



How to Build a ***BEST-IN-CLASS*** Digital Workplace

Case studies and advice from 8 leaders who
are building a better employee experience

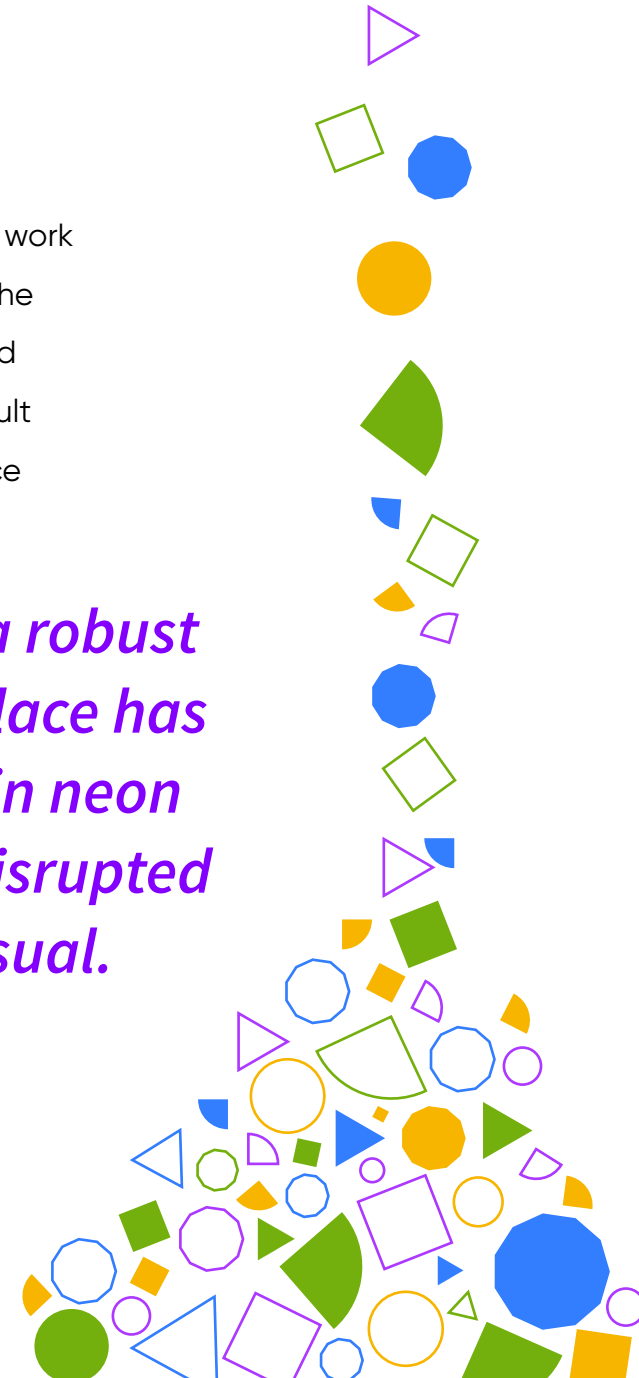


Introduction

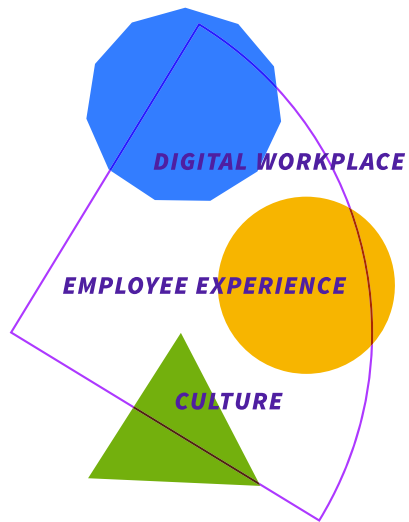
Everyone wants a great experience at work. And every leader wants to build that kind of organization. But there are a lot of factors that need to come together to create a best-in-class employee experience that enables people to collaborate, work productively without roadblocks, feel connected to each other, and understand the impact of their work. Add in the unexpected, monumental challenges of 2020, and employee experience becomes even more pressing to focus on – and more difficult to engineer. The need for a robust digital workplace has been written in neon since COVID disrupted business as usual.

And there's another complicating factor that existed well before 2020 rolled around: A lot of different parts of the organization contribute to employee experience, but we all use different languages to discuss it.

The need for a robust digital workplace has been written in neon since COVID disrupted business as usual.



the different terminology

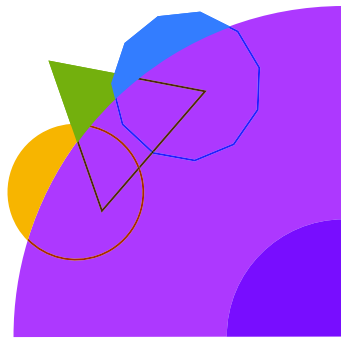


- IT might call it "**digital workplace**," with a focus on the everyday tools we use to actually get work done.
- HR calls it "**employee experience**," and uses that term to encompass everything from onboarding to employee benefits to recognition and rewards.
- Executive leaders want to know about overall employee engagement, **culture**, and how the **employee experience** impacts business results.

We need all of these elements to build a truly cohesive experience for employees. If you just buy a new tech platform, but don't roll it out well, don't integrate it with your existing systems, or don't consider how it fits into your culture, your employee experience won't change much (or it might actually get worse). To really shape and change the employee experience, you need intentional collaboration, a strategy everyone agrees on, and a focus on the employee perspective. If you think about the employee experience from the employee's perspective, you realize that the most important priority is solving employee challenges – it's about a holistic solution, not one specific tool or software.

At Sift, we're obsessed with understanding how great employee experiences come to life. We use those lessons to help teams create a foundation of collaboration and humanity to ultimately create a better digital workplace. Through our research and conversations with customers, we have learned one key truth: To build a best-in-class employee experience, you need IT, HR, and the C-suite to agree on a central strategy, work from the employee's perspective, and collaborate closely.

