

Techniques to understand and improve your digital employee experience

Josh Patel, Step Two @j05hpatel





Hi, I'm Josh!

I'm a Senior Consultant at Step Two's Melbourne office.

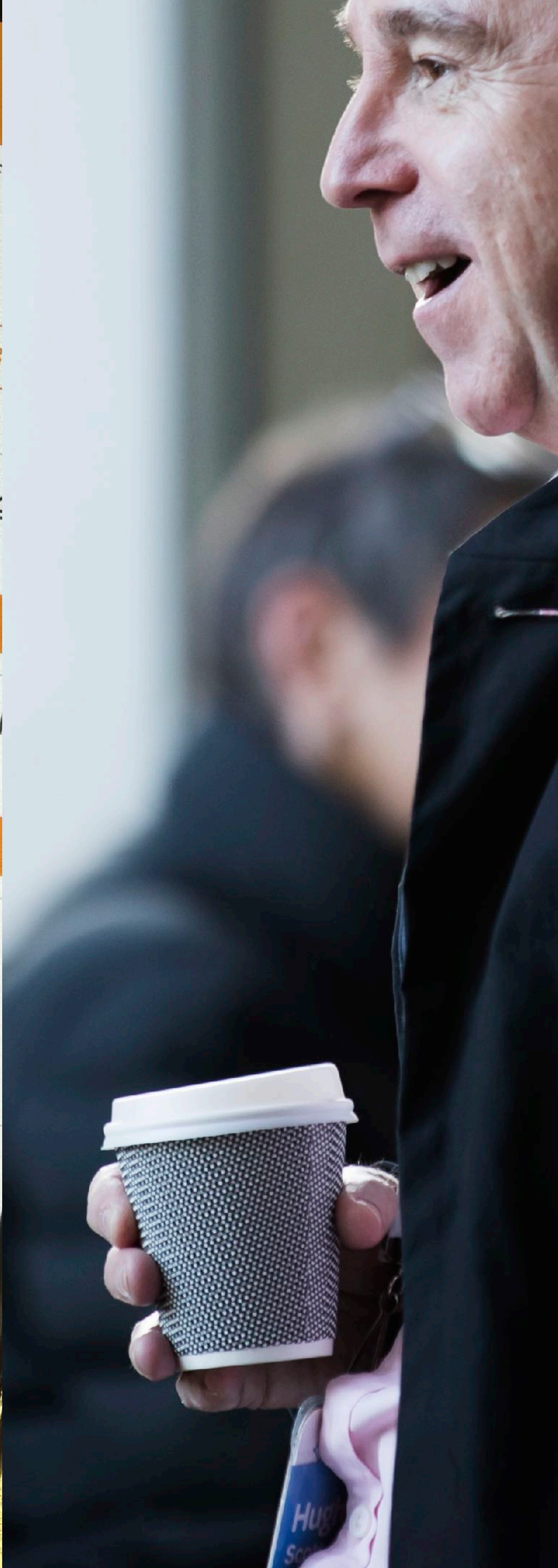
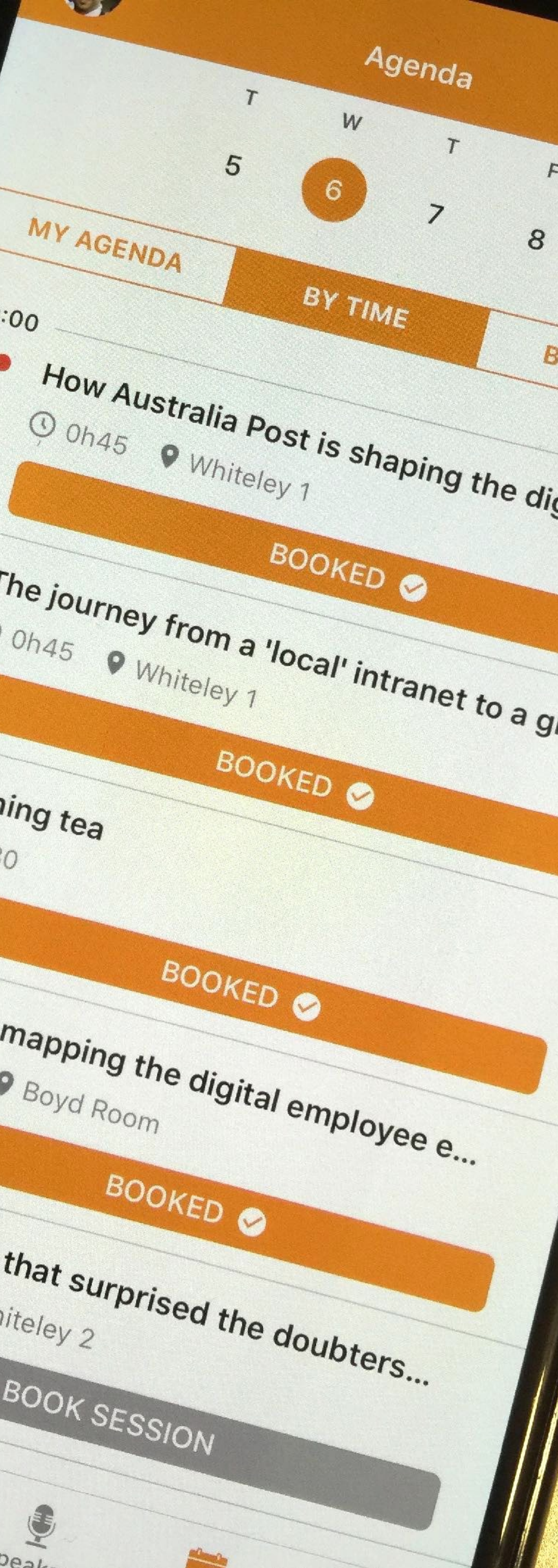
I've been in this space for 13+ years, with experience in health, retail, utilities, financial services and local/federal government.

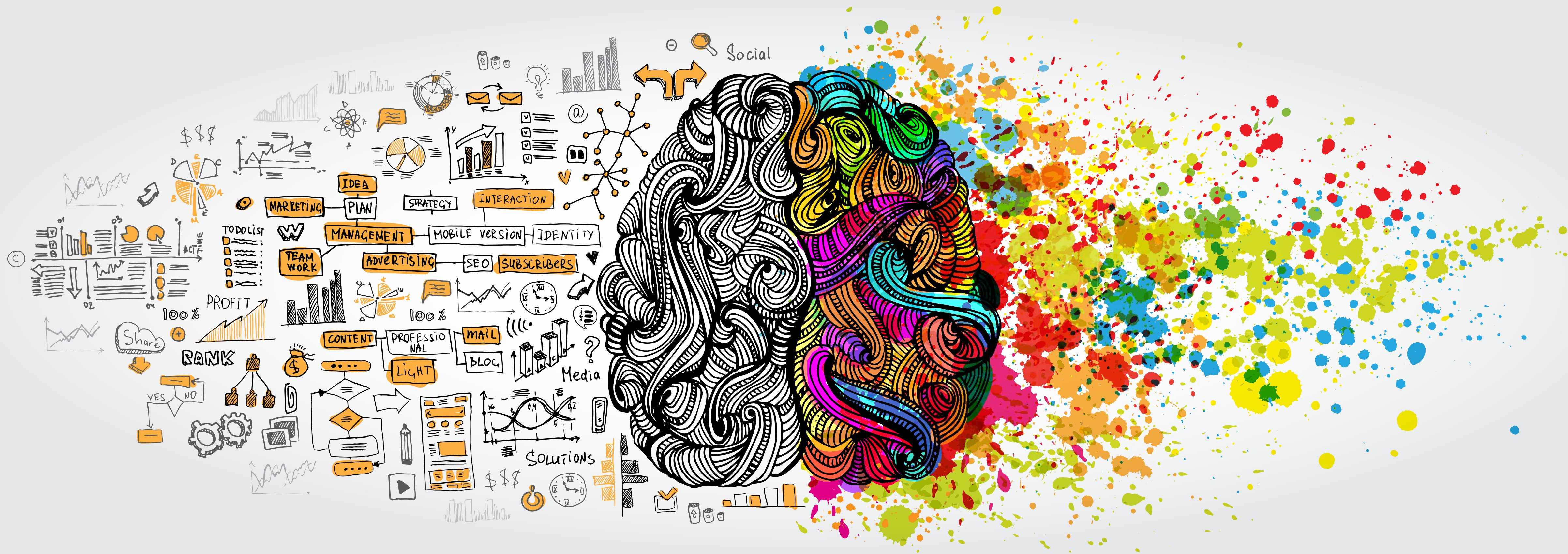
I'm passionate about delivering great digital experiences.



