




Buyer's Guide

The Buyer's Guide to Employee Experience Solutions



workleap
Officevibe

Let's embark on a  step-by- step journey to discover your team's best employee experience solution. By the end of this guide, you will better understand which stakeholders to address and what questions to ask in the buying process. Finally, to make sure you cover all your research and planning, we offer worksheets  that give you room to think and follow through.


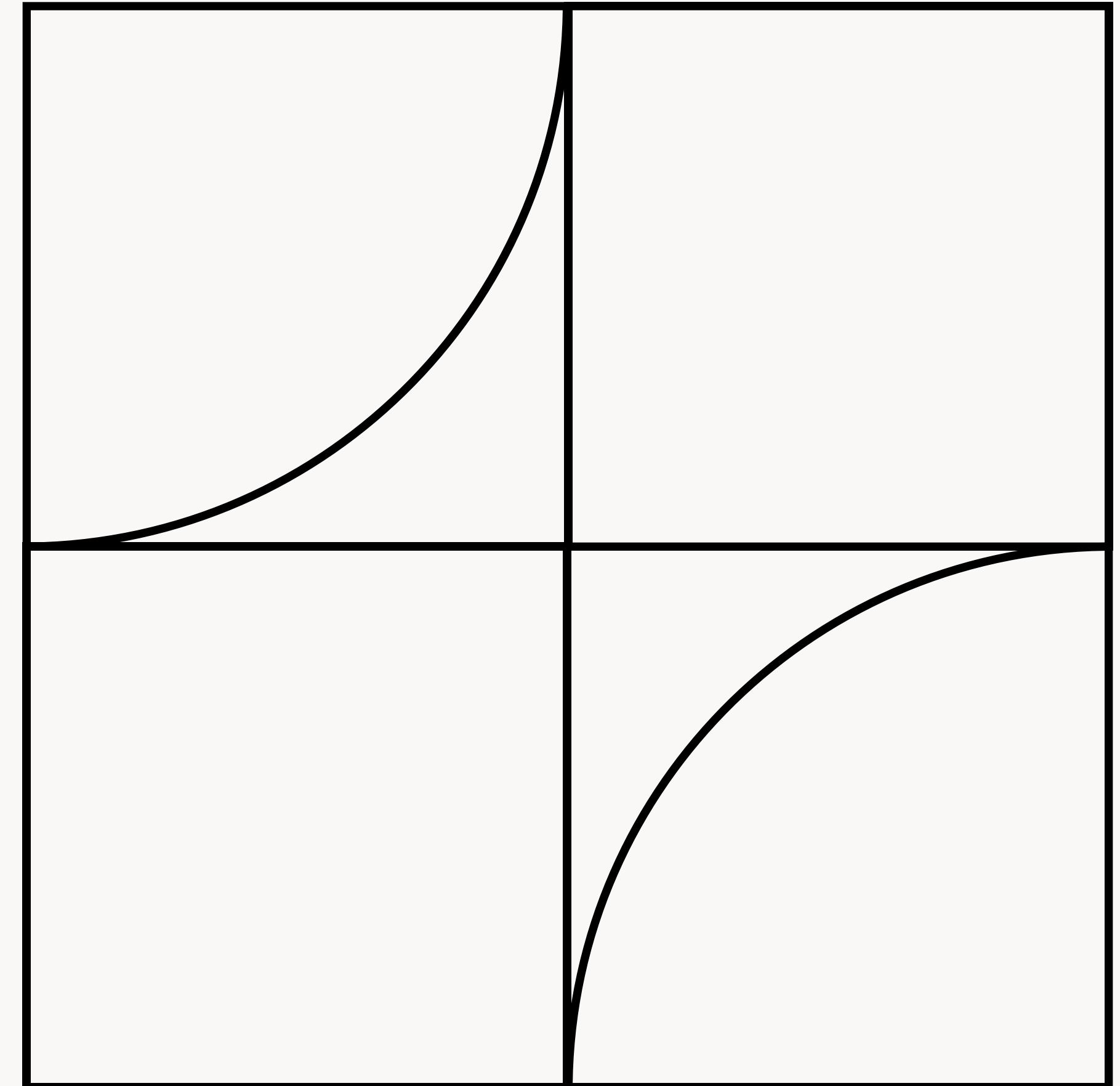
Why listen to us? In 2013, we needed an employee experience solution to keep our culture thriving. So we  built it ourselves. Keeping our teams in sync is a journey we take every day. Some (ok, many) call us experts on the subject!

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Employee experience is a high priority for HR

The employee experience (EX) is every moment of connection and interaction an employee has with a company. People, culture, processes, and technologies shape the quality of the experience.

