of the powerful correlation between high engagement and a personalized employee experience.



## 3 in 4

employees feel committed to, and connected to, the job they do every day.

Nearly

## 1 in 3

employees feel disengaged from their company.

## TAKEAWAY

To maximize engagement, employers need to provide personalized support at each stage of the employee journey, from the moment someone's hired, to the day they walk out the door.

Main drivers of employee engagement include:

- **Aligning organizational objectives with employee goals**
- **Setting clear expectations**
- **Providing necessary development tools**
- **Recognizing employee accomplishments**
- **Offering and encouraging feedback**
- **Giving employees a voice**
- **Building trust with leadership**
- **Supporting employee well-being**

Together, these drivers create a highly engaged workforce. But each one's success depends on effective employee communications.

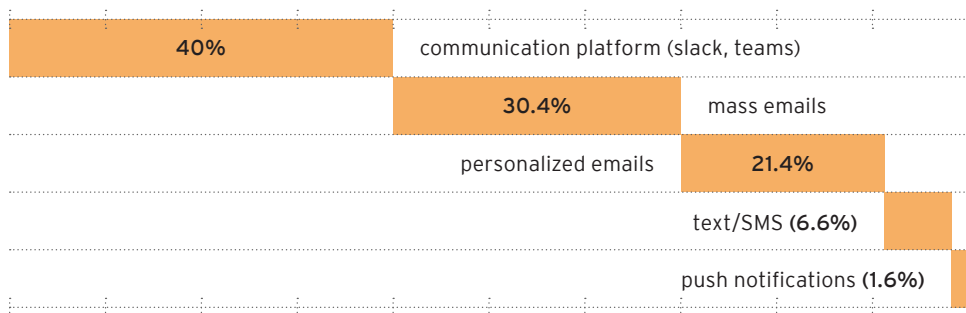


# Creating an Engaging Communication Strategy

As an employer, you may think your communication strategy is getting the job done, but not so fast - it's your employees who'll be the judge of that. Our survey revealed that while 94% of employers felt they communicated well with their employees, only 64% of employees agreed.

Unfortunately, perception gaps like this are all too common, and our survey revealed a troubling pattern of disconnection between employers and employees. These gaps are likely the result of poor communication, a lack of any personalization, or the absence of organizational feedback loops. Either way, these disconnections can negatively impact engagement.

## Employer's primary method of employee communications:



Source: Evive's 2021 National Employee Journey Survey



While

# 94%

of employers felt they communicated well with their employees, only

# 64%

of employees agreed.



The best way to connect with employees is to take a personal approach. If your communications strategy relies primarily on impersonal mass messaging, you've probably set yourself up for failure on the engagement front.

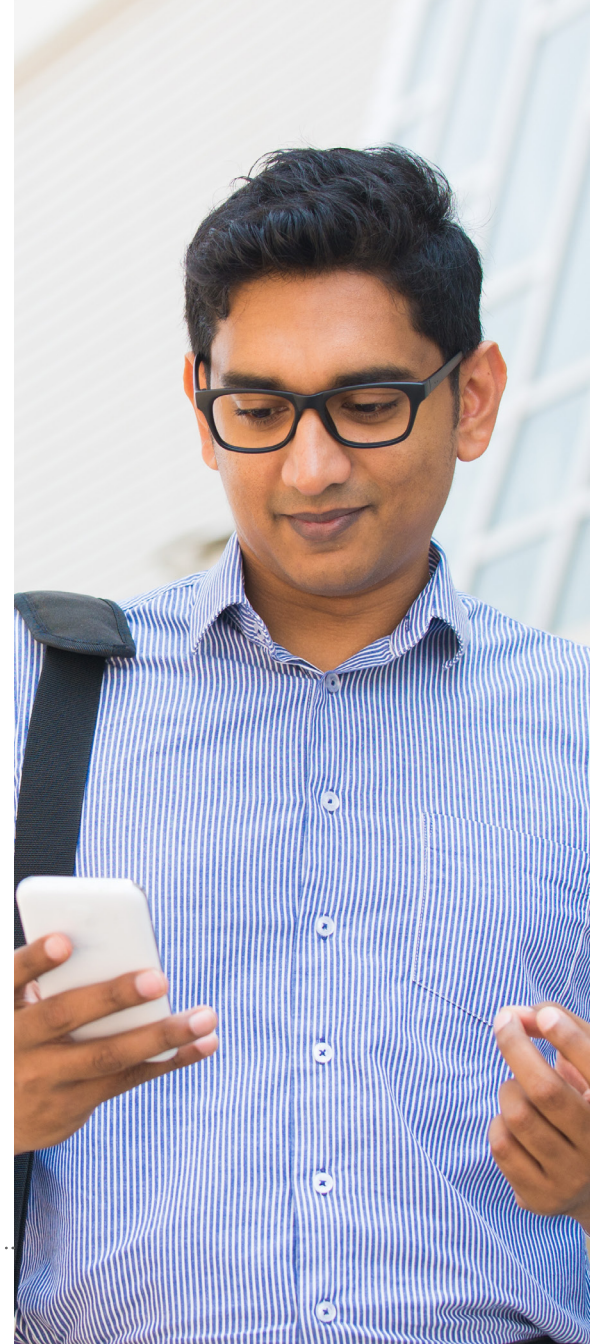
We were troubled to find that nearly a third of employers still rely on mass messaging as their primary method of communications from HR and business leadership.