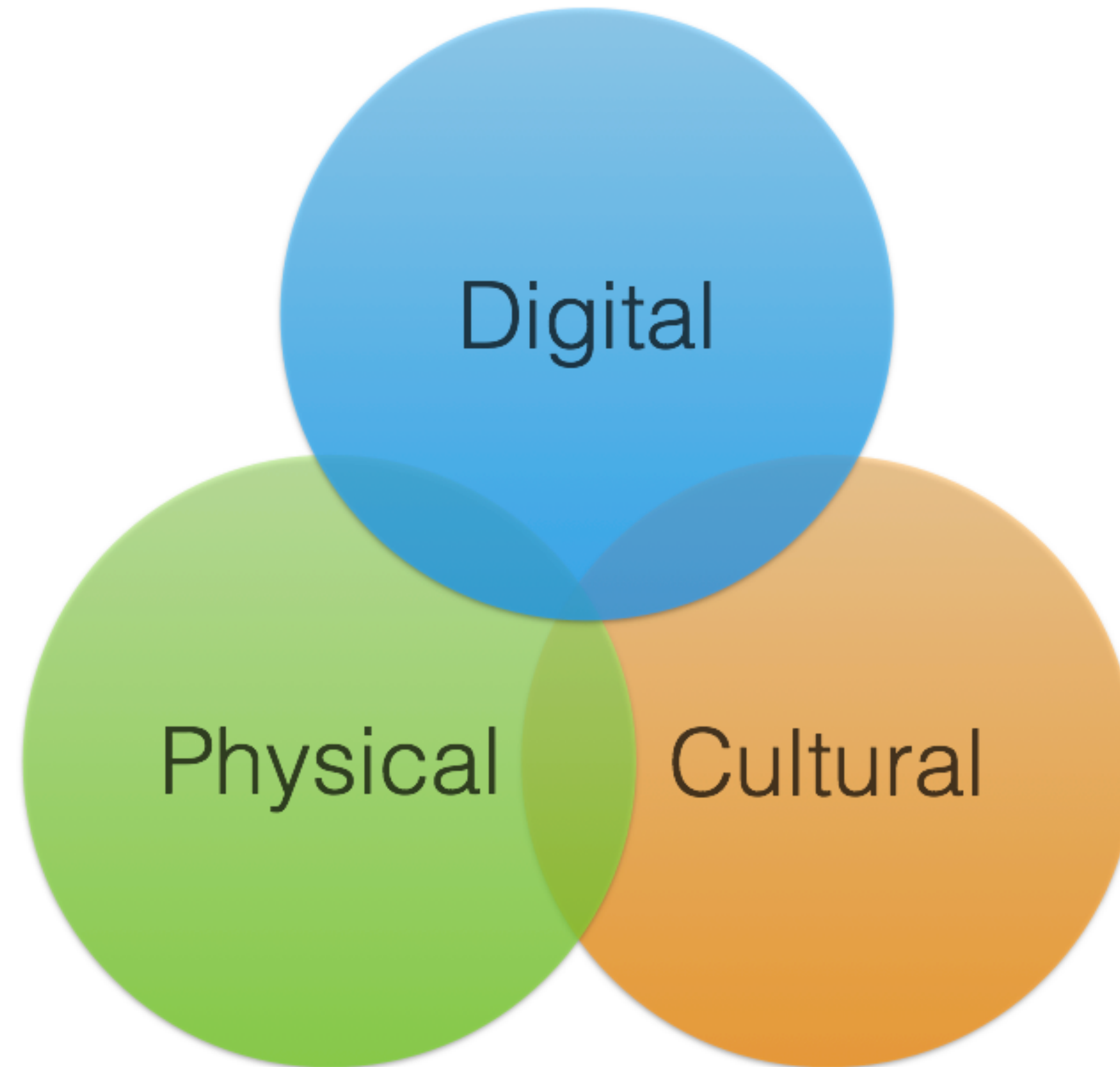


Why are **experiences important?**





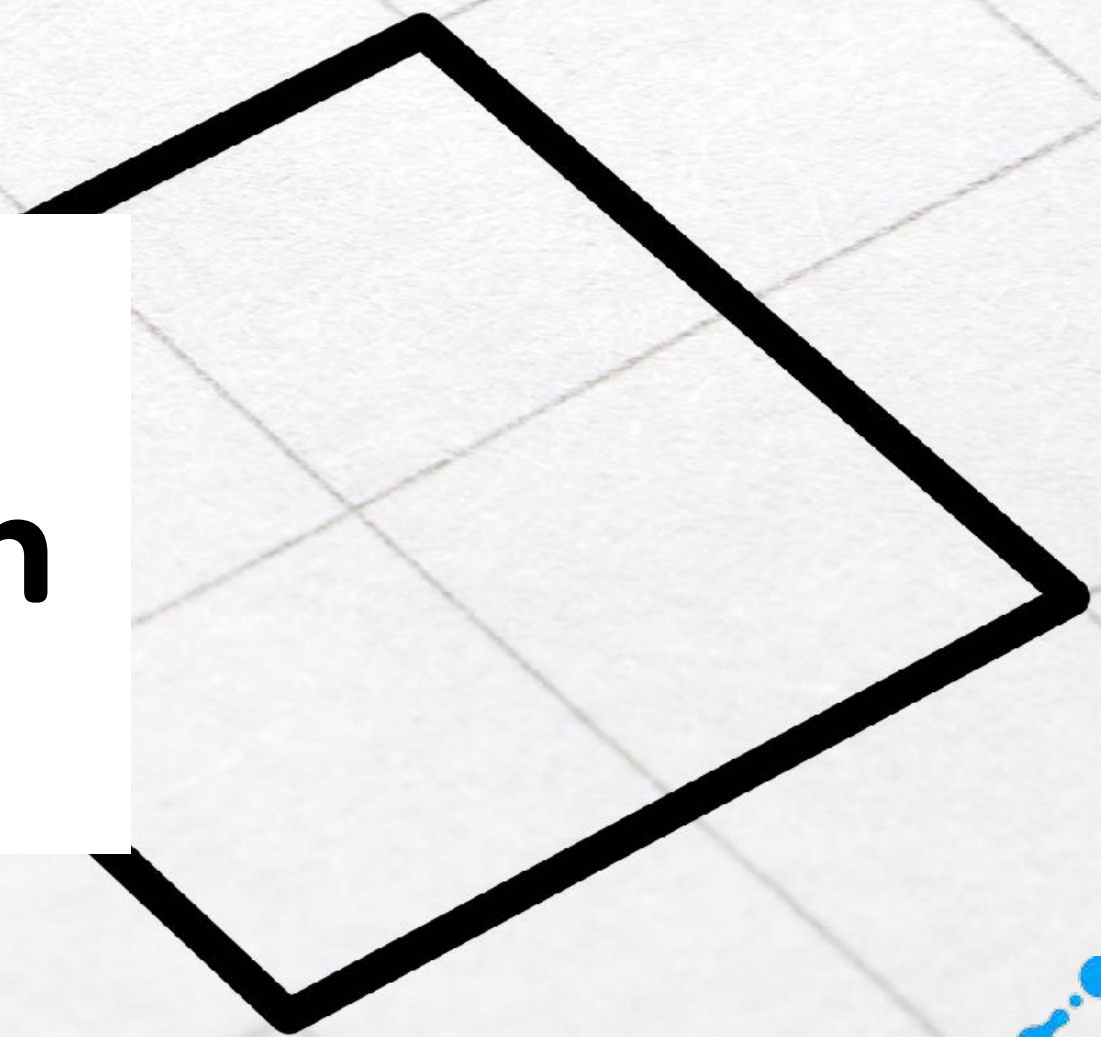
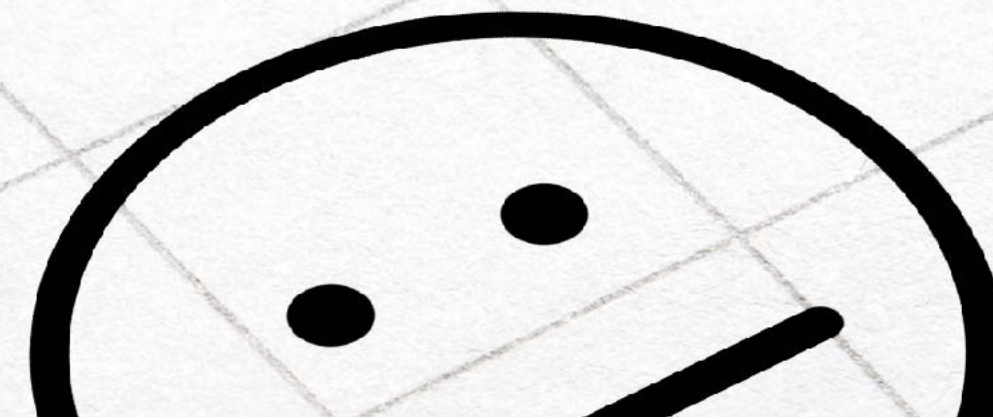