No one wants employees to work in a silo, and you can't build a better employee experience in a silo, either.

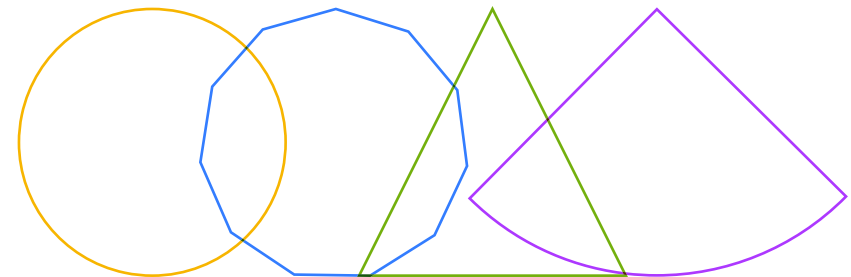


The most important priority is solving employee challenges.

To build a best-in-class employee experience, you need IT, HR, and the C-suite to agree on a central strategy, work from the employee's perspective, and collaborate closely.

this ebook will

- Break down the **current state of the digital workplace and the employee experience** and the challenges organizations are facing.
- Share a **case study from Rocket Mortgage** on how leaders at the 20,000–person company have built a best-in-class employee experience by rallying teams around a core strategy and strong culture.
- Give you **actionable advice for building a better digital workplace and a stronger employee experience** at your own organization by getting executive buy-in, setting a clear strategy, and encouraging collaboration between key players.



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The Current State of the Employee Experience

Right now, we're at a pivotal moment for the employee experience. Two important phenomena are converging to create a moment primed for innovation and transformation.

Two Major Trends Are Driving Change

First, employees are ready for an easier way to work. There's a groundswell of interest about the digital work experience. As digital natives enter the workforce, and as more experienced generations become savvy consumers of digital tools (hello, Facebook), there's a growing push for a work experience that's intuitive and easy – a digital workplace that's so natural, it's almost invisible to employees.

Second, the tech landscape is shifting dramatically. For decades, companies used big, slow, often clunky on-premise software to keep track of employees and get work done. As technology moves to more cloud-based software that's nimble, faster to implement, and designed with employees' experience in mind, the way companies buy and use these tools is completely changing.



But Transformation Comes with Challenges

Even before 2020, these two trends were driving digital transformation in all parts of organizations. That change was mostly good, but it wasn't always coordinated. Leaders in different parts of organizations bought new, better tools and pushed them out to employees. People didn't always know how to use the new tools, and it was challenging to piece them all together.

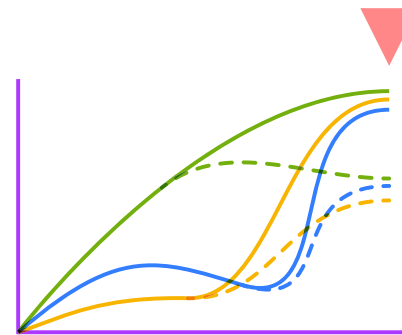
COVID Pushed Us to Change Faster

When COVID hit, everyone was pushed to move even faster. If an organization was plodding through a digital transformation, they had to hit the gas overnight.

COVID forced a lot of companies to fast-forward to modern standards. Every organization is certainly on a more advanced point on the maturity curve than they thought they'd be in 2020 – by necessity.

Now What?

And now, many months into forced remote work, we all have whiplash. We rushed to get all the necessary tools in place, but how do we make them work together in a less fragmented, more elegant way? How do we take



Every organization is certainly on a more advanced point on the maturity curve than they thought they'd be in 2020 – by necessity.

siloes individual experiences and thread them together to create an experience that's logical and easy? **If our digital workplace is the employee experience, how do we create a digital culture that reflects our values and mission?**

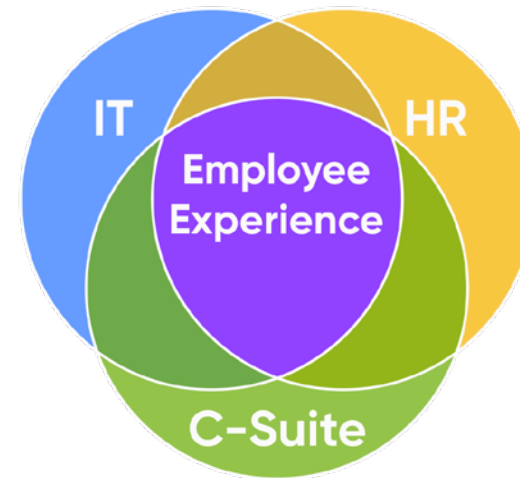
Many organizations have their core pillars in place. They have ticked the boxes on the big must-haves, mostly using powerful, large-scale technology like Microsoft Teams. Employees have the ability to send emails and IMs. They can find and store files. They can run a video call. Now, it's time to connect the dots and fill in the gaps of the employee experience. Sure, I can send an email. But how do I figure out who to send it to?

And another big question is looming: **Who's in charge here? Who owns the digital workplace?**

Who drives the employee experience? Our old answers about what HR owns, what IT owns, and what the C-suite owns are shifting. Everyone has a piece of the puzzle, and the Venn diagrams of ownership are overlapping more and more.

To create a seamless employee experience, organizations will need synchronized leadership working toward a shared goal.

Who Owns The Employee Experience?



CASE STUDY

Rocket Mortgage



Rocket Mortgage

DETROIT, MI • NYSE: RKT

EST. 1985 • FOUNDED BY DAN GILBERT

What we do

We're obsessed with finding a better way to make life radically simple.

Finding a better way is the only way. We look at every situation and wonder how we can make it better—because we can always make it better. The word “satisfied” just isn't in our vocabulary. That's why we're driven to make everything we touch radically simple: We believe that simplicity makes things better for everybody.