### TAKEAWAY

Simply put, engagement is about knowing your audience. While only 21% of surveyed employers were currently using personalized messages as a primary method of communication, we predict that personalized communications will continue to rise steeply in

The problem is, mass messaging is typically impersonal, frequently irrelevant, and often ignored by employees. Using personalized, targeted communications on the other hand means that messages are more likely to be read, to resonate, and to inspire employee action (such as clicking a link, completing a task, or providing motivation to reach a goal).

the coming months and years. From consumers who demand it to marketers who leverage it, the age of personalization has arrived, and employers must adopt a more personalized approach to create a highly engaged workforce.



# Gauging the Employee Experience

Whether an employee is a fresh-faced new hire or a seasoned veteran, every employee (and every human, for that matter) craves three things—safety, belonging, and mattering:

- **Safety** - the freedom to take risks and grow
- **Belonging** - equality, shared goals, and being part of a team
- **Mattering** - having a purpose, making a difference, being appreciated, and having perspective that matters

Engagement is fundamentally about forging a connection between employee and employer, and fulfilling these three basic needs in the workplace. For example, do employees believe in the company's purpose? Do they feel their company cares about their well-being?

Do they consider themselves a valued member of the team? We asked employees and employers if their organization's work was something employees could be proud of, and an overwhelming 96% of employers agreed. Among employees, however, that number sank to 72%.

When it came to how an employer's brand value proposition (how the company portrays itself publicly) aligns with the day-to-day values seen by employees, a whopping 97% of employers agreed they align... yet among employees, only 67% felt the same.

Asked whether the company's mission helped every employee feel like they were making a difference,



## 2 in 3

employees agree their company's public brand values align with day-to-day internal values.



94% of employers responded with an emphatic “yes!” but employees were not so sure—only 68% agreed. Finally, when asked about the

importance of diversity, equity and inclusion (DEI) at their company, 96% of employers agreed it was important, as did 77% of employees.

### TAKEAWAY

Employers need to keep a finger on the pulse of how employees are feeling about their company, and their place in it. Failure to do so can give you an overly sunny view of what your employees may be feeling, leaving you unaware of widespread dissension in your rank and file until it’s too late.

This is particularly important as most organizations continue to have some type of remote/hybrid workforce, where the proverbial “water cooler conversations” can’t happen, which often give a pulse of the employee.

Providing continuous communication and opening channels for employee feedback throughout the employee journey can close perception gaps like our survey revealed, and encourage open, honest communication between employees, managers, and senior leadership.

Transparency is particularly important when it comes to DEI initiatives, so communicate often and give employees opportunities to provide feedback and participate in the process.



# Recognizing Employee Contributions

Employees need to feel like the work they do matters, but they also need to feel that others are acknowledging and appreciating their efforts. Most businesses recognize the importance of showing employees appreciation, and among employers surveyed, 93% said they have a system in place for

showing thanks and recognition—with 95% saying their company recognizes employees who perform well. For employees, 62% said their employer had a formal system in place for giving recognition, but just 59% said they received recognition for doing their job well.

## TAKEAWAY

Employers need to create formal channels to encourage peer-to-peer and management thanks and recognition, and make employee appreciation a part of their corporate culture. But a system won't work if it isn't being used. Employers should train managers to regularly provide

feedback and appreciation, and consider automating management reminders to celebrate successes and provide recognition. When employees know they matter, they're more committed to their job, their team, and their employer.