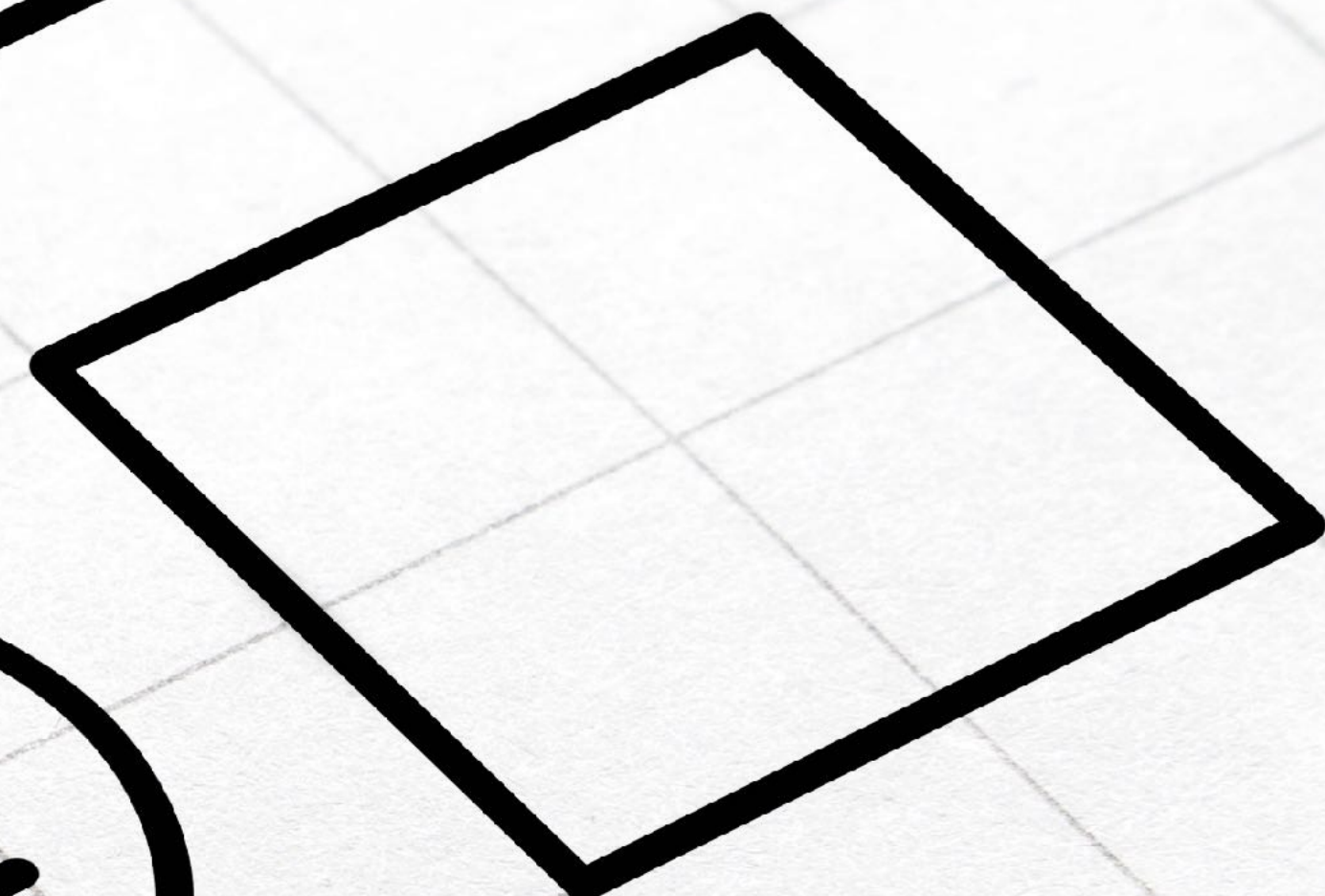
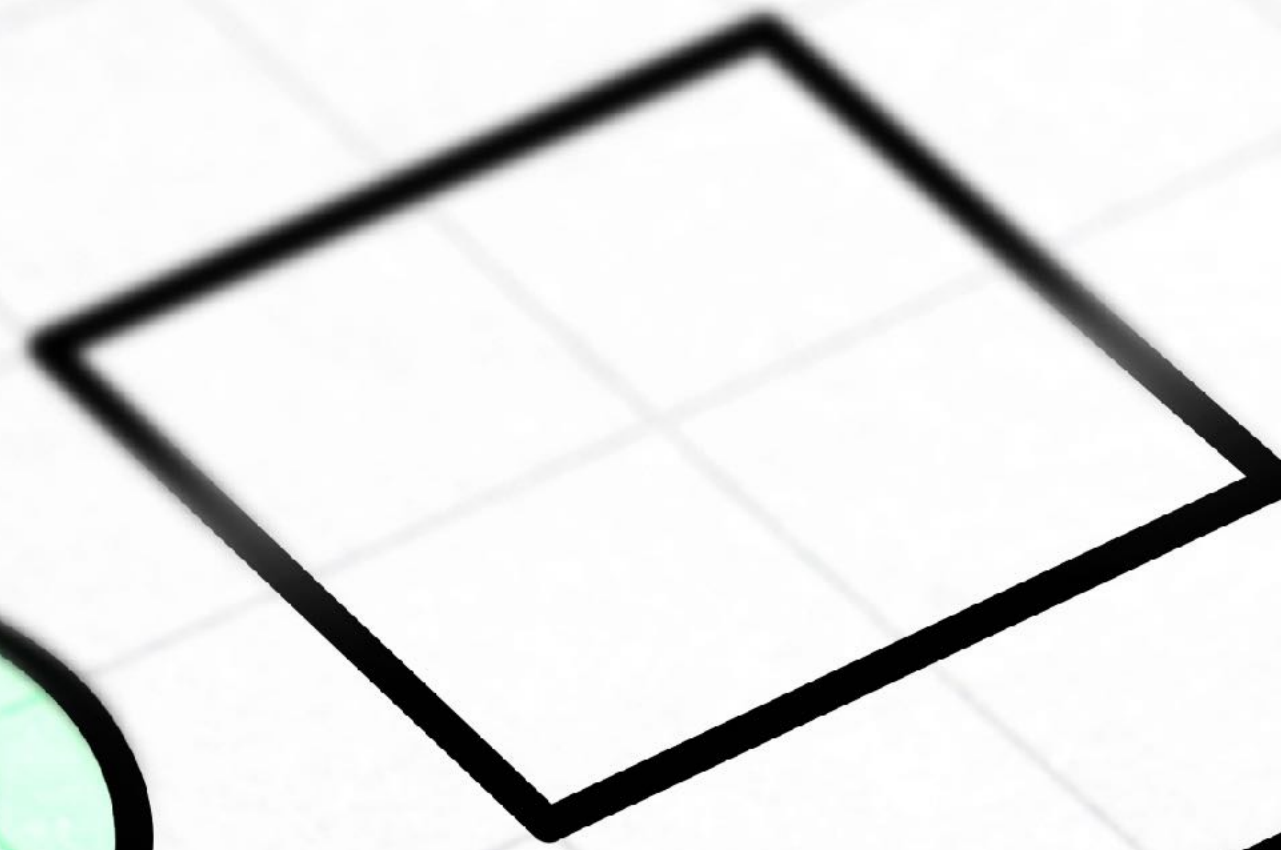
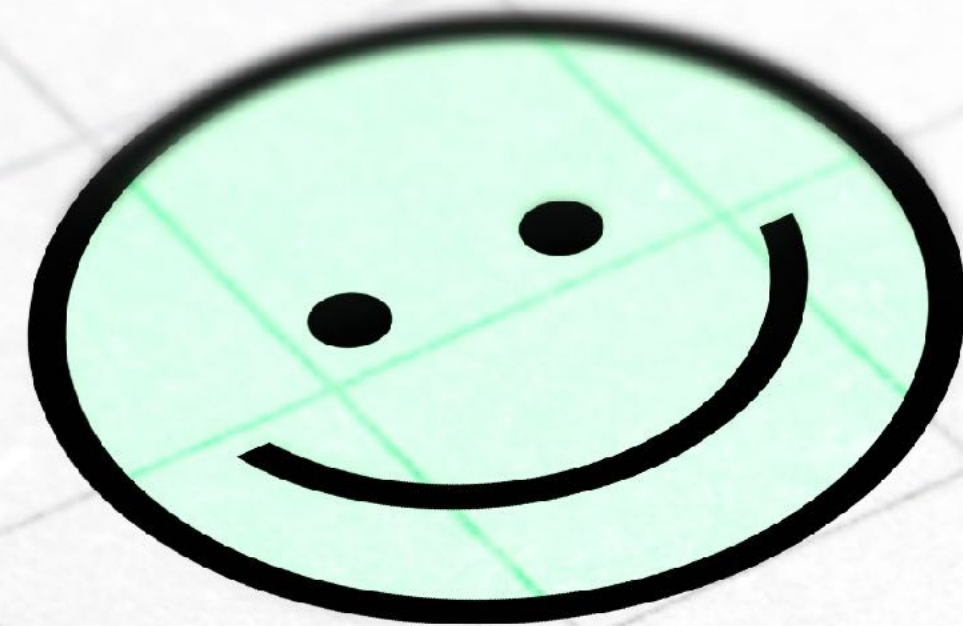
Employee experience



