

Employee Journey Mapping

# The Key to Long-Term Employee Experience Success



# The Employee Experience Challenge

Organizations of today face a universal struggle to create an employee experience that supports the long-term success of their workers.

Unfortunately, that's far easier said than done. A rapidly changing technology landscape has made the digital workplace increasingly complex, the growth of remote work and the gig economy has fundamentally changed the employee profile of organizations and consumerization has led to expectations of workplace technology that are higher than ever before.

Businesses are in a tough spot when it comes to getting this right, especially HR departments that hold front line responsibility for the happiness and satisfaction of all employees and are tasked with attracting and retaining top talent. Thankfully, this isn't an insurmountable challenge.

By conducting employee journey mapping exercises organizations can gain a comprehensive understanding of what employees really need to be successful. Those insights make it possible to engage in purposeful efforts to create a employee experience that improves satisfaction, increases productivity, and drives business value.



# Getting journey mapping right

## A Step-by-step guide

There are no shortcuts to understanding the true experience employees have throughout their tenure with an organization, but it's an initiative that's well worth the effort given the benefits it will yield. The following guide will provide you with best practices for using journey mapping to improve the employee experience at your organization.



1.)

# Define personas/segments

Personas are a fictional representations of specific segments of your workforce (e.g. administrative assistants, field sales reps, managers etc.). You should create personas to identify those segments and therefore understand the needs of those specific employees. By understanding the different personas across your organization, it will be easier to address the needs, goals and behavior patterns of all employees. Conduct research in the form of surveys, interviews and shadowing to understand the different types of personas that exist within your organization. Document and share your findings. Don't be surprised if your research indicates the need for more than one set of personas. It often makes sense to have a few different sets of personas, aligning different persona groups with different moments of the employee journey, such as the recruiting process vs. the performance management and review process.

## *Sample employee personas*



**Call Center Carla**

*Customer Facing  
Call Center*



**Road Warrior Roger**

*Customer Facing  
Field Representative*



**Admin Addy**

*Office Professional  
Stationary*



**Connector Connie**

*Office Professional  
Roaming*



**Manager Max**

*Manager*



**New Nathan**

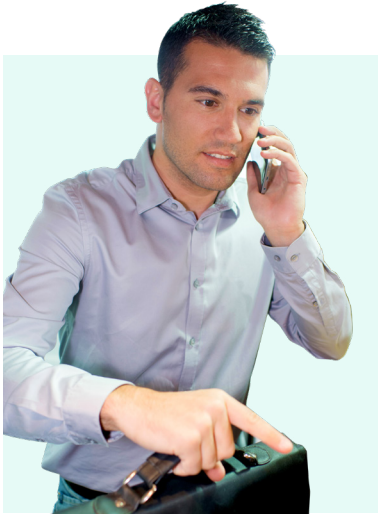
*New Employee*



2.)

# Build out comprehensive persona profiles

Using the information learned in step one, build out each individual persona into a complete dossier that includes all the nuances that make their situation unique. Be sure to include goals and pain points as well as the systems, tools, and actions that impact employees. This is where shadowing employees becomes important. Answers on a survey provide one level of detail into the employee experience. But its only through observing employees as they go about their daily tasks that the true reality of their experience will become fully apparent.



**“People call me day and night, all the time. That’s how I get referrals.”**

#### SAMPLE ROLES

- Sales Representative
- Territory Manager
- Claims Resol. Spec.
- Underwriter
- Field Counsel

#### TECH DEVICES

- Laptop
- Surface Pro Tablet
- BYOD iPhone (w/ hotspot)

## Road Warrior Roger

*Austin, TX | WFH 3x/week, rarely in office, lots of driving*

#### ABOUT ME

It’s all about sealing the deal — I’ll answer my own phone in the middle of the night if it means making a sale! I also work hard to develop and maintain relationships with agents in my region. They ask for a lot of policy reference material so I like to get that to them ASAP so they can follow up with their own customers.