The need to hire continues to be a pressing priority for HR. As of June 2022, job openings in the U.S. still outnumber the available workers by almost 2 to 1 (CNBC). Smart organizations understand that turnover and talent acquisition depend highly on employee experience. To create a thriving employee experience, it's helpful to understand the current challenges and opportunities of the landscape.

Distributed teams can lead to an EX challenge

Organizations increasingly rely on hybrid and remote teams since they allow access to talent worldwide – creating the opportunity for broader diversity in gender, age, culture, and experience. However, working from anywhere can present unique challenges to HR leadership and team leaders looking to drive a better employee experience.

Something as simple as time zone issues (especially if you have international team members) can become a hidden problem. Spontaneous meets, impromptu advice, and friendly get-togethers can be harder to recreate across distributed teams who rarely meet in person. As a result, the lack of real-life human connection can leave team members feeling disconnected and invisible.

Connecting employees to company purpose helps drive a better EX

Connecting your employees to your organization's mission and purpose improves employee experience and retention. Recent research by Gallup demonstrates that by uniting employees to the organization's purpose, you can realize a:

- ✓ 51% reduction in absenteeism
- ✓ 64% drop in safety incidents
- ✓ 29% improvement in work quality

The employee experience can also influence an employee's likelihood to recommend an organization to other high-talent individuals.

Improve retention and turnover with attention to EX

Taking care of your people is the best way to face the changing tides of today's market. When your teams are engaged and feel like they are heard and supported, they are more likely to be happy in their roles and stick around.



Calculating the cost of turnover and the potential savings in reducing it through better insight and analysis is a key input to your business justification for an EX tool. According to LinkedIn, the turnover of hourly workers in 2022 costs an average of \$1500 per employee. This cost jumps to 100-150 percent of salary for more technical positions, and for those in the C-Suite, it can be a whopping 200% + of salary.

Employee voice is the most important factor in EX



This (the voice of the employee) is a critical business process. Employee sentiment, feedback, and voice are not only important for hiring, retention, and engagement — they are a direct representation of your customer experience.”



Josh Bersin

Global HR industry analyst

That said, it's no surprise that organizations worldwide are investing time, money, and energy into their employee experience. Never has the battle for talent been so intense. As Josh Bersin puts it, becoming an irresistible organization is now more important than ever to attract newcomers and retain your people. Carefully crafting work experiences that feel human and tailored is what the future of EX will be all about.

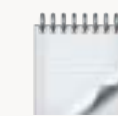


The key to getting those insights on what makes EX work? Gather data unique to the people and the organization — and the right employee experience software to help you do that.

Enhancing Employee Experience With Software

According to Peter Drucker, author and influential thinker on management, **“you can't manage what you can't measure.”** Without tools to help you measure and take action, your employee experience falls behind.

The best employee experience software not only enhances your employee experience but offers actionable insights as well. Let's explore how to discover and purchase the best employee experience software for your organization.



As you walk through the steps in your analysis, keep a copy of the worksheet at the end of this guide nearby. Use it to pencil in your thoughts, questions, and concerns as you go through your buying journey. Start with your assessment and move through the worksheets until you can determine your ROI.



Key questions to ask when choosing the best EX software solution

Picking the right EX software begins with asking yourself and your team members critical questions about your organization's wants and needs.

Why are you looking for an employee experience solution?

Are you looking to:



Build team connections to develop a stronger sense of belonging



Improve engagement



Create reliable retention



Drive employer brand recognition to enhance recruitment



Prioritize and strengthen company culture



Deliver impactful initiatives



Identify drivers of performance



Manage experience in and across remote and distributed teams



Navigate organizational change



Improve retention and ambassadorship



Take note of these answers as they will play a role in dictating your choices and decisions.

What are the parameters for your solution? For instance, does it need to be a continuous collection of feedback and engagement metrics for every team and department in your organization?

Knowing what you need from an EX solution is more than thinking about what you need today. It's best to consider whether it will grow and scale with your workforce's needs. As your program grows, what you need today must also feed what you will need in the future.

Does it need to be scalable and low maintenance? (e.g., cloud-based, Software-as-a-Service)

Thinking about your software infrastructure is essential. Do you have the capacity to house your own software and then staff people to maintain it continuously? Or is a cloud-based, Software-as-a-Service solution better for you?

Who will use your solution? Will it need to deliver targeted insights to specific managers?

This is important. Besides having fun and engaging EX software in your teams' hands, how you use the information is crucial. It takes more than the standard eNPS question to spark improvement, engagement, and retention. As a leader and decision-maker, you'll need ways to dissect and understand the data and deliver it to those that need it the most. Reporting and dashboards are good features to look out for here.

How will you gain user adoption?