Digital employee experience (#DEX)
is the sum total of the **digital interactions** between a staff member and their organisation.

www.steptwo.com.au/papers/what-is-digital-employee-experience





Describe your existing digital employee experience with the person next to you

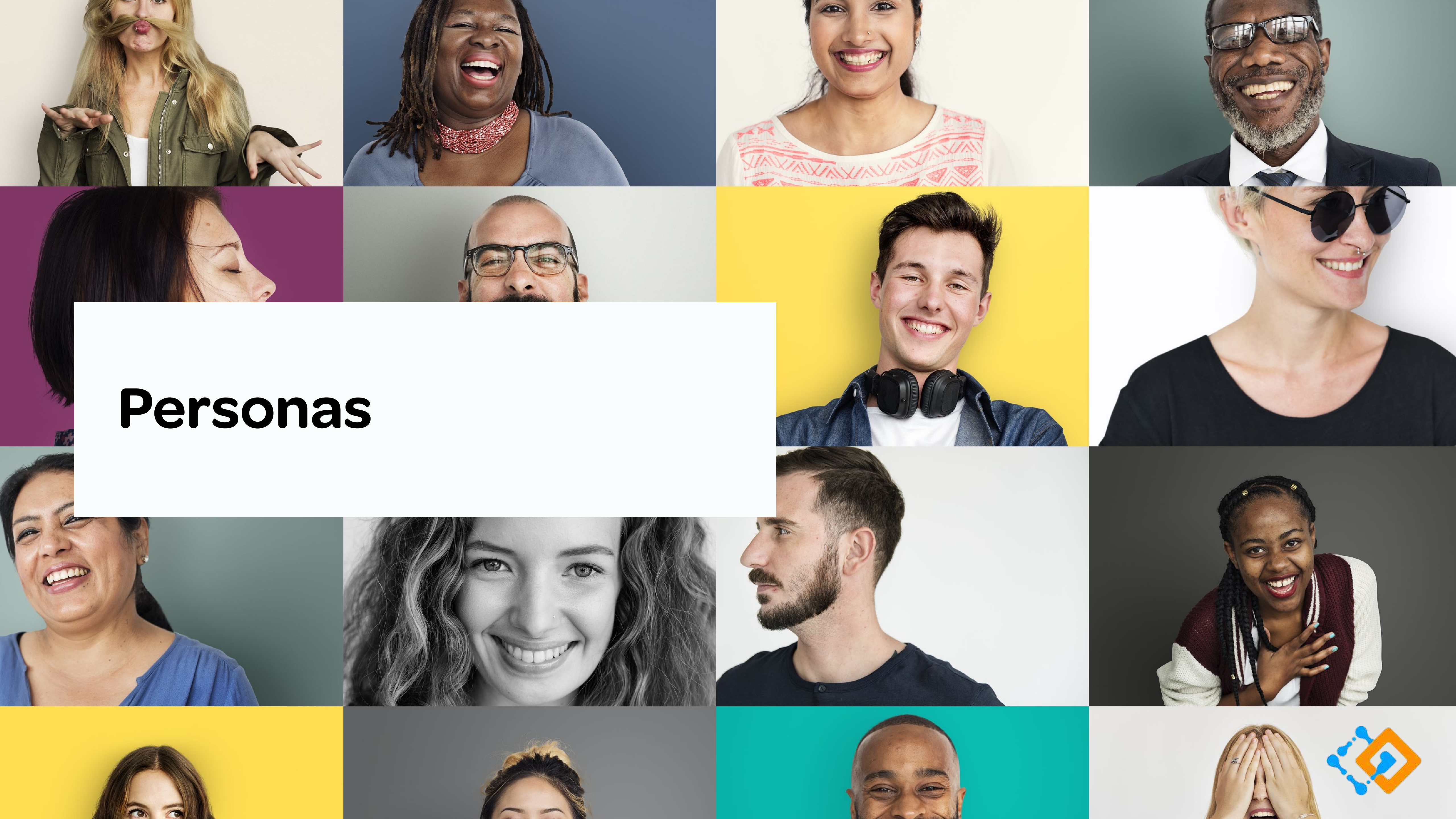


**SERVICE BLUEPRINT JOURNEY MAPPING COMPETITIVE
AUDIT VALUE PROPOSITION PERSONAS STAKEHOLDER
INTERVIEWS KPIS BRAINSTORMING MOOD-BOARDS
STORYBOARDS USER-FLOWS TASK ANALYSIS
TAXONOMIES CONTENT AUDITS HEURISTIC ANALYSIS
SITEMAP FEATURES ROADMAP USER INTERVIEWS
FOCUS GROUPS USER CASES AND SCENARIOS
METRICS ANALYSIS QUANTITATIVE SURVEYS
USABILITY TESTING CARD SORTING A/B TESTING EYE-
TRACKING ACCESSIBILITY ANALYSIS SKETCHES
WIREFRAMES PROTOTYPES PATTERN LIBRARIES ...**



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Personas



**Understanding your
employees** is the foundation
to great employee experience.



Elements of a persona

- fictional name and stock picture
- quote
- job role
- demographics
- working environment
- goals or motivations
- pressures
- what's important to them



Environment officer

Owen

About me 'I'm 35 and have a girlfriend of two years. I have a degree in Environmental Science and I've been with the Environment Agency for just over five years.'

About my job 'I am responsible for enforcing and regulating environmental policy, and dealing with pollution incidents. I have a lot of contact with members of the public and local authorities, and I work with partner organisations on joint projects. Although I have a desk, I am quite often out and about. I am very conscious that I need to be completely up to date on policy and how to apply it – I worry about getting it "right".

'I get the information I need from Easinet, people in my office and people doing jobs like mine around the regions.'

Work pressures 'Like most people, I feel that there is never enough time or resources to enable me to do my job properly. I've often got lots of tasks to complete and everything needs to be done yesterday. So to be honest, I haven't got time to wade through reams of documents to get to the important stuff.'

What I want from Easinet 'I mostly use Easinet for policy, guidance and procedures. But it's crammed with a huge amount of other information. Sometimes you just can't see the wood for the trees. And it doesn't help that some of the documents seem to be duplicated or out of date!

'All these new procedures and actions come from Head Office and the regions and yet we're the ones that have to make them happen. It's so long-winded! We really need to be able to feed back to make sure it reflects the way we do things in the field. There must be other officers in other areas having the same problems as me. I'm sure we could do a better job if we could share our experiences to find the best way of doing things. I'd feel more confident knowing that I'm dealing with issues in the same way as my colleagues.

'Of course, I really need to make sure that I have the most up to date information too, so it would help if they could highlight changes and updates.

'Aside from all the procedures and legislation, Easinet could also provide a quick and easy way into all the other data and applications that I need on a daily basis.'



Environment Agency (UK)



Environment officer Owen

'I need policy guidance and information to make sure I'm doing my job in the right way. I want to share best practice with other people like me to make sure we're all doing a consistent job.'

What I want from Easinet:

- 'I need information about legislation, policy, and guidance specific to my function.'
- 'I want to access good practice information.'
- 'I need access to data specifically related to my function.'
- 'I want to check licence and compliance information.'
- 'I need to be able to access certain applications relevant to my function.'
- 'I want to be able to give feedback on procedures and guidance.'

Environment Agency (UK)



More about Owen

This typical customer covers:

All staff responsible for our core business such as policy, regulation, flood risk management, enforcement and field staff across all our public-facing functions.

Information that is required, but covered by other typical customers:

'New starter' covers the wide range of goals that are generic across our staff.

More about the goals:

Legislation, policy and guidance

- Up to date, function-specific legislation. Summary and detail of legislation.
- Our policy
- Procedures, Environment Agency management systems, forms and guidance.

Good practice information

- Ability to share problems and ideas with colleagues.
- Good practice on how to deal with specific issues.
- What other information resources are other people using.

Data

- GIS data and interactive maps, like water quality, chemical data, river data, flooding.
- Statistics and other information at area, regional and national level.

Applications

- Access to function-specific applications (for example, Permit Administration System; National Flood and Coastal Defence Database).
- Other applications like 1B1S.

Additional information:

Both office-based and non office-based staff of this type tend to use Easinet on a daily basis. They use it to find specific information rather than for browsing. They believe that the information is there, it is just not very easy to locate – due to meaningless and inconsistent labelling. Some of it is also duplicated. The search facility does not return relevant results. The navigation is complicated.