Nearly

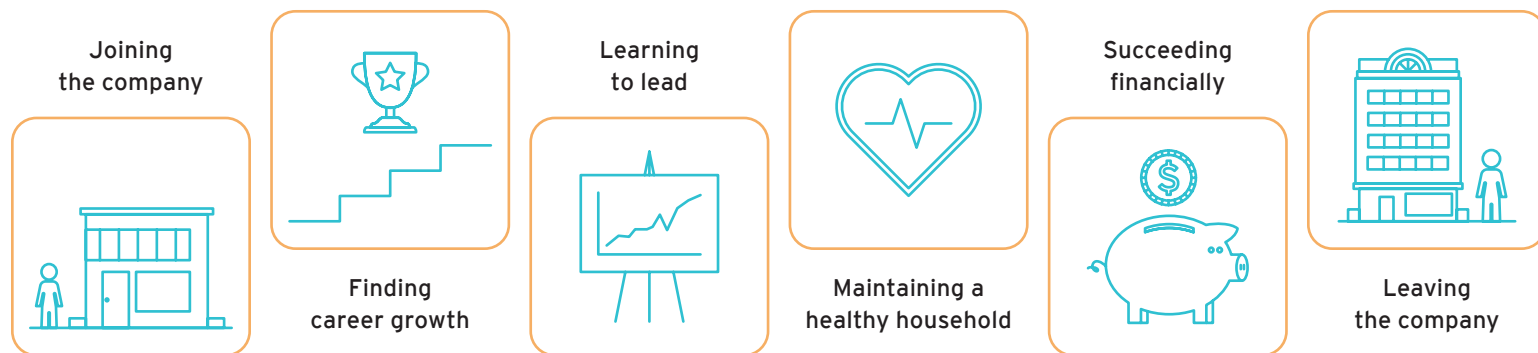
# 6 in 10

employees said they received recognition for doing their job well.

# Measuring Engagement

## Across the Employee Journey

Opportunities to better support employees exist at every stage of the employee journey. Let's examine each one, and identify potential roadblocks to employee engagement.



## Joining the company

Onboarding can be a tricky process to do well, especially with an increasingly remote workforce.

Companies did an impressive job of quickly adapting during the pandemic, however, and 96% of surveyed employers felt their employees were generally satisfied with the orientation experience.

Yet a discrepancy exists, as only 70% of those surveyed were satisfied with onboarding overall, and 69% agreed they had enough time to make benefits decisions.

While two-thirds of employees (65%) felt their orientation was structured, we did learn that HR departments have some work to do to further personalize the onboarding experience.

Just 45% of employees felt the overall process was personalized, and only 47% were introduced by HR to colleagues outside their immediate teams. Even fewer employees, 39%, said that HR checked in on them post-orientation to see how things were going.

All of these results show that companies are missing out on some key opportunities to better connect with their new hires.

Just under

# 1 in 2

employees felt the overall orientation process was personalized. Even fewer (39%) said that HR checked in on them post-orientation.

# 7 in 10

employees were satisfied with onboarding overall. Meanwhile, **96% of employers** feel their orientation is good.

## TAKEAWAY

Even small steps toward personalization can make a big impact on the employee experience, going a long way to make new employees feel welcomed and part of the team. Even before a new hire's first day, begin sharing information like benefit options to give employees plenty of time to determine their needs and be prepared on day one.

Take that extra step to connect with employees on a personal level to improve engagement, loyalty, and advocacy among workers, but take it one step further and foster introductions

at peer levels across the organization to gain throughput on engagement, loyalty and advocacy.

Finally, take the time to survey new hires about their onboarding experiences. Only 39% of employee respondents said they were surveyed about their onboarding experience. Gathering feedback following onboarding can improve the process, and help establish an open dialogue between employees and leadership.



## Finding career growth

Employees have always looked to employers to help grow their careers, but expectations have never been higher from a professional development perspective.

Many employers have met the challenge, offering Learning Management System (LMS) courses and other resources to help employees not only grow the skills for their current job, but also prepare them for the next step in their careers.

Discussions about career aspirations are also becoming a regular part of performance reviews at many companies.