Adoption goes beyond merely training employees on the new tool. The platform should be simple and practical for managers and employees using it to take action. Sometimes user adoption is as simple as including them in the decision process, such as trials and getting input before the rollout. Some EX solutions offer superior support and resources to help guide you with best practices and initiatives for better user adoption.

How will you track usage and value?

You will need to be able to show ROI for your investment. To do this, you need to understand how to track usage and translate that to value to maintain and grow your program. Survey participation numbers and engagement tracking over time are some indicators to watch.

Can you build your solution? And should you?

Should you build or should you buy? Creating your solution may be possible if you have a team of talented developers focused solely on the project. It depends on the time, talent, and budget you have for the project. We'll talk more about this in the next section.



Not all employee experience solutions are created equal

Not all EX solutions are alike. Some are more robust than others, and some only scratch the surface of what is possible. We've identified three levels of solutions to evaluate. You may find yourself already using one or more of these, but if you are looking for something new, consider the next level of solutions to improve and grow your EX program.

THE PROS OF THIS STAGE ARE:

THE CONS OF THIS STAGE ARE:

LEGACY AND DIY

You're starting off using an EX software. You often rely on yearly satisfaction surveys that have been around for decades.

- You have a window into how the culture changes year over year
- Leaders understand measuring employee satisfaction is important
- Your teams become used to taking annual surveys

- One snapshot in time does not account for quarterly, monthly, or weekly moments that matter
- Often disconnected from real-time actionable insights
- Without action, employees may feel surveys are useless

BASIC

You use an EX software solution that covers some fundamentals, usually reliant on the NPS question.

- You have a quantitative window into organizational EX
- You can report trends within the year vs. just year to year
- Your teams become habituated to more uniform surveys

- Using only NPS questions may not adequately give insight into the "why"
- Without the qualitative "why," it can be detached from real-time actionable insights
- Without action, employees may feel surveys are just another task they have to perform

ADVANCED

You're using the highest level of solution. It provides not only the basics for EX but also pulls together actionable insights and delivers them in a way that drives success.

- Your EX information is always available, up to date, and ready at your fingertips
- Leaders and managers are equipped with support knowledge and guidance for actionable insights
- Your teams feel both "seen" and "heard"

- You will need a strategic plan for driving a culture that takes action. Sometimes, your software will offer support/guidance at this level, but you can be left on your own
- Tight budgets may cause push back on costs associated with this level of sophistication
- It requires an openness to change management and training around action

How to handle introducing something new: don't do it alone

When introducing change — like a new employee experience software solution — it's essential not to make the buying decision in a bubble. You know your needs, but you must also understand those of your colleagues and the entire organization. No easy task!

To identify the business challenges, you need to ask the right questions and work as a team.

On management

- How do we provide our managers with timely and relevant support?
- How can we improve our managerial skills regarding tough or important conversations with employees?
- How can we consolidate all the information our teams need to be aligned?

On measurement

- How can you easily measure employee engagement when there are so many different variables that are constantly shifting?
- How can we get consistent, regular participation to track changes over time, be proactive, and take action?

On trust and connection

- How can we create a climate of trust and transparency?
- How can we build social acceptance and connection?
- How do we connect employees with purpose so they can see how their contributions make a difference?
- Is there a better way to promote recognition other than relying on transactions?

You may also want to ask stakeholders:

- What's the biggest EX problem you struggle with? Visibility? Communication? Time?
- What insights do you need from us to help you solve that problem?
- How and when will you know if the problem is solved?
- What kind of reporting or analysis do you need? Are industry benchmarks important to you?



Once you clarify the business question, summarize it, write it down, and get an agreement from the team involved in the buying process. [Gartner](#) calls this step “consensus creation.” Consensus creation is the time to build a shared understanding of the problem among the team involved.

Collaboration

Through collaboration, you'll be able to frame the business question — whether that question is about how to increase engagement, reduce turnover, improve the employee experience, or something else. Because an EX tool is an organization-wide solution, it's crucial to understand the company-wide problems it needs to solve. To develop this understanding, liaise with key stakeholders, including:

❑ EXECUTIVE TEAM

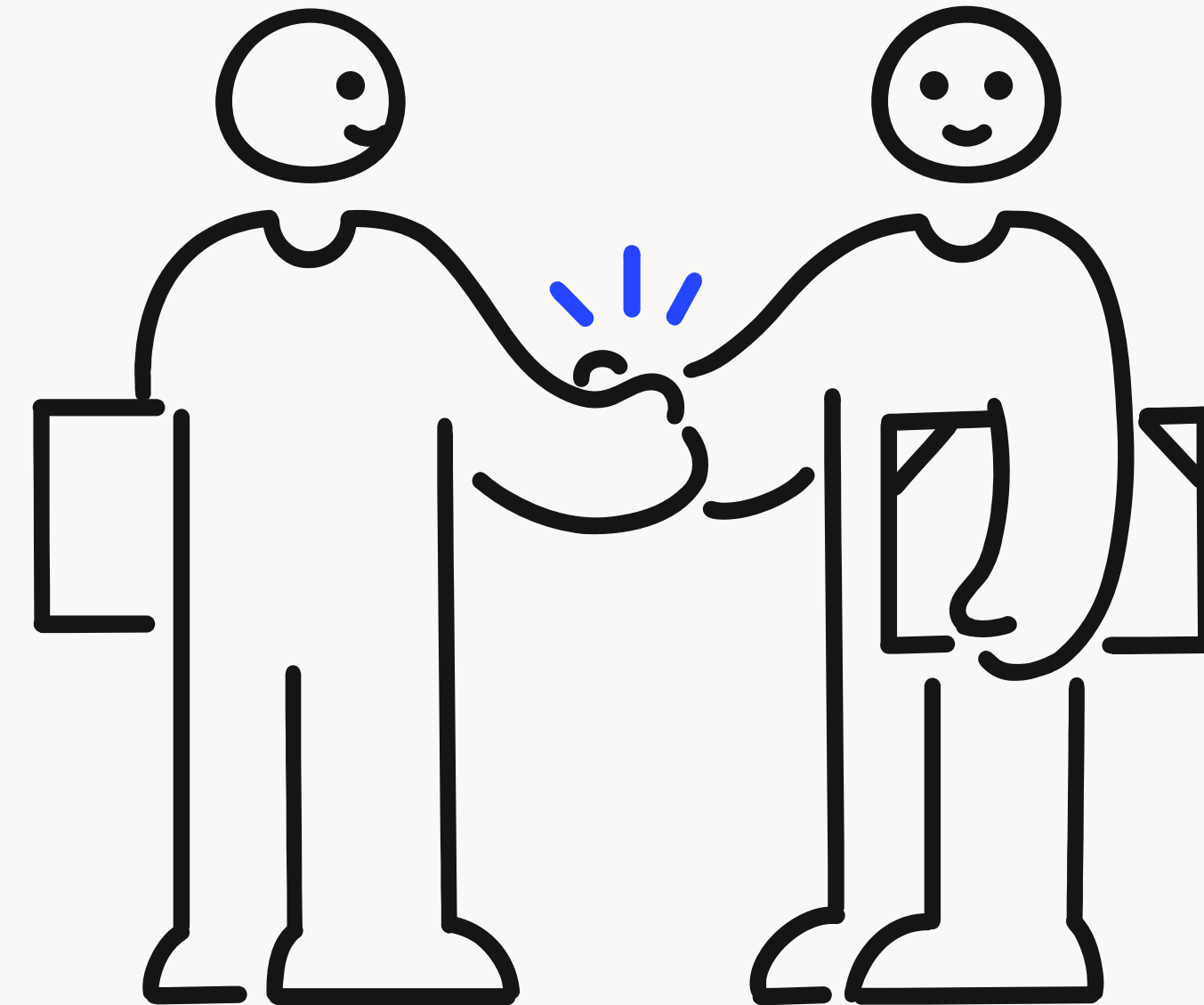
The executive team will want to understand the solutions' ROI and business advantages and how it feeds into overall business goals. They'll also want to know how it'll easily give them important information.

❑ HR BUSINESS PARTNERS

They work closely with the business, understand their workforce challenges, and use workforce data to craft solutions to help their internal customers solve them

❑ LINE MANAGERS

Managers work closely with employees, understand their daily priorities, and recognize how their tasks relate to company strategy. Trends and benchmarks can help them make sound decisions about promotions and succession.



❑ EMPLOYEES

It's essential to be open with employees about the intention to use EX software. Take the time to understand their concerns and explain how the software will improve their working lives—this will also help the uptake of user adoption.

❑ FINANCE

Tighter collaboration between HR and finance ensures both business functions can boost the employee experience. Leverage the needs of finance to recruit them as a stakeholder in your project.

Managing important people requirements

EX software helps HR take action and meet the goals of its biggest challenges. Reducing turnover and managing engagement are just a couple. Every organization has different needs. Maybe you want a tool to accurately forecast hiring needs or one that makes it easy to share important information.

Here's how an EX solution can solve some common business problems:

❑ ABSENTEEISM/PRESENTEEISM

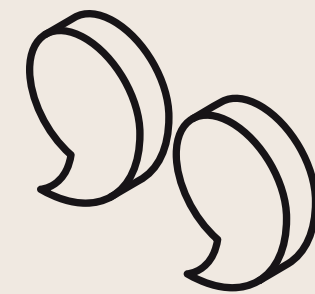
For decades, [Gallup research](#) has shown that engaged workplaces see lower absenteeism and higher presenteeism. Having a finger on the pulse of your EX can give you a targeted view into engagement and take action.