Why we do it

We revolutionize the entire mortgage experience.

Our team members

With over 19,000 amazing team members nationwide, we have many locations, including the following cities:

Detroit

Phoenix

Cleveland

Charlotte

What we're known for

Innovation

Client Satisfaction

Mortgages

Detroit Revitalization

Awards



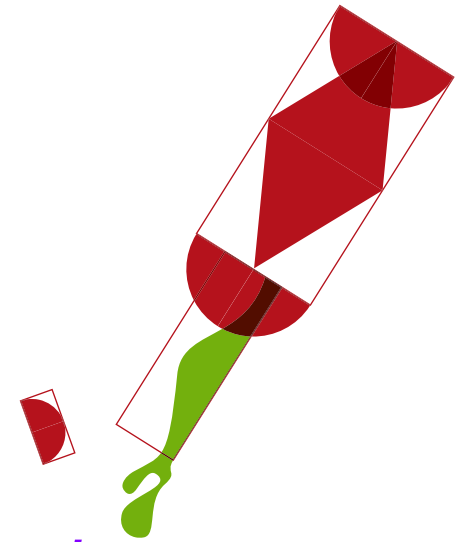
FORTUNE
100
BEST
COMPANIES
TO WORK FOR
2019

Rocket Mortgage is a recognized leader in team member experiences. They have been in the top 30 on FORTUNE magazine's Best Companies to Work For list for 15 consecutive years. Excellent customer experience and team member experience are baked into the core mission. The company's core values were even cited in its parent company's recent IPO. At Sift, we're familiar with the mission and culture. Just like Rocket Mortgage, we are a member of the Rock Family of Companies.

To better understand how that award-winning team member experience has been built over time, we interviewed 7 leaders across Rocket

Mortgage. One takeaway became clear: At Rocket Mortgage, the "secret sauce" is the culture – a clear, mission-driven culture that all 19,000 team members understand and use to guide their daily decisions about how they work with customers, treat each other, solve problems, and get things done.

Culture isn't something you can steal. It's not an easy thing to copy and paste. It's not a hack or a secret playbook. It's a human-powered, core operating system. But we learned a lot of helpful insights we can all apply: how to develop a culture, apply it to the employee experience, and collaborate to **build a digital workplace that makes work better, instead of getting in the way.**



*At Rocket Mortgage, the
“secret sauce” is the culture.*

Leadership Sets the Course

It All Starts with Culture

To build a strong employee experience, you need buy-in and guidance from the highest levels of executive leadership.

Why is culture so important at Rocket Mortgage? We asked Bob Walters, COO and President.

Bob says it's all about guiding people's decisions. "We're all confronted with thousands and thousands of decisions every day," he says. "How do we make those decisions? A lot of it comes down to culture. **When you know who you are, the decisions are easy.**"

He points to the world's most successful companies and argues that most of them started with a core belief that people would line up for and rally around. "People aren't going to line up for a three-year capital plan. But they will line up for a belief. If you want to create something amazing and magical, it starts there."



Bob Walters
President and Chief Operating Officer

JOINED JANUARY 1997

Skills

Problem Solving

Expert



Economics

Expert



Personal Finance

Expert



Capital Markets

Expert



Interests

History

Skiing

Cleveland Cavaliers

Unicycle

Michigan State University Sports

About me

Proud QL team member since 1997. I love things and processes that are brilliantly designed with the client in mind.

MSU Spartan. OU Pioneer. UM Wolverine (MBA).

"Every system is perfectly designed to get the results it gets." - Paul Batalden

Rocket Mortgage's beliefs are documented in 20 sayings, or "ISMs," that team members remember and repeat to each other constantly. The ISMs work like an operating manual for all of those daily decisions. And they're not complicated concepts, Bob says. "Most of the ISMs we learned by the time we were six years old. But that doesn't mean they're not powerful."

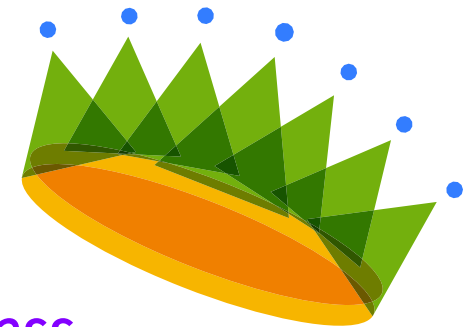
Here are a few examples of the company's ISMs:

Yes before no. The company has a culture of "YES," which is in stark contrast with the automatic "no" at many companies. The focus is on growth, possibilities, ideas, innovation, positive impact and results.

We are the "they." The company teaches its people to create solutions. Some mysterious "they" aren't going to fix things. Everyone has individual ownership over making decisions, fixing problems, and making things better.

Numbers and money follow; they do not lead. In other words, if you're always focused on how much money you can make from the next deal, or the awards and accolades you want to win, you're stuck in a limiting mindset. If you build greatness, the money and the rewards will follow.

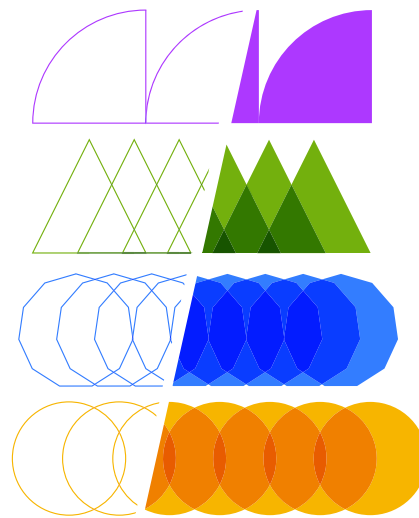
*If you build greatness,
the money and the
rewards will follow.*



The ISMs really do guide daily decisions at the company. In every conversation we had with Rocket Mortgage team members, we heard the ISMs thrown around as shorthand. The ISMs were offered as justification or explanation: “This is the way we think, so this is the decision I made.”