At the moment they tend to find documents via links in e-mails and by bookmarking frequently used pages. Information is presented inconsistently across regions. The documents tend to be very long, so staff print them out rather than read them on screen.

My goals:

- 'I need information about legislation, policy, and guidance specific to my function.'
- 'I want to access good practice information.'
- 'I need access to data specifically related to my function.'
- 'I want to check licence and compliance information.'
- 'I need to be able to access certain applications relevant to my function.'
- 'I want to be able to give feedback on procedures and guidance.'

My carewords:

- Legislation/policy/guidance/procedures
- Good practice/guidance
- Data/figures
- Licensing register/compliance information/enforcements
- Applications/systems
- Feedback





Nicole

New Starter

“I want to get up to speed quickly and be able to find information at my fingertips so I don't have to ask silly questions.”

+ 39 years old

+ office based

+ access the intranet constantly from my PC trying to get up to speed

+ worked with QUU for 2 months

+ mostly uses Facebook and LinkedIn

About my job

My role will involve working with people across the organisation. I hardly know anyone, so my challenge is finding out who's who and how best to contact them. I am meeting lots of new people so the challenge is remembering all of their names.

I need to understand my role but also what is expected of me as an employee. I have so many questions. How will my performance be measured? What does it mean to work at QUU? What are the benefits? What is the culture like?

I also need to learn more about QUU, the different departments, locations and what all the different areas do. I love to learn so knowing what training is available for my role is very important.

Work pressures

Being new at QUU, I am still trying to find my way. Whilst getting in and learning my 'day job' I am also trying to get up to speed on the organisation, how we work and who does what. The jargon and acronyms are confusing but the acronym finder on the intranet helps.

Everyone seems pretty friendly and happy to help but it is hard to know who does what in the various areas.

I work with

- Team Leader - to help me get up to speed and answer any HR related questions I have
- Plumbers and developers - receiving permit applications
- Various QUU teams - for permit application enquiries or if designs are different to those on the system

What I want from the intranet

- access to induction material
- to find out who does what by role and task
- location information
- overview of the business and the different teams
- key working arrangements, leave, allowances and other policies
- access to ESS for logging my hours worked
- iService to request technical support
- first aid and fire wardens in my location
- how to order uniforms
- what are the benefits of working at QUU
- a complete list of systems and what they are used for
- what induction and training do I need to do and when

Safety for me is about taking breaks and making sure my workplace is ergonomically friendly.

My preferred communication method is face to face or email if a customer is involved.

In the last company I worked, we could read the news and access key forms via mobile, that would be great here.





Executive / manager

- Executive
- Head of division
- General manager

About

An executive or manager typically moves from meeting to meeting to engage with internal and external stakeholders. They are mobile and work from multiple locations so they seek simple and portable technology. They spend their time reviewing content and making critical business decisions, typically drawn from information prepared by others.

My work traits

- Internal and external facing
- Confidential
- Collaborative

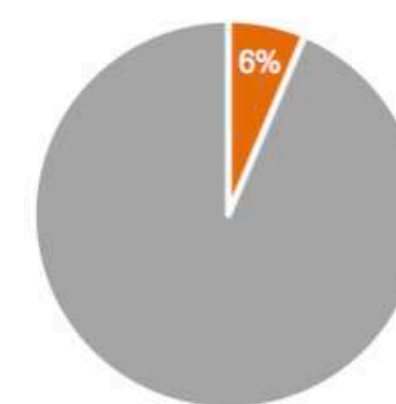
My technology needs

- Portable
- Basic features with simple interface
- Battery sufficient

Environments I'm likely to work from



Percentage of employees



The type of work I do

Working independently	Meeting	Collaboration	Doing tasks
Deep analysis	Designing ✓✓✓	Crowd sourcing ✓✓✓	Contingent ✓✓✓
Content creation ✓	Deciding ✓✓✓	Co-creating ✓✓✓	Transactional ✓✓
Reading/reviewing ✓✓✓	Communicating ✓✓	Peer-to-peer ✓✓✓	Simple ✓



Characteristics of powerful personas

- provides a common focus point
- identifies a manageable set of employees
- emphasises what staff will use
- aids prioritisation
- helps to resolve decisions
- allows solutions to be evaluated against them

When to use

- Lack of employee insight
- Gaps in knowledge and experience of the project team
- Dissemination of research into a useable format

More info: www.steptwo.com.au/papers/kmc_personas



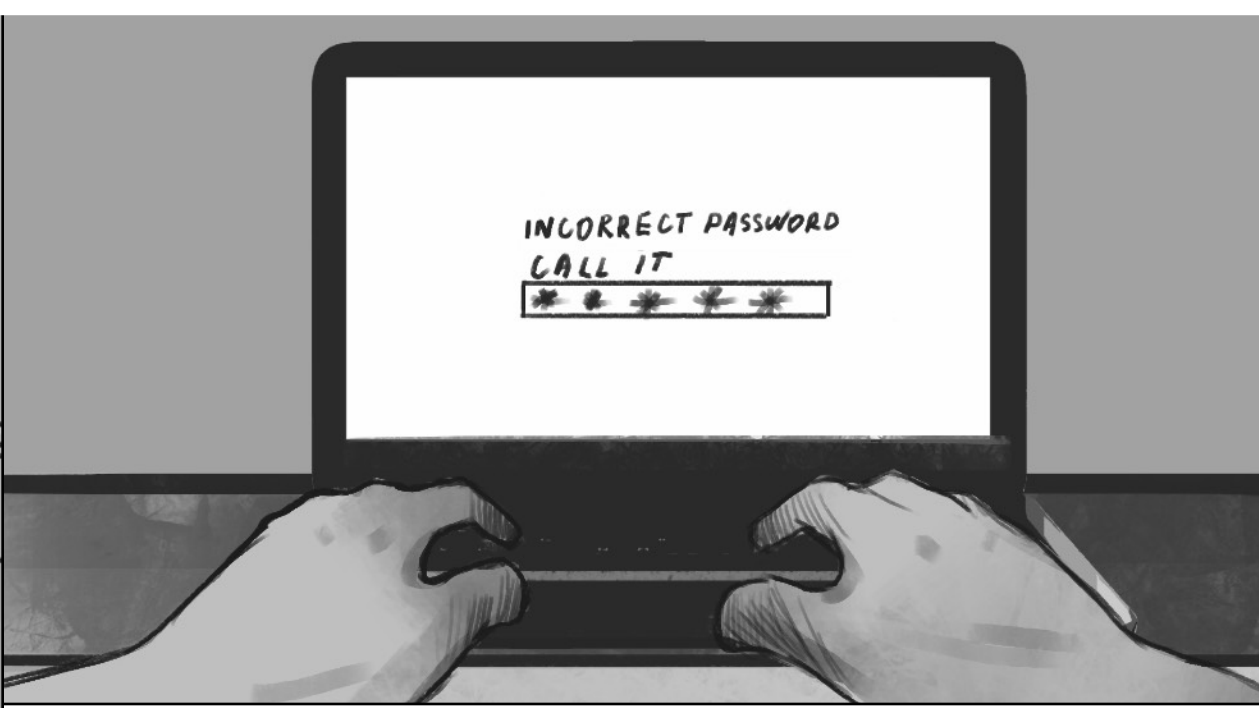
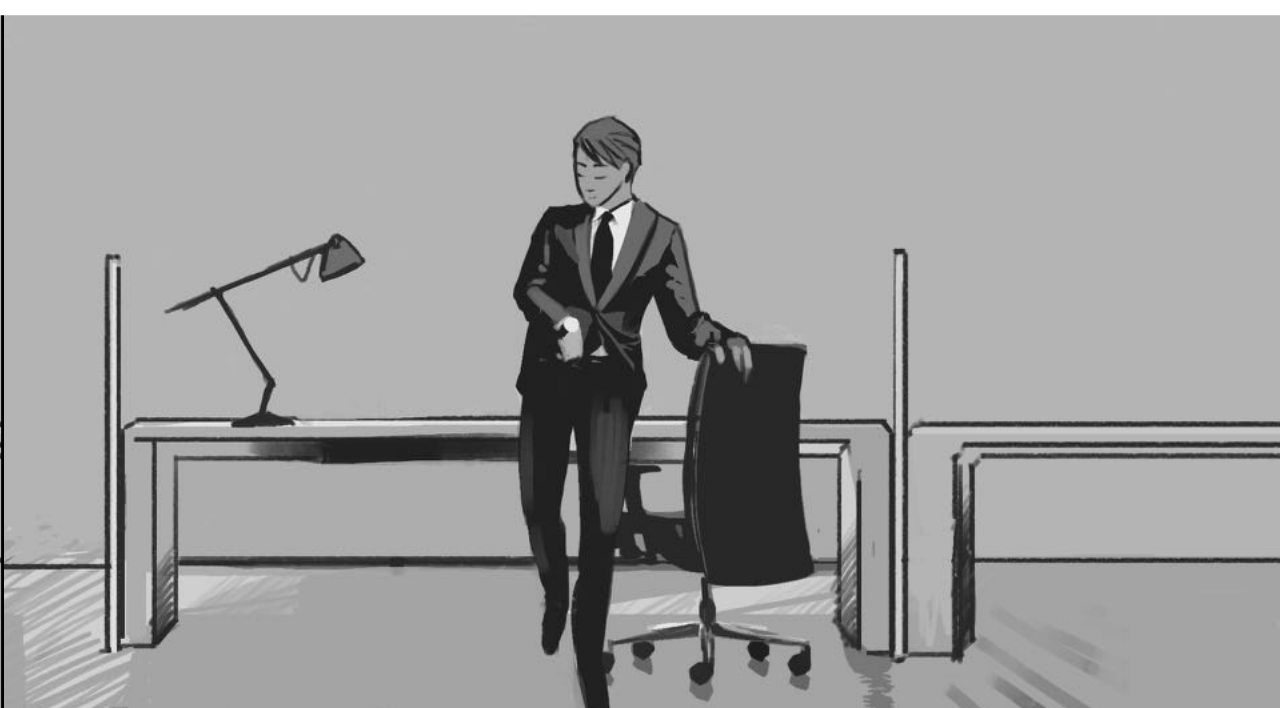
Storyboards