❑ RETENTION/TURNOVER

Using an EX tool, you might discover that a group of employees in danger of leaving all have something important in common: e.g. the same manager, never having been promoted, or being part of a minority group. Armed with that data, you can put together a plan for leadership and managers to find the root cause of turnover and implement change. Calculating the cost of turnover and the potential savings in reducing it through better insight and analysis is a key input to your business justification. According to LinkedIn, the turnover of hourly workers in 2022 costs an average of \$1,500 per employee. For more technical positions, this cost jumps to 100-150% of salary, and for those in the C-Suite, it can be a whopping 200% + of salary.



I truly believe that Officevibe has had an impact on our retention. It's really improved our relationships and decision-making.



David Legendre

Partner and VP of account services-production at Ig2

Understand what product features best help you solve the problem

Different vendors offer different features. Here are some examples of common and important product features and what problems they solve:

❑ PULSE SURVEYS

An employee pulse survey is a survey that's sent to employees at regular intervals to measure their levels of engagement in their work and their organization. Unlike an annual employee survey, pulse surveys provide more accurate, real-time insights for managers and leaders and help them track engagement trends over time. How? By asking fewer questions more frequently. This also avoids biased responses and survey fatigue. Pulse surveys should be fast and easy for employees to answer, as they are designed to gather quick feedback so leaders can understand how people really feel.

❑ SURVEY ANALYSIS

Pulse surveys are a great feature for HR leaders, but you have to know how to act on them. Complete employee experience solutions give you the tools to analyze your survey results through reporting, dashboards, and rich visualizations, so you can measure

the impact of your HR programs and benchmark your engagement data against similar organizations or industries.

❑ FEEDBACK

Feedback features allow users to probe deeper into survey responses, clarify specific answers, and open productive conversations. Essentially, a feedback tool should give employees a space to share their thoughts. From that, managers and leaders can build better rapport and collect relevant insights to inform their decision-making. An ideal employee feedback tool integrates into your workflow, so that gathering feedback becomes part of your company culture and regular practices.



There are always comments coming in that are very impactful. Sometimes it's just showing you what you're doing well, but it also shows you what you can improve on. Check them daily. And make sure you use Officevibe as a means of communication with your employees. When they get a response and see the impact of their words, that's when it's really working.



Kristin Heckersbruch

Culture and People Manager at Nolk

❑ GOAL - TRACKING

If you want to assist managers and employees with keeping track of overall business and personal development goals, you need to start goaltracking. Goal-tracking allows managers and employees to have greater visibility into the goals they are working toward and to plan accordingly. The software should get extra points if it makes goal-tracking fun and engaging.

❑ 1 - ON - 1 ' S

One-on-one meetings should be an uninterrupted time for managers and their direct reports to set goals, discuss projects, review performance, and remove blockers. They're also an opportunity for managers to get to know their employees more personally. One-on-one meeting tools should help facilitate all of this with ease and help in planning, note-taking, follow-ups, and relationship building.

❑ RECOGNITION

According to Workleap Officevibe data, 30% of employees do not estimate that their organization provides continuous recognition. However, recognition is proven to boost employee engagement. Many employee experience solutions integrate recognition features in their offering to make sure that all employees are recognized for their hard work.

❑ TEAM LEADERSHIP

Managers are an important part of a great employee experience, so you want to make sure they're equipped and feel supported with all the tools they need to succeed. From feedback guidance to ready-to-use templates, there are many ways EX solutions can help your managers grow in their roles.

❑ SUPPORT

Although not technically a feature, customer support is a critical element you should consider when you evaluate solutions. The support team should help you during your onboarding period and help you with any potential questions that may arise throughout your journey.