Use Technology to Solve Problems and Make Lives Better

Bob knows that you can’t create a better experience just by buying new technology. “Fire was a technology, the wheel is a technology, the printing press is a technology. If you just think of tech as tools, then you can think about how to best use tools. How do you lever them? How do you incorporate them? Because a tool is useless without a user and a use case to adopt it.”



“A lot of people think, ‘What’s my technology budget? What can I go buy?’ But the real question is, ‘What are you trying to solve?’”

“A lot of people think, ‘What’s my technology budget? What can I go buy?’” he says.

“But the real question is, ‘What are you trying to solve?’ How are you going to change people’s lives for the better?”

A Shared Mission Makes a Company More Resilient

How did Rocket Mortgage stay resilient when all of its team members suddenly started working from home? Bob says the secret was in the company's shared mission. "It's the difference between two prepositions: *with* and *to*. Are we doing this *with* people or *to* people?"

"History is replete with remarkable instances of human achievement and sacrifice when people are *with* each other. But if you feel that something's being done to you – if you feel like the big boss somewhere is telling you to do something, you don't feel valued or heard, and you don't contribute in the same way." Rocket Mortgage operates *with* its people, who all share a mission.



One tool that makes life better every day at Rocket Mortgage is Sift.

“

I use Sift all the time. I've used it five times already this morning. I want to know: Who's that person? Who do they report to? Who's on their team? What are their skill sets? It gives me a broader sense of who they are, and that makes me better at my job.



BOB WALTERS | PRESIDENT & COO

ROCKET Mortgage
by Quicken Loans

HR Shapes the Experience

Put People Over Spreadsheets

Mike Malloy is Chief Amazement Officer at Rock Central, which provides shared services to Rocket Mortgage. He oversees “The Pulse,” the company’s name for HR. His advice for building a better digital workplace and team member experience: “Take a long view of the culture.”

Taking the long view can feel out of reach right now, when we’re grappling with the immediate challenges of remote work and unexpected business hurdles. But that long view actually helped Rocket Mortgage transition to remote work in March of 2020.

“Numbers and money follow, they don’t lead.” Instead of being guided by the numbers, leaders made decisions based on what was best for team members. They started by trusting people, and did whatever they needed to support and empower them. In other words, they put people over spreadsheets.



Mike Malloy
Chief Amazement Officer

JOINED JUNE 2015

Skills

The Pulse Expert	■■■■	Servicing Expert	■■■■
Law Expert	■■■■	Public Policy Expert	■■■■

Interests

- Coaching Youth Sports
- Boot Camp Workouts
- Carolina Panthers
- Rugby

About me

Chief Amazement Officer--pretty cool title, and an even cooler job. I am so fortunate to have the chance to lead our Pulse, Focus, Events, and AV teams, and it is our goal to make every team member’s experience amazing.

Prior to my current role, I had the privilege of leading our 6 time (and counting) J.D. Power winning Servicing team. Personally, I am a recovering lawyer, sports dad and coach, former rugby player, and retired Goofy (yep--I was Goofy at Disney in 1989).

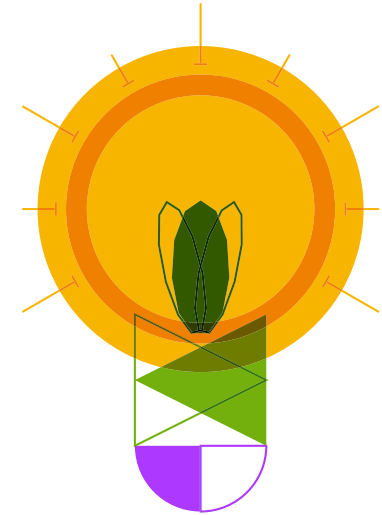
“There’s a strong desire out there in most organizations to grind things down to the last basis point,” Mike says. “We’re a very successful company, and we understand how to generate revenue and margin. But we don’t allow ourselves to get caught up in short-term thinking.”

In March, it took just 5 days to equip tens of thousands of team members to work remotely. “During that time, if we had just looked at the spreadsheet math, and we didn’t have trust or the right attitude, we couldn’t have done it,” Mike says. “We set up a drive-through. People would drive up, show their badge, and tell us what they needed – a laptop, a webcam, monitors. And they took it and drove off. We sent millions of dollars in equipment out the door.”

The mantra was “How can we accomplish this?” And the long view of culture meant leaders could welcome every idea, even if the spreadsheet said not to do it.

And instead of worrying that team members won’t do the right thing with all that equipment or their new hours working from home, he says that Rocket leaders ask,

*The mantra was
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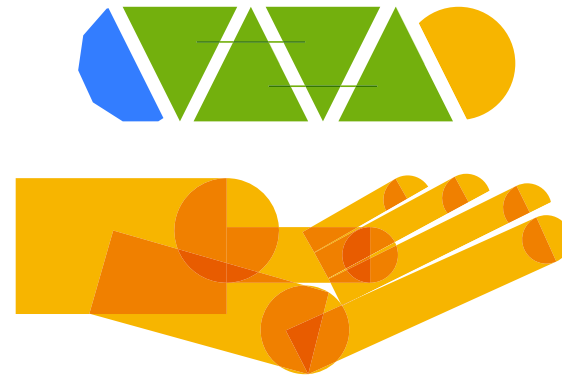


“How much better can we be? What can we do in this new environment that’s different? How can we listen, and how can we ramp up our communication to humanize this experience?”

Humanize Every Interaction

The buzzword “human-centered design” is popular in conversations about the digital workplace. And it makes sense that HR (human resources) should be at the center. At Rocket Mortgage, that is the goal.