Elements of a storyboard

- illustrations
- sequential order
- captions for additional context
- tell a story







Create your own at [Storyboard That](https://www.storyboardthat.com)



Characteristics of successful storyboards

- makes it memorable
- draws the audience in
- helps to build empathy
- provides clues on what to fix
- prompts us to think about the journey

When to use

- To visualise and communicate the current state (at a high level)



Journey mapping



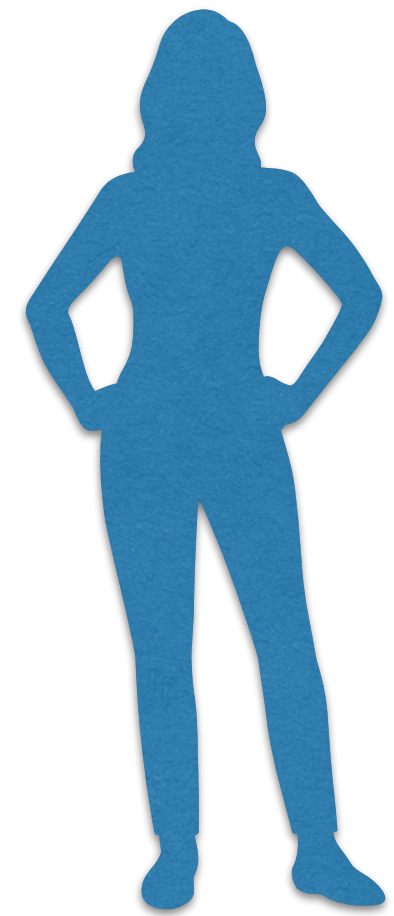
Elements of a journey map

- persona it represents
- scenario being mapped
- a timeline
- touch-points
- emotions
- problems encountered
- opportunities or ideas



Key phases of journey mapping

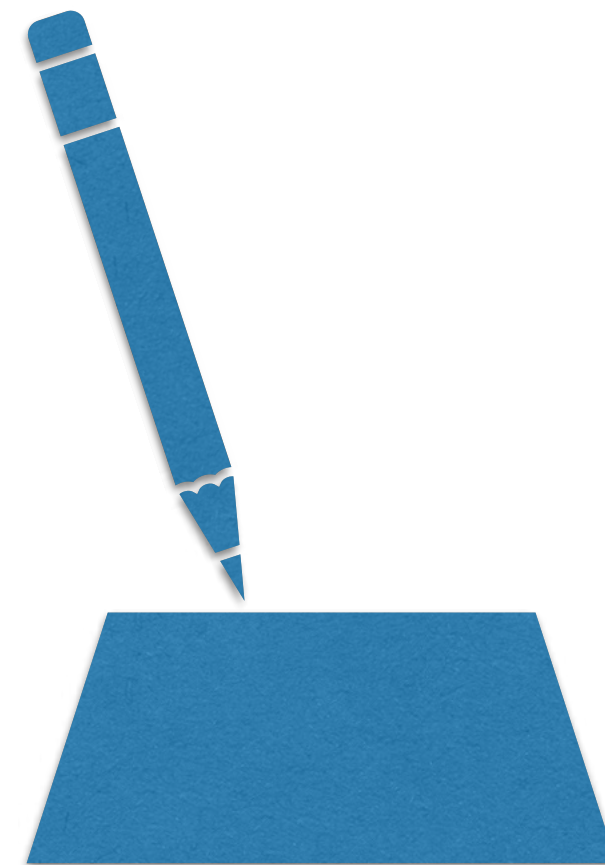
Who?



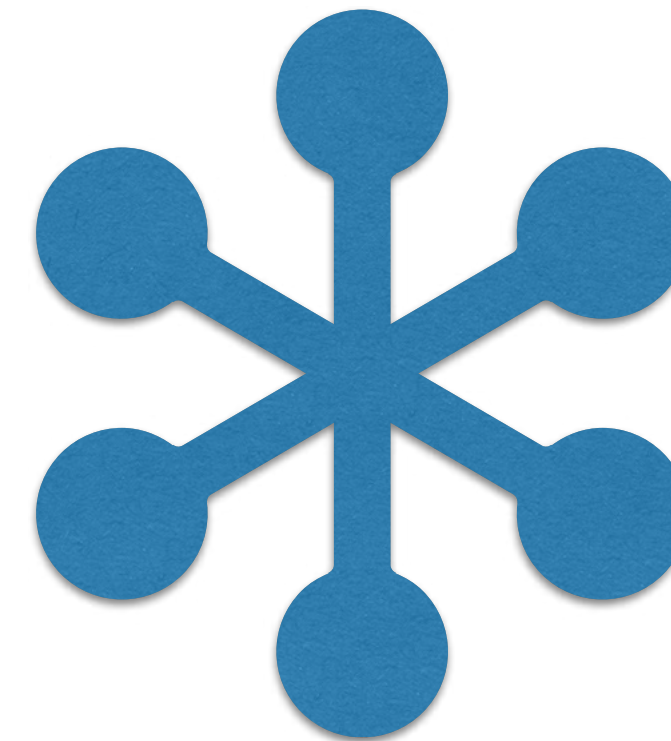
Research



Map



Visualise



Share





Rachel Alvarez, Production Manager

Manages team of 12

Works 50 hours/week

3 years at Enterprise

Houston, Texas

REAL This journey map is based on research of real employees. All events described on this page are based on true stories.



Arrives at office. Meets with staff and managers

Rachel meets with staff to plan the day ahead.

8:00am



"What a great team! I love this office."

Can't start production run because materials haven't arrived

Task Planner says to initiate production run at 1:00pm, but build materials haven't arrived.

9:00am

"This is confusing. I wonder how long we've had this shortage? Why is today the first I'm hearing of it?"

Unified View
To promote unity, make the same information available to both management and front line staff.

Extends job offer to Mark

After a second interview yesterday, Rachel calls Mark to offer him the job. Mark accepts. Rachel texts the VP Manufacturing to let her know — this is the 10th hire this week in her region. She starts the new hire paperwork.

10:00am

"I love hiring! This guy is going to work out great."

Hiring Area
Create an easy online area to walk managers through the hiring process.

Logs on to Intranet to start new hire paperwork

Rachel logs onto the Intranet again. She enters her password again.

11:00am

"These password requirements are crazy. Letter, number, capital... good thing I wrote it on a sticky note."

Simpler Passwords
Beware of a false sense of security from overly-complex passwords, which get written down.

Completes materials order; faxes it in

Rachel gets input on material order from the last of her employees. She completes the paper form and faxes it to Office Solutions.

12:00pm

"I love finishing the material order!"

"Why isn't this form online? I can't believe I'm sending faxes in 2016."

eForms
Use electronic forms that are completed and submitted in a web browser. It saves time for both the sender and recipient of the form.

Janet Danforth quits

Janet is leading a key project, but she calls Rachel and tells him she's taken another job. She'll be leaving in 2 weeks.

1:00pm

"I hate it when someone quits! What did I do wrong? Did I not create the right work environment for Janet?"

Office Tablet
Make systems available on an office tablet so managers don't have to go to their office.

Works in office on scheduling

Rachel spends an hour in the office adjusting the production schedule for the upcoming week. She also starts the paperwork for Janet's exit.

2:00pm

"I wish I could do this on a tablet out front where my staff can see me. I want to set a good example."

Stay Logged In
Except for public computers, keep users logged on for 2+ weeks.