❑ WORKFLOW INTEGRATIONS

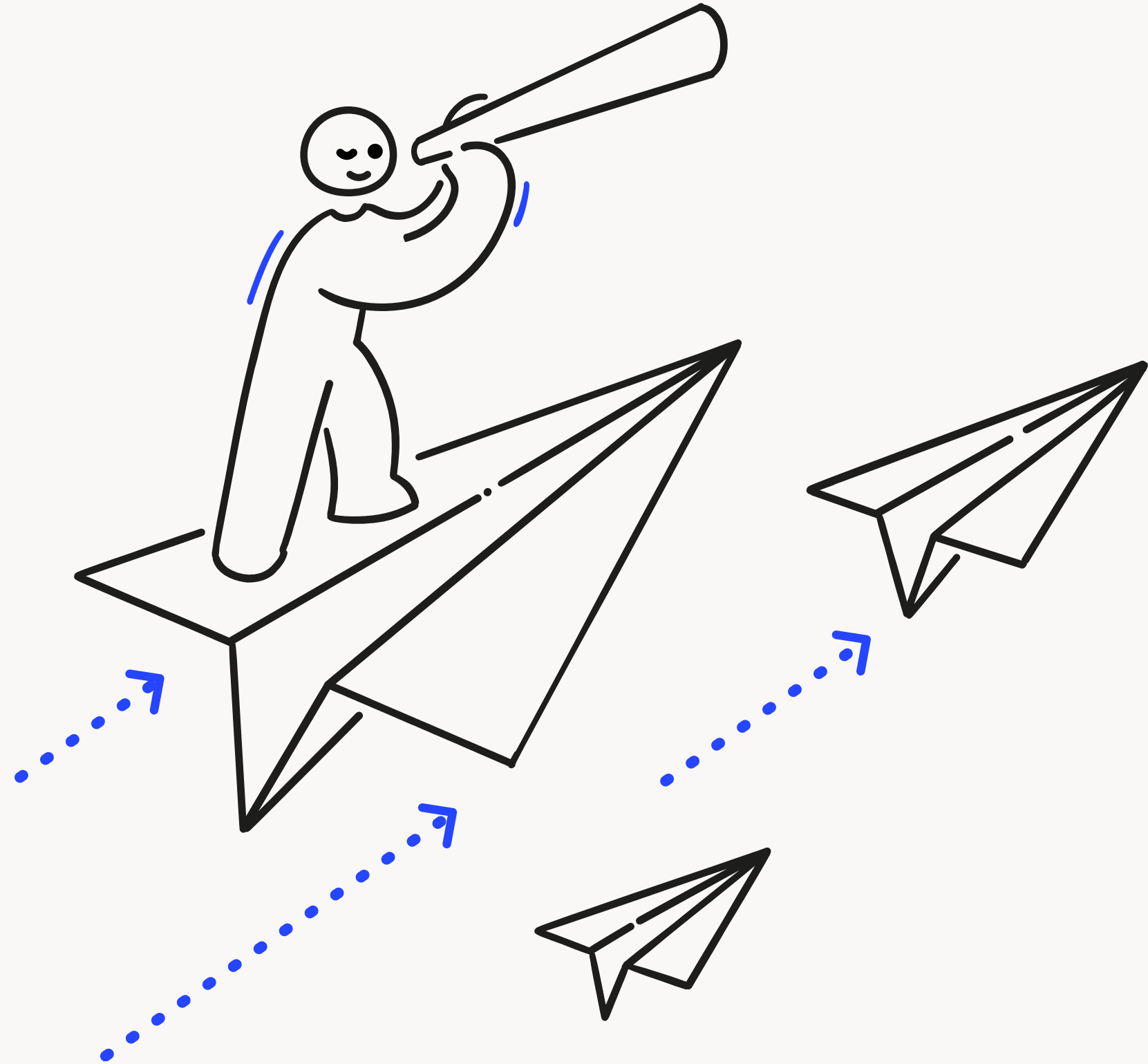
Integrations are key to encouraging user adoption and participation. If you need to facilitate conversations and action right in the flow of work no matter where your teams are, you need a software that connects with your current workflow tools. There are many options out there to consider. Understanding your own needs is just as important as understanding the various offerings in the market—especially when you are tasked with picking a software that fits your organization and moves the needle on your employee experience goals. Once you have a better idea of what you're looking for, you can be more detailed in your evaluations of different software vendors.

Shortlist of EX solution vendors

To give you an example of how to compare vendors during your search, we've created a shortlist of top vendors that include Workleap Officevibe.

Remember: different solutions have different approaches. Try to look for a software that shares similar values to your organization's.

 Compare "apples to apples." Fill out this table during your vendor research before you schedule any demo



EX SOLUTIONS EVALUATION CHECKLIST

FEATURES/ BENEFITS	WORKLEAP OFFICEVIBE	LATTICE	15FIVE	CULTURE AMP
Anonymous pulse surveys	✓			
Survey report sharing to all employees	✓			
Custom manager surveys	✓			
Employee feedback	✓			
Anonymous messaging	✓			
1-on-1 meetings	✓			
Goal setting/OKR tracking	✓			
Workflow integrations	✓			
Recognition	✓			
Team leadership tools	✓			
Support	✓			

Get the most out of your demos

The next step in the buying process is to get walkthroughs from your top three candidates. When you do, you want to ensure you get the most out of them. We have three keys to help:

1 Come prepared

Be prepared by bringing use cases and scenarios that are important to you.