Mike Molloy asks his teams: “How are we working together to personalize every interaction? How are we creating a warmer initial interaction with each other?” Rocket Mortgage uses Sift as their people directory. Before sending an initial email or joining a meeting with someone new, team members use Sift to understand more about the other person.



How much better can we be? What can we do in this new environment that’s different?

A human directory makes every interaction warmer.

“

When I use Sift before my first interaction with someone, I can humanize that initial contact. I'm not engaging with a stranger.



MIKE MALLOY | CHIEF AMAZEMENT OFFICER

ROCK
CENTRAL

Intentionally Craft the Experience

Rocket Mortgage is a big company with a lot of teams and resources, but we think organizations of every size can learn from the principles and ideas used by Rocket Mortgage. Here's one idea we love: a few years ago, the company formed an **"Amazement Team"** to intentionally craft and deliver amazing experiences to team members. This team is based in the HR function, but works cross-functionally on recognition programs, internal communications and team-building events – all of the elements outside the core work delivery that shape team members' experience of their jobs. They work as "cultural consultants" to teams throughout the organization.

Team-building events and recognition might seem like fun, fuzzy, or "nice-to-have" elements. But the decision to create the Amazement Team has been a competitive advantage and a critical momentum-driver for the overall culture at Rocket Mortgage. Creating a shared service just to build overall cohesion, identity, and engagement on teams is pretty revolutionary. Creating the Amazement Team shows that Rocket Mortgage isn't just talking the talk about culture; they're walking



Stephanie Hefner-Byrum

Senior Director of Amazement

JOINED MARCH 2003

Skills

QL Culture

Expert

■■■■

Leadership

Expert

■■■■

Empathy

Expert

■■■■

The Pulse

Expert

■■■■

Interests

ISMs

The month of October

Running

Admiring the night sky

Outdoors

Flamingos

What I do here

I lead a team that is obsessed with the team member experience, understands the needs of our business, and implements initiatives that allow our team members to be their best selves every day!

Amplify Your Experience

Languages

Cizaran

Fluent in Speaking, Writing, Reading, and Understanding

Theazis weazas meazy preazimeazareazy weazay eazof teazalkeazing teazo freaziends ieazn neazinth greazade.

the walk (and investing real time and money in bringing the culture to life).

If you're not focusing on people, the business won't survive.

When a team offsite is well-planned, intentionally branded, promoted, and measured – and when that pattern is repeated across teams, over and over – you start to see massive impacts.

Stephanie Hefner-Byrum is Director of Amazement.

Her advice to leaders who want to build a more “amazing” experience at work? “Start by listening. You could guess, but you really don't know [what people want and need] until you ask.”

Andrew Lemanek leads design on the Amazement team. His lesson from working at Rocket: “Take care of the people first. Show you care.” If you're not focusing on people, the business won't survive.



Andrew Lemanek

Director of Amazement

JOINED JULY 2005

Skills

Colorful Anecdotes

Expert

■■■■

Leadership

Expert

■■■■

Cat Whispering

Expert

■■■■

Company Culture

Advanced

■■■■

Interests

Comic books

Video & Audio Production

Pop Culture

Not Sports

Craft beer

What I do here

My team cultivates company culture to provide an enriching, meaningful experience through intentional design, messaging, digital media, interactions, and client service.

My days are filled with adventure, and I'm provided every opportunity and support to better my workplace, team, skills and accomplishments. I'm passionate about expressing myself, and relish every opportunity to work with and learn from talented individuals. Meow!

Awards

ISMs in Action: A penny saved is just a penny.

IT Builds the Infrastructure

The Digital Plumbing Has to Work

IT has a critical role in shaping and supporting the experience of work, especially when that work is happening remotely. I talked to Andy Picmann, whose title as “director of team member experience” means he oversees the technical elements that make work actually *work* for Rocket Mortgage’s 19,000 team members. Andy and his team oversee key collaboration tools like Microsoft Outlook, Teams, and Sharepoint and core systems like the company’s VPN.

In other words, they support the digital “plumbing” of the team member experience.

A lot of the tech that Andy focuses on is critically important for team members working remotely. “We’re talking about things that we usually take for granted. People are used to showing up at work and their internet works, their microphone and camera work, the screen settings are correct. They’re like air and water. But



Andy Picmann

Director of Team Member Experience

JOINED DECEMBER 2012

Skills

Leadership
Expert

Technology Leadership
Expert

Smoking Meat
Expert

Boat Captain
Expert

Interests

Boating

U of M

Football

Dogs

Technology

About me

I am a technology leader that loves people, going up north, my dog Bella, my wife Tracy, smoking meat, and anything Maize and Blue.

Go Blue!

Languages

German

when you're at home and something's not working, it's a huge issue. **If these things are working well, you don't even notice them. But if they're not, you're almost inoperable."**

"If these things are working well, you don't even notice them. But if they're not, you're almost inoperable."

Think "Outside-In"

Brian Woodring is Chief Information Officer at Rocket Mortgage. He directs the culture of the company's tech teams and guides digital strategy.

One of his guideposts is operating as an "outside-in" company.

"Outside-in" companies start with the client. They ask, what does the end user want from us?

How could we most seamlessly deliver it to them? They don't bother the customer with the internal workings of the company.

The customer doesn't realize when they're being passed across organizational boundaries from one team to another. They don't see the seams between teams.



Brian Woodring
Chief Information Officer

JOINED NOVEMBER 2017

Skills

Software Engineering

Expert



Data Architecture

Expert



Delivery Management

Expert



Machine Learning

Expert



Interests

Family

Technology

History

Tennis

Not Hockey

About me

My career goals, in no particular order:

- To ship products that make our clients feel confident and happy.
- To grow teams that have a shared sense of purpose and mission.
- To bring out the best in everyone I work with.
- To help make the people I lead stronger and more secure.
- To be kind and encouraging whenever possible.
- To constantly learn and be better.