Concerning whether their employers care about their professional development, 62% of employees agreed they did. Among surveyed employers, that number skyrocketed

to 96%. If just two thirds of employees feel their employers have a stake in their career growth, consider this: What would you do if your business lost a third of its workforce? It could have a devastating and lasting impact. Before that happens, make sure your people managers are actively supporting their employees' professional development, and identifying those employees who are interested in leadership opportunities. Separate those who wish to remain individual contributors from those who'd like to pursue management roles, and provide each with the tools they need to develop and grow.

With proper training, your future leaders will be ready to take the next step in their careers when the opportunity comes.

Nearly

# 2 in 3

employees said their employers care about their professional development, while employers themselves surveyed at 96%.



## TAKEAWAY

Engaged employees are shown to have higher productivity and longevity at organizations.

Proactively encouraging and supporting employee career growth is a powerful way to show employees you care, and may help you to avoid the Great Resignation.

Employers will need to prioritize learning and development if they want employees to stay committed to their organization.



## Learning to lead

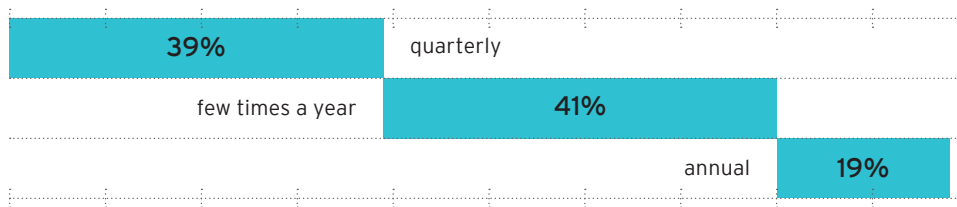
When it comes to leadership opportunities, employees and employers had starkly different responses. Only 51% of employees felt their company offered a clear path for career growth and advancement, yet 90% of employers said their organization provided one for employees. It could be that advancement opportunities truly don't exist for some, or perhaps organizations are doing a poor job of communicating opportunities to their employees. Employers need to equip their potential new leaders with the right tools and skills to lead.

That's why the role of managers in career advancement cannot be understated. They're in the best position to help develop employees, and hone their skills for advancement. Ideally, this is a continuing conversation throughout the year, but at a minimum it should be part of the performance review process. 39% of employers said they expect managers at their company to conduct formal performance reviews quarterly, 41% said a few times a year, and 18% expected annual reviews. Among employees these numbers were lower: 13% said they had a

# 1 in 5

employees feel their manager is not committed to their career growth.

### Employer expectations for managerial performance reviews:



quarterly review, 24% said reviews took place a few times a year, and 44% were reviewed annually - leaving nearly 1 in 5 employees with infrequent or nonexistent performance feedback. Disappointingly,

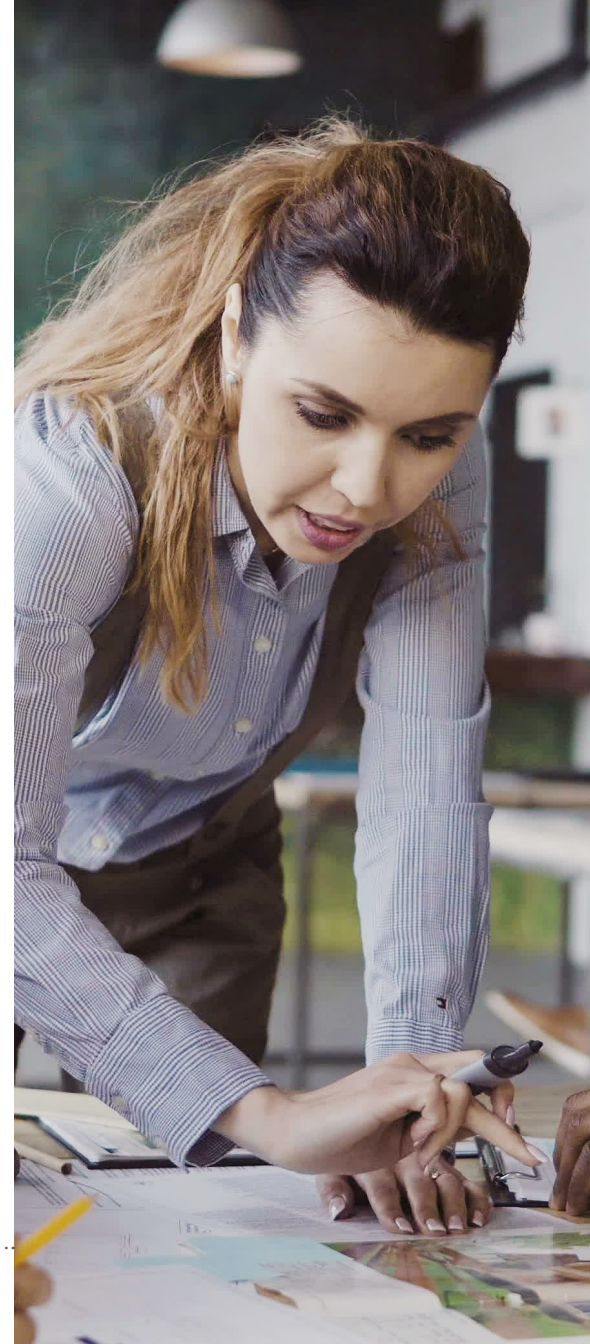
only 62% of employees surveyed felt their manager was committed to their career growth, which could mean that even if professional development is an organizational priority, some managers are dropping the ball.