#### MY EXPERIENCE/GOALS

- I want to quickly and easily locate info for my agents and send it to them
- In the systems I use it’s really important that I can tell immediately what is an FYI vs. what I have to take action on—and by when
- I need to get notifications about new leads as soon as possible
- If news is important, I expect that I’ll hear from my manager at the weekly huddle
- I need to stay organized across 3 different devices

#### PAIN POINTS

- Mobile experiences are sometimes inconsistent with the web version so I have to keep track of what’s different
- So much content on *myIntranet*; it’s hard to find info I’m looking for
- Search can be hit-or-miss
- I hate feeling like I am wasting time

#### DIGITAL WORKPLACE APPS & ME

- I rarely visit *myIntranet*; When I am there, I’m looking for info for agents
- My team has a *myNews* page with regional updates/alerts
- Too many locations to find information, I frequently forget what system to use for what

#### DELIGHT ME (OPPORTUNITIES)

- More accurate search results
- I’d like to categorize myFavorites
- Help me stay organized whether I’m in the office, at work, in my car, at home, or somewhere in between (car dealership, credit union, etc.)

#### CONNECTIONS/RELATIONSHIPS

- Agents / Customers
- Manager
- Colleagues

3.)

# Map out the user journey for the experiences you want to improve

For each experience that needs to be improved (e.g, the day-to-day work experience, onboarding, performance reviews, submitting expenses, requesting assistance from IT, etc) conduct a full user study by sitting down with the different roles that align to each persona to map out their experience and align emotional triggers. These user studies will make it possible to identify the pain points that are the biggest/easiest areas for improvement. Don't overlook the small yet impactful experiences in this process either. Small incremental frustrations add up over time and can be very damaging to the overall employee experience.

## Sample Employee User Journey

	AT THE OFFICE Setting up meetings, scheduling travel, sending emails, etc.	AT THE OFFICE Participate in team huddle.	ON THE ROAD Traveling to visit customers/agents.	PLANNED MEETINGS Meeting with customer/agents in my region.	AT HOME Reviewing my notes, entering data into systems, returning emails, calls.
😊	Relatively relaxed time, as I'm not on the road. Get to come into the office to prep for the week ahead.	Indifferent. Good to get info from manager, but I could be doing other things.	Productive time. I can return calls in between meetings. I get calls and texts while I'm driving but can't respond, so things can get a little delayed.	Satisfying, I enjoy meeting with customers.	Happy I have access to systems at home, but wish there was an easier process to record mileage and send follows up.
😞	Frustrating to have to take care of a bunch of administrative task, which I had an assistant or admin to help. A lot of planning ... figure out who you need to see. Construct your 'milk route.'	Potential for wasted time, but it's also where I can connect with my team and hear relevant news and updates.	Sometimes need to pull over to make a call or enter something on laptop. Hotspot connectivity can be iffy. Draining. Have to drive long distances for meetings.	Wish we had access to information in an easy to consume format on our devices. We'd get much more work done. Hard to get things done with laptop; other things hard with phone. Both are hard to use when meeting face-to-face with customers. Aggravating. Can't get a solid VPN connection. I can't get into system.	If one page included every link that we use here in personal sales and we only had to go to one place to find it ... Need to make sure my notes are entered into systems ... things may get a little delayed waiting until EOD. Inefficient. I have to enter info into 3 different systems.

TERRITORY MANAGERS
  SALES REPRESENTATIVES

*The sample above illustrates a hypothetical user journey for evaluating the “work day” of a front-line worker persona.*

# Find moments that matter

When thinking about “moments that matter,” it’s usually the standard rites of passage that come to mind — onboarding, anniversaries, promotions, offboarding, etc. While those are certainly important events, limiting opportunities to engage employees and foster goodwill to just a handful of significant moments is an unfortunate waste. Whether organizations realize it or not, there are many events in an employee’s day-to-day experience that should be considered moments that matter, and they can either be optimized or squandered based on how well they’re executed. Take, for example, routine tasks like looking up vacation balances and payroll details, finding information or getting an IT issue resolved. If those experiences are too complicated and cumbersome it creates a negative experience and a wasted opportunity to build loyalty with employees.

To ensure each experience is used to its fullest advantage, organizations should talk to employees and even shadow them in their roles to gain an understanding of where pain points exist and what improvements could be made that would enhance the employee experience and simplify the work day. Common areas that create friction and could generally use improvement include needless busy work and generic, one-size fits all experiences.



**Not sure where to start?**  
The following two pages provide a template you can use to survey employees and identify the moments of truth that represent quick wins for improving the employee experience.