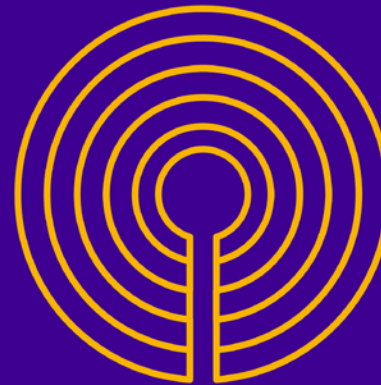
The company builds the experience the user needs, and they find a way for the technology to support that.

On the other hand, “inside-out” companies focus on themselves first. They can get bogged down in their own org chart, which makes it hard to see the end customer’s perspective and needs.

Most tech companies are “outside-in” when it comes to customer experience, and Rocket Mortgage definitely is. But Brian says that it’s time to apply the same “outside-in” mindset to the team member experience. “We think of our internal tools, like Salesforce or Microsoft Teams, or Sift, as a product that we roll out to our customers – our team members. We think like product managers and we treat our internal users like customers.”

Brian sees this approach as the future for enterprise technology. As we all get used to having easy, fast tools in our personal lives (as consumers using Google, Amazon and FaceTime), we’re not going to put up with clunky

Outside-In Approach



**Begins with
the team members**

Focuses on needs, expectations,
and fears of the employees

How can we make their
daily tasks seamless and
feel effortless?

Inside-Out Approach



Begins with the org

Focuses on managing human
capital to align to business needs

How can we increase our
headcount to meet
market demand?

Tools don't create culture on their own, but they unlock the ability to create great culture.

technology at work. "All of us are becoming savvy critics of technology," he says. That shift in team member behavior and

sophistication is driving Rocket Mortgage's digital workplace strategy.

"You can't have one set of rules when building for customers, and a different set of rules when building for team members. You have to put the user first."

Finally, Brian says the technology and the culture should work in harmony: "Tools don't create culture on their own, but they unlock the ability to create great culture."

When the Digital Experience IS the Experience

Dan Waleke is Chief Information Officer at Rock Central. He says he's proud of how quickly the company shifted to working remotely in March, and points to important infrastructure that was already in place.



Dan Waleke
Chief Information Officer
JOINED SEPTEMBER 2002

Skills

Courageous Authenticity
Expert

Leadership
Expert

Linux
Expert

Systems Engineer
Expert

Interests

Technology

Home Theater

Nintendo Switch

NASA Pro Racing

German Shepards

Tesla

What I do here

I get to work with a group of smart and talented people driving Technology solutions as part of Rock Central.

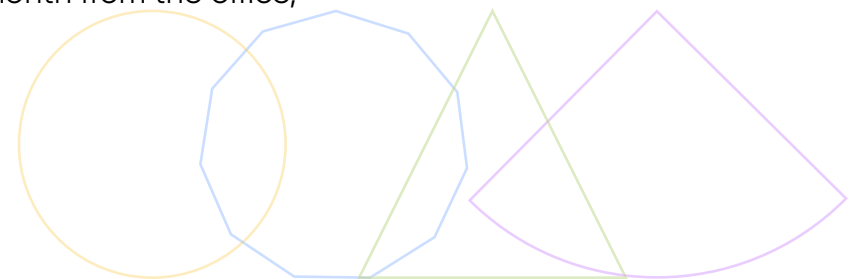
About me

Culture Warrior, Gut check expert, Curious, Seeks to Understand

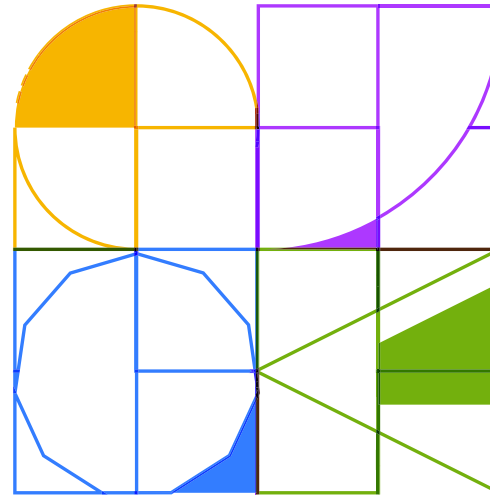
But he highlights an important nuance that should be on every leader's mind as we look to the future: There's a difference between getting set up to work remotely for a short period of time, and getting set up to work remotely for the long-term. We can all adjust and work with what we have in the short term, but a longer-term move to remote work will require a new strategy.

Critically, as our collective time working remotely stretches on, leaders are having to think about new team members. Leaders at Rocket Mortgage have had to figure out how to hire and onboard thousands of new team members who have never set foot in one of the company's offices. In their case, their entire team member experience is a digital experience. That fact raises new questions about what the digital workplace should look like, how leaders can connect people and build community, and how to keep team members engaged and excited about their work.

As the leaders at Rock Central and Rocket Mortgage plan the company's eventual return to an office setting, they're likely looking at a smaller percentage of team members working full-time from a company office. The value and possibility of widespread remote work have been proven now. "Some people might come back full-time, but others might work just 1-2 days a week or 1-2 days a month from the office," he predicts.



In that case, it will be important to think about why we come to the office. Is the office for teamwork and collaboration, while heads-down focused work is done at home? If so, we'll need to reconfigure the tools we use both in the office and in remote work locations to best support those needs.



For other tech leaders who are building the technical infrastructure to support a new way of working, Dan's advice is simple: Break it down into small pieces. Tackle the one thing that will have the biggest impact first. Solve that challenge, then rinse and repeat through your list of priorities.

Break it down into small pieces. Tackle the one thing that will have the biggest impact first.

The right tools unlock your ability
to create great culture.

“

The first thing I do when I hear someone's name is look them up in Sift. Sift allows us to build community. It helps me learn something about other people before I talk to them. It's like magic.