### TAKEAWAY

While individual professional development is critical, employers also need to make building a leadership pipeline a priority at the organization. It begins with identifying those employees interested in a leadership career path, and then providing ongoing training and resources so that when the day comes for them to step into a leadership role, they'll be ready. Managers also have to remember that no two employees have the same career needs.

Personalizing the experience to ensure that managers are having the right conversations with the right employees is critical. Managers should regularly check in with employees on progress, set concrete objectives and goals to keep them on the right track, and measure ways to identify if a person is ready to advance.

But it doesn't stop there. Managers should have access to ongoing training, and receive regular feedback from both their superiors and their direct reports about how they can improve.



## Maintaining a healthy household

Employee benefits are a crucial part of keeping your workers and their families healthy. Yet benefits are often underutilized because employees don't understand what they are, or whether they apply to them. That's why benefits communication is so critical.

Outreach regarding relevant benefits is vital to improving employees'

health and outcomes, and keeping a company's healthcare costs in check. 95% of employers indicated they were satisfied with their company's current benefits communication strategy, but only 3 out of 4 employees (74%) said the same.

When it came to specific benefits communications, here's what employers and employees had to say:

**7 in 10**

employees offer employee screening reminders, and another 9% were considering them.

62% of employees said these would be helpful.

**1 in 2**

employees offer partner health screening reminders, and an additional 21% were considering them.

51% of employees said these would be helpful.

**3 in 4**

employees give reminders about benefits in emergency situations, and 11% more are thinking about offering these.

79% of employees said they'd find these reminders helpful.

**95%**

of employers indicated they were satisfied with their company's current benefits communication strategy, but only

**74%**

of employees said the same.



## TAKEAWAY

If employers wish to significantly improve employee benefits utilization and engagement, they need a benefits communication strategy that lets people know about relevant benefits at just the right time, because no two employees are the same—so their benefits needs won't be either.

The good news is, today employers can leverage data and analytics to pinpoint, and even predict, exactly when a benefit may be needed by an employee or covered dependent. The right engagement platform will message the individual with information on the benefits to ensure they're being utilized.



# Prioritizing Employee Mental Health

**ONE POSITIVE** to come out of the pandemic is an increased sensitivity among employers to employees' mental health, and how work can impact their overall well-being.

“Burnout” is often cited as one of the reasons so many are quitting their jobs, and employees are reporting record levels of stress at home and on the job.





While 90% of employers reported offering additional mental health and other resources to employees due to the pandemic, just 57% of employees said they agreed. When asked how frequently they experience stress on the job, only 12% of employees said rarely, 16% said several times a week, and 17% said every single day.

Burnout is a pandemic reality, and employers have recently made incredible strides in recognizing and prioritizing employee mental health. Still, our survey revealed that 14% of employers said their employees had to work extra hours or off days several times a week to finish their work, and 7% worked overtime daily.

Among employees, 10% reported working extra hours or off days several times a week, while 5% reported working overtime every day. With 15- 20% of workers consistently working overtime, it's not surprising that burnout is a real threat.