- Ask the vendor to show you how they handle the use case.
- Look for solutions that help with your pain points.

Study the solutions page of the vendor.

- Have your worksheets ready and compare what they say on their website.
- Check reviews and case studies to see what others think of the software and the pain points they solved.

2 Ask questions

This seems simple enough but can be challenging to do. Why? Often demos are quick; the presenter is well versed in the software and seemingly floats from point to point. Ask them to slow down. Think about how it will look when you start to use it. Ask about how it solves your current pain points, why they have parts of a solution you never thought about, how you can integrate it into your existing workflows, and how it will grow as your processes grow.

3 Record the demo

Ask if you can record the demo or if they have a similar pre-recorded one you can access later. That way, you can go back and review it. Once you've seen three demos, it might be difficult to remember some specifics or differentiators for each solution. If you have a recording, you can go back, and it will spark your memory of what they offer and how it helps you get the tangible business outcomes you're seeking.

Ready to make your purchase?

You're finally there. After asking the right questions, reviewing features, evaluating products, and joining demos, you're ready to choose which employee experience solution is the best for you.

Loop in your procurement team to help with the purchasing process—they usually have before sign-off on all new software. Procurement will help coordinate with:

Finance

They ensure your solution's cost is within budget and identical to advertised.

Security

They ensure your solution's security policy is aligned with your company's best practices. Security credentials should be available on your platform's website.

Legal

They ensure the contract is legitimate and that there are no clauses that may affect your organization negatively in case of contract termination, along with other considerations.

Compliance

They ensure your solution fits in the company's technology ecosystem. If you want to make the process easier for them, look into potential integrations of your preferred platform ahead of time.



All clear? Perfect! When all stakeholders are on board, you're ready to go.

Create the conditions for great work

Congrats! You've done a lot of work to move thoughtfully step-by-step through discovering and purchasing the right employee experience software for your business. With the right solution, getting started doesn't have to be complicated.

Lead with heart and create space for real talk for your teams with Officevibe. Let us help you so that you can focus on what matters most: your people.

With Workleap Officevibe, your managers are equipped with a suite of tools to understand their team's needs, new capabilities to master 1-on-1's, and an arsenal of insights to take effective action.

A no-details-missed **worksheet** for analyzing employee experience solutions

Use this worksheet to pencil in your thoughts, questions, and concerns as you go through your buying journey. Start with your assessment and move through the worksheets until you can determine your ROI.

ASSESSMENT

Current business challenges and pain points

Take note of your challenges and pain points here. An example would be listing the need to drive retention, the need for better measurement, the need to drive action, and the need to deliver insights.

Change management challenges

Take note of your change management needs here. An example would be getting managers' input, answering concerns, gaining team consensus, and leadership buy-in.

Current state of employee experience measurement

Take note of your current needs here. An example would be listing the pros and cons of your current program/ stage of sophistication, such as:

- We accomplish longer surveys one to two times a year
- Survey reporting takes X amount of hours of work time – our NPS surveys are dropping in participation rates.

Values and culture

Take note of your values and culture that tie into people analytics needs here. An example might be:

- We put employees first.
- We value open and honest conversations.
- We are forward-thinking innovators.