BRIAN WOODRING | CHIEF INFORMATION OFFICER

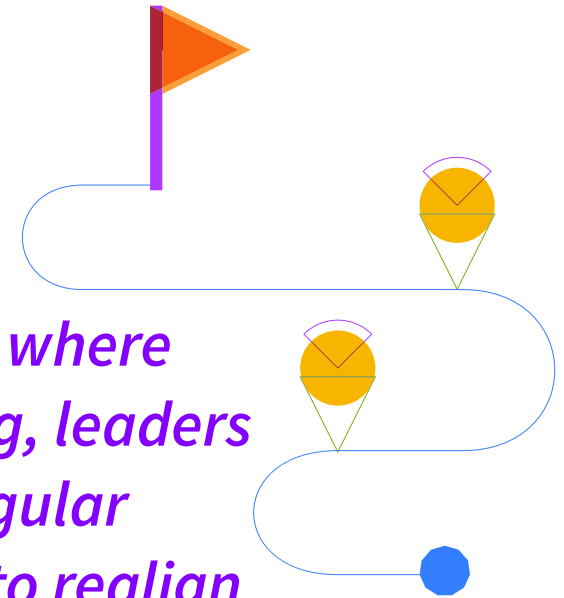
ROCKET Mortgage
by Quicken Loans

Putting It All Together

We've walked through all of the pieces that Rocket Mortgage needs to successfully bring people together around a shared mission, build a cohesive culture, and create a digital workplace that drives business success and team member engagement. Hundreds of people on many different teams, in executive leadership, HR, and IT all have to work toward shared goals. They have to speak the same language. And at such a big organization, in many cases these people don't even know each other. But it is their shared culture that has resulted in an end product that works.

Stephanie Hefner-Byrum, Director of Amazement, describes one way that company-wide collaboration is built into her routine. On a regular basis, she meets with a cross-functional group for a "Driving the Culture" meeting. In the meeting, they look at how team member engagement is going – they review the latest survey data and current metrics, like how many hours team members are working and what feedback they're sharing about their work experience.

Even at an organization where culture is king, leaders have built regular checkpoints to realign their focus.



Their goal: to keep leaders focused on the team member experience. When business is booming, like it is at Rocket Mortgage this year, it's easy to just focus on production – what's happening with customers. But Stephanie says these “Driving the Culture” meetings look at both the business metrics and internal engagement metrics.

This intentional collaboration is an important part of the Rocket Mortgage story. Even at an organization where culture is king, leaders have built regular checkpoints to realign their focus. They continuously push themselves back to a core priority: taking care of their people. That's a lesson we can all learn.



Your Turn: How to Build a Stronger Employee Experience

There's a lot to learn from how Rocket Mortgage has built and refined an award-winning team member experience through collaboration and innovation. But even if you're in the early stages of understanding and improving your employee experience and crafting a digital workplace, you can take key steps right now.

Leaders: Update Old-School Business Processes

While individual departments like HR and IT have important roles to play, there are bigger issues we need to address before we start assigning specific tasks.

Mark Stelzner advises companies on complex transformational projects as founder of the HR consulting firm [IA](#). He says that while we're seeing rapid digital transformation and a largely successful move to working from home, we're missing an important overarching piece. "We haven't transformed our processes and policies to meet this new moment," he says. "We need a more agile and fluid approach to our digital workplace strategy."



Mark Stelzner

Founder/Managing Principal of IA

25+ YRS OF HR TRANSFORMATION EXPERIENCE

Skills

Attention to Detail
Expert

Natural Curocity
Expert

Humor
Novice

Transformation
Expert

Interests

Slow Running

Voice Acting

Unbiased Advice

Distilling large amounts of info into key points

About me

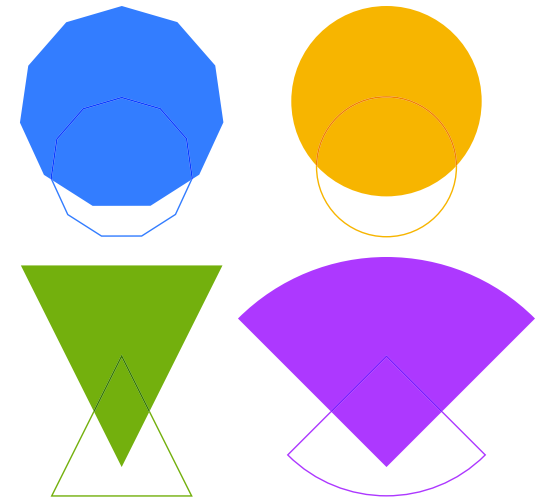
With more than 25 years of HR transformation experience, I have spent my career fostering relationships through attention to detail, natural curiosity, and a self-deprecating sense of humor. By offering unbiased and candid advice to C-level leaders in nearly all geographies and vertical market segments, I have brought over \$3.5 billion worth of value to my clients and employers.

C-level leaders can get a bird's-eye view of some of these broken processes and update them for the modern digital workplace. For example, Mark points to the standard corporate budgeting process. HR might develop a business case for a new system they want to implement, but they may not be aware of the IT costs that project will involve.

When IT reviews the budget, they may add additional costs like information security reviews, architectural design and validation, integration builds and testing (and the list goes on). If HR doesn't have ownership over their projects and understand the full costs, their projects won't be approved. Mark's suggestion: Develop new prioritization models to implement the most pressing, highest-impact digital workplace solutions first.

HR and IT: Establish a Shared Vocabulary

Traditionally, HR and IT use very different language to describe their work. As mentioned previously in this ebook, HR tends to talk about "employee experience" (the human side) and IT talks about "digital workplace" (the technical side). It's important to understand other people's language, and to start defining a shared vocabulary.