Logs onto Task Planner

Rachel logs onto Task Planner to see if there are any new tasks or notices.

3:00pm

"My computer is secure, so why do I have to log in to the Intranet again? I was just here! Where's my sticky note..."

"There is so much stuff in Task Planner. Wish I could search it..."

Simpler Task Planner
Remove news and other non-task information from Task Planner.

Trains staff member

Rachel helps a new hire through the training workbook.

4:00pm

"These training workbooks are great. I'm glad we've gone back to paper instead of training online."

Alert System
Establish an alert system that can't be missed.

Leaves for the day

It's been 9 hours since Rachel got to work. She briefs the assistant manager before heading home.

5:00pm

"Some good things happened, some bad things happened. All-in-all an okay day."

Home Access
Provide full system access at home.

Production Manager calls: urgent materials recall

Rachel's PM calls with an urgent message: they've just learned of a plastics defect and the production line must be halted.

6:00pm

"Why did the PM have to call me? If there was a better system I could've learned about this hours ago."

Alert System
Establish an alert system that can't be missed.

Drives to plant to investigate

Rachel can't access the production system from home. She decides to return to the plant herself to ensure the plastics issue is being dealt with effectively.

7:00pm

"If I could log on from home I could find out what's going on without driving back to the office."

"Man, what a day."

Home Access
Provide full system access at home.



Rail Europe Experience Map

Guiding Principles

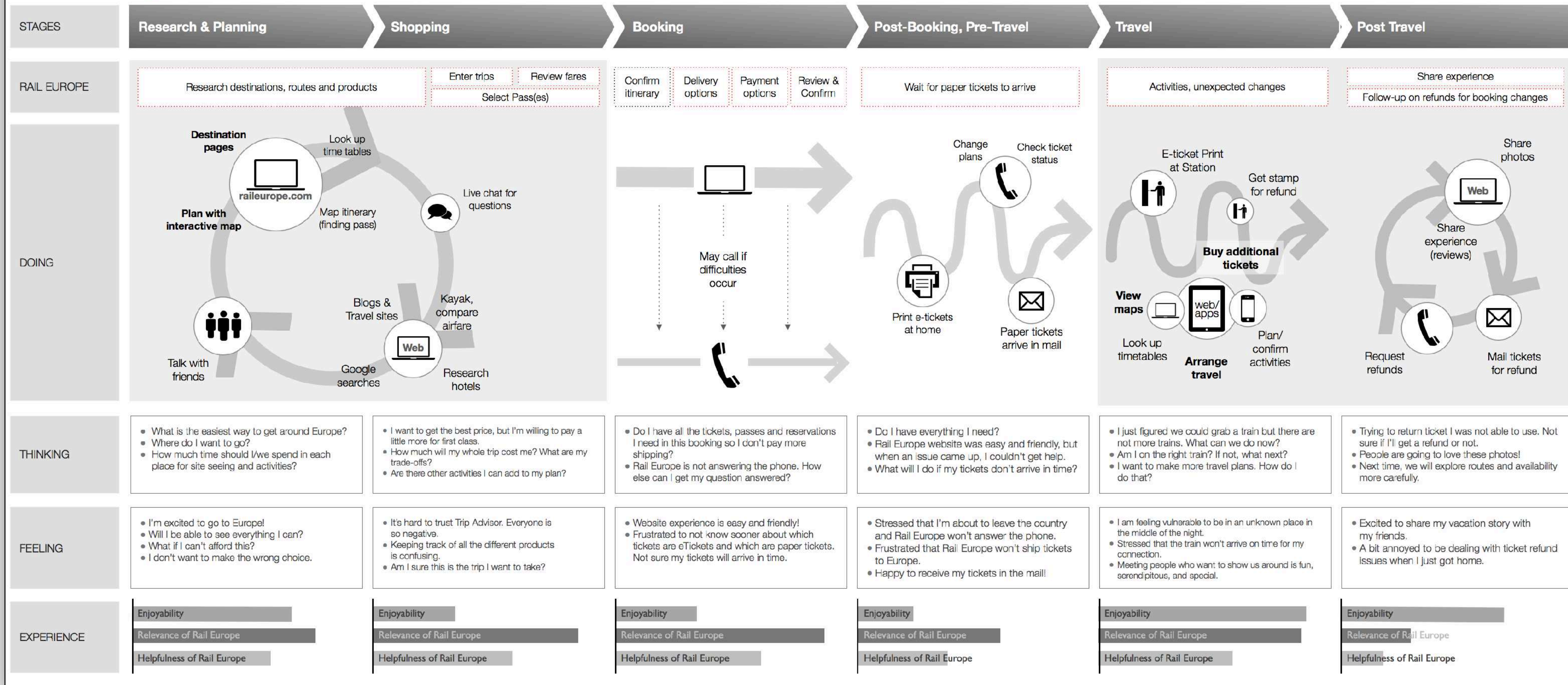
People choose rail travel because it is convenient, easy, and flexible.

Rail booking is only one part of people's larger travel process.

People build their travel plans over time.

People value service that is respectful, effective and personable.

Customer Journey





intranet leadership forum

www.steptwo.com.au/ilf

Expectations

- Employer will supply all info
- Everything will be ready for me when I start
- He other staff know I'm coming
- nothing's changed or they would have let me know
- Confirmation email or text of how to get into office

Contract

- Contract details are correct
- probity checks passed

Flexibility

- flexible working will be considered

Opportunities

- provide reliable child care to reduce unplanned leave
- digital contract triggers HR & PIT processes
- team members would benefit from flexible work hours
- handover happens on day 1
- training set out ahead of start date - online and paid
- virtual greet + meet before first day

Induction

- meet with someone waiting at door/reception
- team will be helpful +
- All logins will be organised
- handover coffee + toilet

Tour of the office

- Security pass & building Access

Security

- Security pass & building Access

ACCEPTS ROLE

- Nellie returns the letter signed to HR
- Advise HR
- HR checks formal letter of offer + issues TP

Nellie

- Approve employee setup + access to network etc
- Recruitment start time pass with password
- Checks in with Nellie at end of day - OK to go home
- Nellie to the team - provide moving fee
- HR induction session - eg. values, OHS, ethics

HR TREATMENT

- Employee profile created - e.TFN

HR SYSTEMS

- IT profile created - phone/SIM, laptop, software, network, email group
- Meet the team + find out what services they provide / Policy + Proc / Inhouse network drive
- Find out what services they provide / Policy + Proc / Inhouse network drive

IT

- IT profile created - phone/SIM, laptop, software, network, email group

Team

- Meet the team + find out what services they provide / Policy + Proc / Inhouse network drive

Facilities

- Desk, security card, business cards, stationary, car pass
- Have pass ready

Social Comm

- Have pass ready

WELCOMING PERSON

- Meet Nellie in the foyer - pass, photo, network, desk - introduction

Feelings

- Excited
- looking forward to new job
- on a high
- still excited
- what's the paperwork?!
- feel welcomed

Expectations

- why paperwork? should be online
- facilities all to be setup in advance
- Environment - decor & furnished - OHS issues (standing desk?) - hardware
- free food (why isn't this like google?)
- tech? not up to scratch
- restrictive social policy
- no chrome access
- feel cared about - so many checkins
- completed some tasks feel accomplished
- look forward to weekend!

Opportunities

- streamline & automation of processes
- setup LinkedIn profile in advance
- day in a life video (manage expectations)
- In house massage therapy - pilates/mindfulness courses
- office fruit box?
- team tools prior to start
- lower firewall access
- review HR policy & build trust
- Team building & motivation activities/initiatives
- opp meet new starters -> network
- Cross meet -> senior level (meet/greet)



Characteristics of great journey maps

- Based on real research, not assumptions
- sets out overall process
- follows the experience
- identifies problems and gaps in the process
- prompts ideation around those problems
- visualises research

When to use

- to understand the detail
- convoluted processes
- multiple touch-points and teams involved in the journey



A woman with long dark hair is wearing a white and black VR headset. She is sitting in a light-colored office chair and gesturing with her hands as if interacting with a virtual environment. Her right hand is raised and open, while her left hand is positioned lower and also open. The background is a bright, out-of-focus office space with a laptop visible in the lower-left corner.

User scenarios and user stories



Elements of user scenarios vs stories

A day in the life

- in narrative form
- introduces the persona
- depicts activities and tasks
- includes touch-points with people and technology
- communicates a typical time period

Stories

- succinct
- identifies the user
- what they want to achieve
- why they need to do it
- criteria to evaluate against



The digital workplace at

A day in the life

Sam has worked for the airport for seven years, is passionate about the organisation and gets a real buzz from the working environment. Sam spends most of his day in the terminal helping ensure that progress is maintained and issues are addressed. Sam is also one of many 'eyes and ears' for staff that are not as closely connected to operations in the terminals

Sam prepares for work: "Every day is different, you have no idea what to expect"

When Sam is on day-shift, his day begins at 4.15am so he can be at the terminal for his 5.30 shift start. One of the first things that Sam does is glance at the **airport-status overview** on his phone, just to get a sense of what might be ahead in the day - all indicators are green so nothing to be concerned about. Sam has set up his **notification dashboard** to flag any critical issues that are relevant to him.