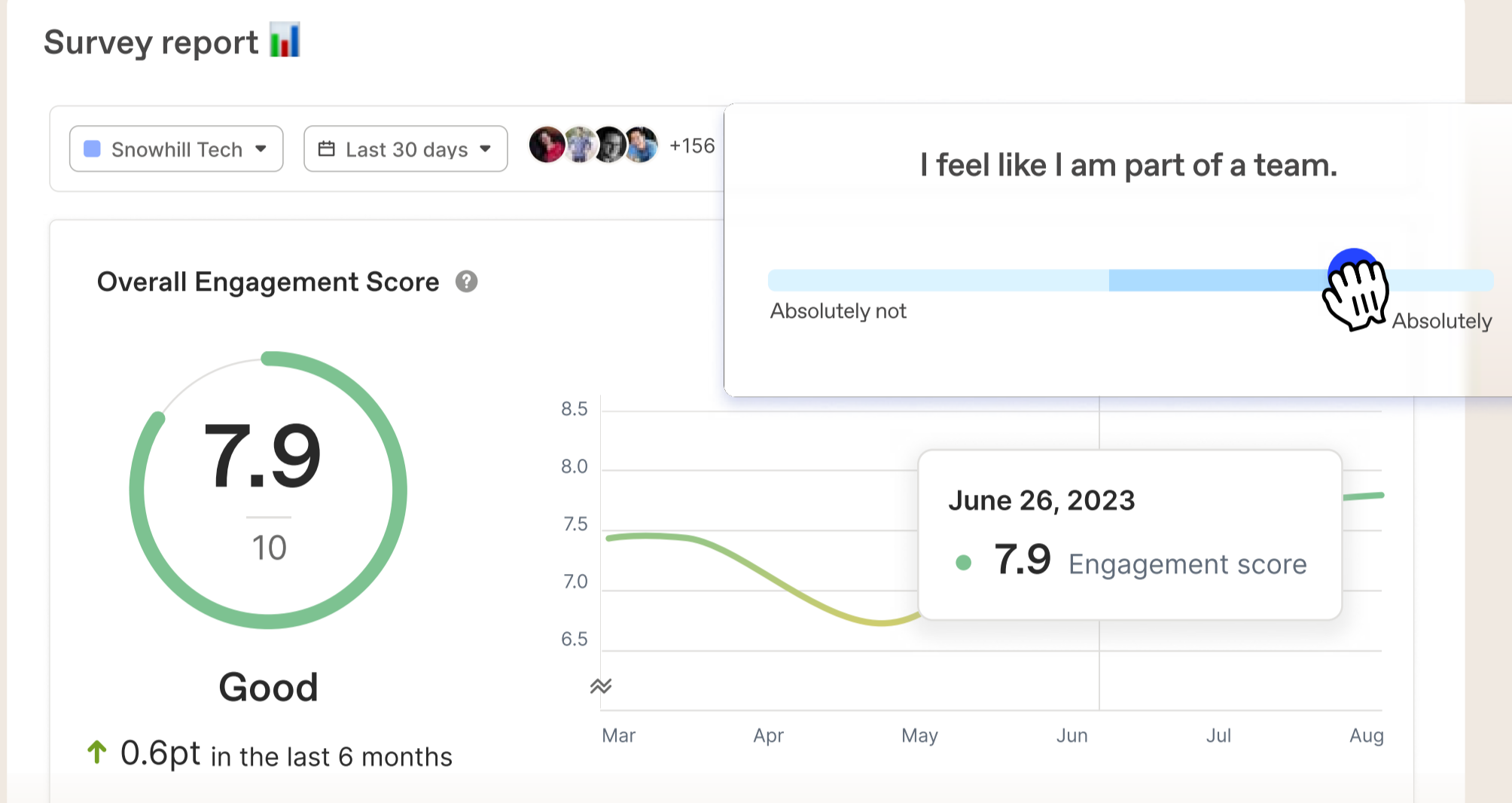
Levels of governance, autonomy, and visibility

Reflect on the roles of everyone in the employee experience and how it translates in an EX platform. An example might be:

- Does everyone have access to survey reports and results?
- Can employees at our company message leadership whenever they want?
- Can team leaders and members book 1-on-1 meetings with each other?
- Can team leaders at our company survey their teams directly?
- Do employees have team dashboards to view a record of their manager's actions to improve their experience?

Our employee experience platform helps you build better and more productive relationships and creates the conditions for great work.

[See how it works](#)



IDENTIFY KEY PEOPLE, TIMELINES, AND BUDGET

Key people

Take note of your key people needs here. An example would be anyone who can veto your initiatives and implementations: CFO, CEO, COO, department managers, and line leaders.

Driving buy-in with stakeholders

Take note of your stakeholders here. As discussed in our section on buy-in, you will need a plan for change management, consensus, and conversation with anyone who can veto your software purchase. You will need to be prepared to answer questions, concerns, and budget issues with data around employee experience. Listing vendors' customer cases here can help drive your initiative.

Stakeholder questions, answers, and key points

Take note of your stakeholder questions, answers, and key points here. When you meet with stakeholders, be prepared to listen actively and note of any questions or concerns you have not addressed. This worksheet is a handy place to do just that.

Realistic timeline

Create a simple timeline here. To start your project off right, you will need to have an idea of the timeline. What are your ideal start and end points regarding purchasing, implementation, and training? List the various stages and include rollout and training times to get an accurate view of when your project will start to see ROI.

Budget notes

Take note of your budget needs here. This is a good place to note budget concerns, limitations, and expected ROI.

IMPLEMENTATION AND SUPPORT

Ask about implementation timelines and support before, during, and after implementation. What are the proposed key implementation steps?

INTEGRATIONS AND API

Be sure to list needed integrations and APIs within your existing tech stack.

VENDOR EVALUATION AND BUSINESS CASE BUILDER

Here is a place to take notes as you evaluate vendors. Will you be comparing only SaaS solutions? Build-it-yourself survey solutions? Solutions that are available as part of your HRMS? Or a mix of all of these?

ROI

Here is a place to take notes on what ROI you want to achieve and how each vendor addresses that ROI. What will a successful implementation and rollout look like?