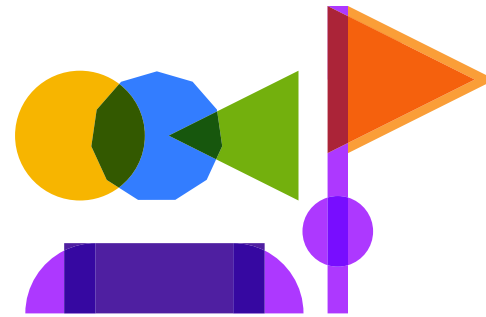
Develop new prioritization models to implement the most pressing, highest-impact digital workplace solutions first.

Are people “users” or “employees”? Are you working on the “user journey” or the “employee experience”?

If you’re in HR, are you thinking about technical considerations like data structure, architecture, and integration? Do you talk about “friction” in digital experiences? As we live through a digital revolution, every leader has to be a technical leader – or at least understand the technical vocabulary that is now thrown around in every meeting.

And on the flip side, if you’re in IT, are you considering the human impact of tech? Do you roll out internal technology with a focus on employees as high-value “users”? Are you working to make every digital experience easy and intuitive?

These words matter, partly because they show our counterparts on other teams that we understand their priorities and the way they think.



*As we live through
a digital revolution,
every leader has to be
a technical leader.*

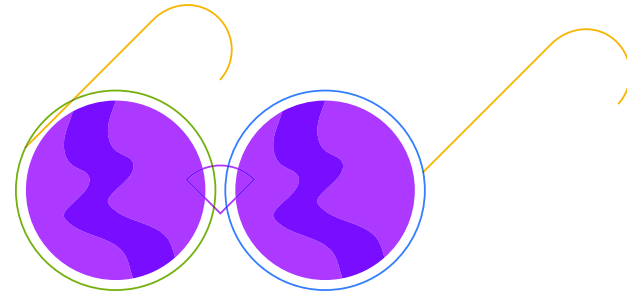
Everyone: Focus on the 'Moments that Matter'

Finally, it's worth remembering that this conversation about the "employee experience" and the "digital workplace" is really about individual human experiences. The end goal is that the humans who work for your organization feel supported, connected, and able to do their work.

Employee experience isn't about any one tool or platform. As Mark Stelzner says, "It's a foundational principle, not an outcome. You can apply the lens of employee experience to any process."

So, look for the moments that matter for people in your organization. What does the employee journey look like, from onboarding forward? What are the moments that need attention and improvement? Where do people get stuck, frustrated, or burned out? What are the most high-impact moments that you're hearing about?

If fixing your "employee experience" feels like too big or vague of an endeavor, zoom in on those core moments that matter. In the end, improving those moments will go a long way toward creating a workplace that supports and connects your people.



You can apply the lens of employee experience to any process.

Ready to Get Started?

Here's Your Homework → → → →

Let's review. If you're thinking about how **you** can shape the employee experience at your organization, think about these steps.

1. Identify the most important common experiences.

To identify your "moments that matter," think about common experiences that most people experience. Some good examples are onboarding (joining the organization), collaborating with other people, and accessing important files. You could also consider major life events (birthdays, marriage/divorce, welcoming a new child) and work milestones (work anniversaries, performance reviews, and learning milestones).

2. Understand what those experiences look like now.

Gather all of the information you can about those experiences. Let's use collaboration as an example. Map out all the steps someone has to take in order to find someone, connect with them, and work together on a project. Ask people: When you need to collaborate, how do you do it?



3. Find the gaps.

Once you understand what the current experience is like, you can start to focus on the gaps. Where are people frustrated? Where are the problems?

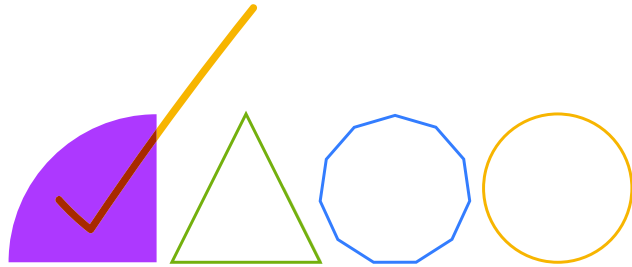
4. Start working on a solution.

Now you can start thinking about how you might solve the problems in your core, common experiences. What technology, training, and documentation do you need to improve the experience? Who should be involved in solving the problem?

5. Keep the end user in mind.

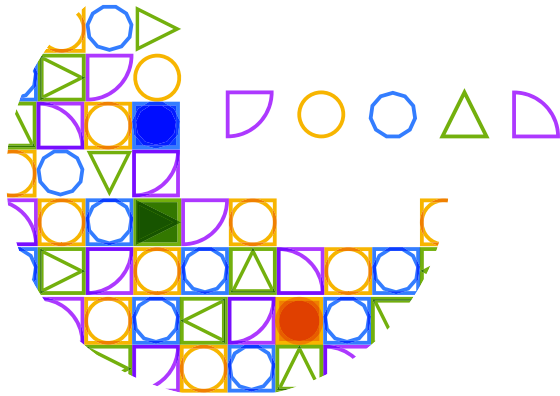
The most important part of driving the employee experience? Keep the end user (the employee!) in mind. Let them be your North Star. If you can consistently focus on the individual employee, and their experience when they log in to work, you'll make the right decisions.



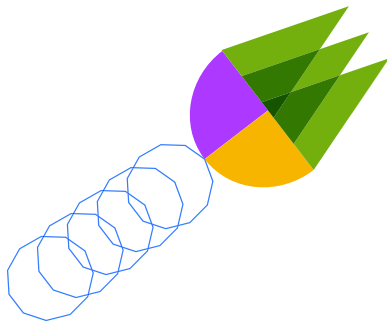


so remember...

The employee experience isn't a box you can check.



Building a better employee experience happens slowly, with small pieces you lock into place every day.



Eat the elephant one bite at a time.



Work better, together. The powerfully simple people search engine that speeds collaboration and your pace of business.

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