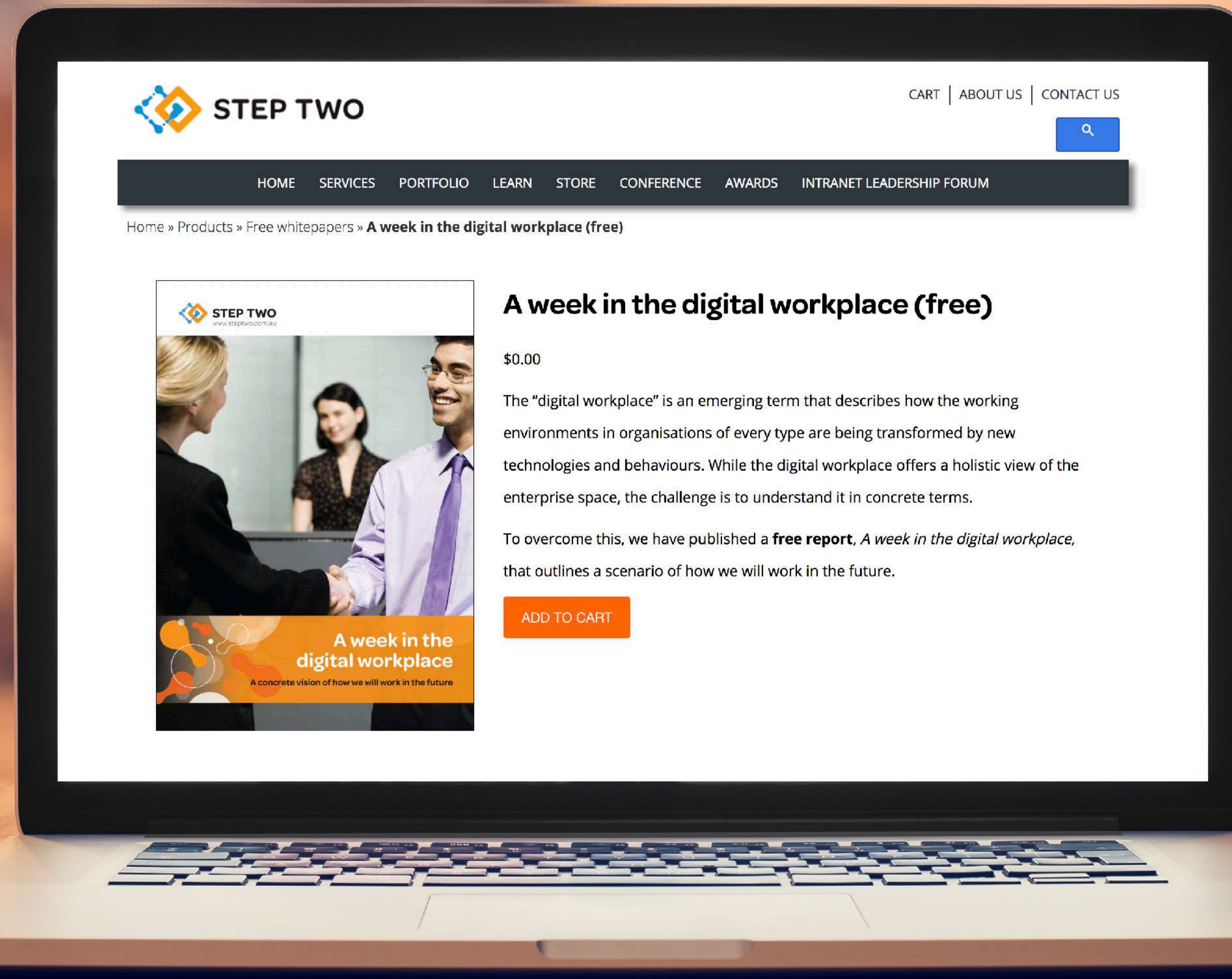
The airport is a very dynamic environment, and since he was not in the last two days, a lot has changed. So as Sam travels by train, about a 25 minute journey, he uses his phone to look at his **airport notification page**. This page collates all of the messages, reports, bulletins and flags that are relevant to him. He sorts and browses in any number of ways, but by default it presents him with new notifications relevant to him since he last logged on.

He sees a 'perimeter fence' issue very similar to one that happened several weeks ago and quickly locates all perimeter fence related messages from the last month. The four he finds suggests there may be a connection between them. The **annotated photos** and insightful summaries are particularly helpful. He adds a task to his list to follow up later in the day. He also sends an instant message to let his supervisor know his concerns.

By the time sam has arrived at T1, he is up to date with notifications, knows who he is working with on shift, and is familiar with **todays task list**. At the terminal he switches to his tablet, and is ready to proceed with his first task of the day: an inspection of the new Tiffany store fit-out. Sam brings up the **'All about' page**, selects retail, then Tiffany and this links Sam to summary client information, but what he really wants is a **project summary** which is also available from this page.



<https://www.steptwo.com.au/products/week-digital-workplace/>



What are the user experiences we want to enable?

- As a **Shire employee** who travels, I want to find out which hotels are compliant with the destination I'm going to in my destination.
- As a **travel booker** whose boss wants to go to Lexington, I want to find a hotel that is compliant.
- As a **new employee**, I want to book travel - What do I do? What am I allowed to do?
- As an **employee**, I want to get my travel approved.

<https://www.steptwo.com.au/award-winner/shire-creating-governance-first-intranet/>

Shire (USA)





WELCOME TO TRAVEL PORTAL

TRAVEL NEWS



News Article 1



News Article 2



News Article 3



News Article 4

[VIEW ALL](#)

TRAVEL CATEGORIES



Image 1

[Air](#)



Image 2

[Hotel](#)



Image 3

[Car](#)



Image 4

[Ground
Transportation](#)



[TRAVEL REQUEST FORM](#)

RESOURCES

+ [Help and "How to"](#)

- [FAQs](#)
- [Tips for New Travelers](#)
- [Travel Request User Guide](#)

+ [Reference Information](#)

- [Travel Management Agencies](#)

+ [Systems](#)



[TRAVEL POLICIES](#)



[TRAVEL SECURITY](#)

ABOUT

[Contacts](#)
[Org Chart](#)

CONTENT MANAGER


[Name of Content Manager](#)

Shire (USA)



HOME ABOUT FUNCTIONS LIFE & CAREER TOOLS & RESOURCES

GLOBAL TRAVEL HOME AIR HOTEL CAR GROUND TRAVEL MANAGEMENT AGENCIES

 WELCOME TO THE GLOBAL TRAVEL PORTAL

TRAVEL NEWS

Upcoming changes to global travel management company

615 0 0 Share

Travel guidance for recent U.S./U.K. electronic device ban

341 0 0 Share

New Global Corporate Credit Card Program


302 1 0 Share

Business Consulting, Contingent Labor and Travel Requisition Processes Updated


102 0 0 Share

[VIEW ALL](#)


TRAVEL CATEGORIES




Air



Hotel



Car



Ground Transportation

RESOURCES

- Help and "How to" +
- Reference Information +
- Tools and Systems +

[TRAVEL AGENCIES](#)

[TRAVEL POLICIES](#)

[TRAVEL SECURITY](#)

ABOUT

- Contacts
- Org Chart

Shire (USA)



Characteristics of useful user scenarios and stories

- needs to be jargon free
- provides the building blocks of the future journey
- puts the employee at the centre
- creates a shared understanding

When to use

- Communicate ideas
- Paint a picture of the future state
- Inform requirements



**SERVICE BLUEPRINT JOURNEY MAPPING COMPETITIVE
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TAXONOMIES CONTENT AUDITS HEURISTIC ANALYSIS
SITEMAP FEATURES ROADMAP USER INTERVIEWS
METRICS ANALYSIS USER CASES AND SCENARIOS
FOCUS GROUPS QUANTITATIVE SURVEYS USABILITY
TESTING CARD SORTING A/B TESTING EYE-TRACKING
ACCESSIBILITY ANALYSIS SKETCHES WIREFRAMES
PROTOTYPES PATTERN LIBRARIES ...**



**SERVICE BLUEPRINT JOURNEY MAPPING COMPETITIVE
AUDIT VALUE PROPOSITION PERSONAS STAKEHOLDER
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Strategic thinking should
be driven by **employee**
insights and the journey
they go through





DEX professionals see where improvements need to be made and what problems need fixing.



Research



Understand your employees



Identify common issues



Business value



Map the experience



Envisage the future state





STEP TWO

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