The Great Resignation is creating a vicious cycle, because as resignations increase, the stress on those left behind does as well, cultivating a new crop of burned-out employees. Survey results reflect this, with 71% of employers reporting that a high rate of employee turnover has had a negative effect on their business, and 57% of employees sharing that a high rate of workers quitting has negatively impacted their job.

## TAKEAWAY

Employers need to double down on the mental health resources and benefits they offer employees, and proactively reach out to employees to see if they need help. Train your leaders to regularly meet with employees and ask them how they're feeling, and to be alert for red flags that might indicate an issue. Additionally, personalized communications that educate employees and direct them to available resources ensure that even those who are hesitant to ask for help will have the information they need to help themselves.

## Succeeding financially

Financial health is the final leg of the three-legged stool of employee wellness. Along with physical and emotional health, employees expect their employers to help them better manage finances and save for future expenses like home ownership, tuition, and retirement.

Employees are asking for financial planning benefits, and it's critical to educate employees on the importance of saving to prepare for retirement and other major life expenses. Our survey revealed that 25% of employees believe their total expenses in retirement, such as housing, medical and leisure, will be \$100,000 or less (even though,

on average, Americans retiring at age 65 will need \$1.1 million for a comfortable retirement).

This misconception certainly comes as no surprise. Our data found that financial planning was one of the least frequently offered benefits, with just 15% of employees saying it was an option at their company. Yet it was also one of the most desired benefits of those not offered, with 25% expressing interest in it.

# 1 in 4

employees believe their total expenses in retirement will be \$100,000 or less. On average, retirees at age 65 will need \$1.1M.

Nearly

# 8 in 10

employees said their employer does NOT offer a financial planning benefit.

## TAKEAWAY

Employees need help understanding what their financial benefits are, and how to get the most from them. Beyond planning for retirement and major purchases, many employees need help with day-to-day concerns, like setting and sticking to a budget.

Employers need to consider expanding their financial offering to better educate their employees, so they'll be better positioned to comfortably retire when the time comes. Personalized communications to those who have yet to set up basic things like their 401(k) or HSA help ensure that easy-to-achieve goals are met.



## Leaving the company

Offboarding is often a forgotten step in the employee journey, with many employers treating the process as an afterthought. But the risks from poor offboarding are very real. Failing to comply with COBRA requirements can mean steep regulatory fines, a haphazard process can result in equipment losses and data breaches, and neglecting departing employees can do lasting harm to your reputation.

Among surveyed employers, 86% felt they treated their departing employees well. However, it's alarming that just half (51%) of employees said the same of their employers.

In a world where social media and sites like Glassdoor are used by job seekers to research and evaluate potential employers, businesses

can ill afford to treat departing employees poorly. Past employees are also potential future advocates, so it matters how you treat employees on the way out. Only 43% of employees said they would be an advocate of their current employer after they leave, and 41% were unsure if they would or not.

That uncertainty means lots of opportunity for employers to turn departing employees into advocates, and a good offboarding experience can help.

Consider a personalized approach that invites departing employees to participate in an alumni newsletter or an alumni group of past employees. Keeping a short tether to the organization means employees still know what's going on and can recommend future employees.

About

# 4 in 10

employees feel that they will be an advocate of their current employer after they leave.

# 1 in 2

employees felt they were treated well on departure - far from the 86% of surveyed employers.

They can also become your biggest advocates and promote the organization on social sites.

Automating the process also means critical steps aren't missed, such as sharing COBRA information or obtaining contact information for future payroll activity. But circling back to our earlier conversation, it's also an opportunity to test out

your leadership pipeline and fill the newly opened position with an employee who has been preparing to lead for some time.

### TAKEAWAY

Employers need to formalize their offboarding strategy, and establish a knowledge-sharing plan so the employees who are left behind won't be left in the lurch.

Just as important, make a point of showing departing employees appreciation for

their contributions and years of service. That way, you can create a network of alumni advocates to provide referrals, recommendations, and perhaps even return to the fold one day.



## Need more support for the employee journey?

Check out these additional resources:

[New Hire Survey Toolkit](#)

[Employee Growth + Leadership Toolkit](#)

[Offboarding Checklist](#)

# evive

### About Evive

Evive changes the way companies communicate.

Starting with rich healthcare and HR data sources, we use our proprietary predictive analytics and behavioral science expertise to deliver highly segmented, multi-modal messaging that connects the right person to the right resource at the right time: containing costs and optimizing the employee experience across diverse populations.

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