# Your Employee Experience Baseline

As you and your organization embark on an employee experience initiative, one thing must remain constant: design everything with the end-user at the center. Without a focus on specific touch points across the employee journey, companies can fall into the siloed, “top-down” approach that created a fragmented EX in the first place.

But before you can address improvements to your EX, you need to understand where things stand today from the average employee’s perspective. Below our team has identified some of the common experiences that frustrate employees because they were designed for department or business need, rather than with the employee’s needs in mind. We’ve created a usability test to guide the process of understanding what those experiences are like from your employees’ perspective so that they can be addressed as part of the overall employee experience improvement initiative.

## How it works



### 1. SELECT YOUR INTERVIEWEES.

We recommend engaging with at least 10 random employees, each of which will perform all of the Usability Tests. Depending on the scope of your initiative, the number and types of employee role will vary. For example, if you are taking on a company wide effort to address all employee needs, ensure you have selected at least 2 of each persona — Desk-workers, remote-workers, and field-workers, if applicable.



### 2. CHOOSE RELEVANT USABILITY TESTS.

The suggested exercises below represent common tasks and workflows meant to illuminate challenges and inefficiencies as employees interact with digital workplace tools. The exercises should also be tailored to represent your unique organization, so make sure these are things that most employees in your target segment need to do at some point during their time at your company.



### 3. EXECUTE, MONITOR AND MEASURE.

Either monitor employees or have them fill out the feedback sections beneath each test allocated for tools / systems involved, time to completion, friction, unknown, and additional comments.



### 4. ANALYZE AND PLAN.

Once you have feedback or observations from each employee, aggregate the data and look for trends. The tools related to the most common “friction” and “unknown” points are probably where to focus your initiative. Some of the most common trends we’ve found from employees include “I didn’t know where to go.”, “Too many steps and took too long.”, and “The onboarding process felt unprepared and unorganized.”



# Usability Tests

Navigate to and watch the latest company-wide “Town Hall” or equivalent.

Tools/Systems Involved	Time to completion	Unknowns	Friction

1.) Go through the steps of booking a hypothetical business trip to a different regional office. Can you book a meeting room?

Tools/Systems Involved	Time to completion	Unknowns	Friction

2.) Question the employee on a specific company policy and monitor if and how they reach the answer.

*Example: What benefits does my company provide for Maternity Leave?*

Tools/Systems Involved	Time to completion	Unknowns	Friction

3.) Reach out to the appropriate facilities manager as if there was a hypothetical issue.

Tools/Systems Involved	Time to completion	Unknowns	Friction

4.) Submit an IT HelpDesk ticket. Can you do the same for the HR HelpDesk?

Tools/Systems Involved	Time to completion	Unknowns	Friction

5.) Locate the most recent corporate announcement. What was its main message?

Tools/Systems Involved	Time to completion	Unknowns	Friction

6.) Check the status of your current employer health benefits. How easy would it be to make a change if you wanted to?

Tools/Systems Involved	Time to completion	Unknowns	Friction

7.) Monitor at least two new employees’ first days or provide them with a survey. Did they have all necessary hardware? Did they know where to go? Did they know what tasks they needed to complete? Did they meet the team? What rocked? What could have been better?

8.) What is the average time to resolution for the HR HelpDesk? (Most Help Desk supervisors and managers should know this information.)

9.) What is the average time to resolution for the IT HelpDesk? (Most Help Desk supervisors and managers should know this information.)

## 4.) **Solicit (and implement) feedback**

Understanding what employees want and need is key to success, so ask them! They'll be more than happy to make suggestions for improvements so focus on those issues in order to make a quick impact. You should also plan to tie in mechanisms for feedback so you can monitor the response to any changes you make and continuously get a pulse on how the employee experience is at each stage of the journey and all touchpoints. Finally, be transparent about how you go about implementing the feedback you receive. The more employees feel that they're being heard, the more likely they are to participate in the future.

### **A few other things you might want to think about ...**

- Design experiences that help employees achieve their intent more efficiently and ask for employee assistance when coming up with solutions
- Consider a design thinking approach and implement ideation sessions as part of that process
- Implement feedback metrics that tie back to employee engagement results
- Treat each stage or element of a journey as an "on-going" process that requires the appropriate and continuous research, testing, and feedback loops



# Take your first steps towards journey mapping success

We'd love to chat and learn more about your goals and plans for improving the employee experience.

Visit us at [Workgrid.com](https://workgrid.com)

