qualtrics XM

BEYOND ENGAGEMENT

A simple guide to designing a world-class healthcare employee experience program

Retain top talent, battle burnout, and enable empathy at scale.

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Your employees have changed.

From the way they work, to what they expect from their managers, everything about the relationship people have with your organization is different.

Of course, the employer-employee relationship is always evolving. But global events, including the COVID-19 pandemic, racial justice issues, political divisions, as well as climate and weather events, have rapidly reshaped people's outlook on their jobs, their lives, and their priorities.

While patient care remains a top priority, employee expectations have evolved when it comes to employer flexibility, work-life balance, well-being and workplace safety.

Employees are renegotiating the terms of their relationship with work and want their high expectations met or even exceeded – or they'll leave.

Where does an employee experience management program fit into all of this change? For starters, a modern listening program will clue you in to your employees' shifting priorities – and not only highlight what needs to happen in order to meet employee expectations, but offer you the insights you need to design and improve the employee experience to put your people first.

But, we already track employee engagement, you say. Maybe you do. But, motivated, hard-working employees who find meaning in their work (read: engaged!) can still:

+ Be at risk of burnout

+ Feel excluded from their teams

+ Get bogged down by clunky technology and processes

+ Leave your organization to escape the above

Because of all these shifts with your people and what they want from work, it's time to rip up your existing employee experience playbook. Organizations clinging to the old ways will be left behind in this next era.
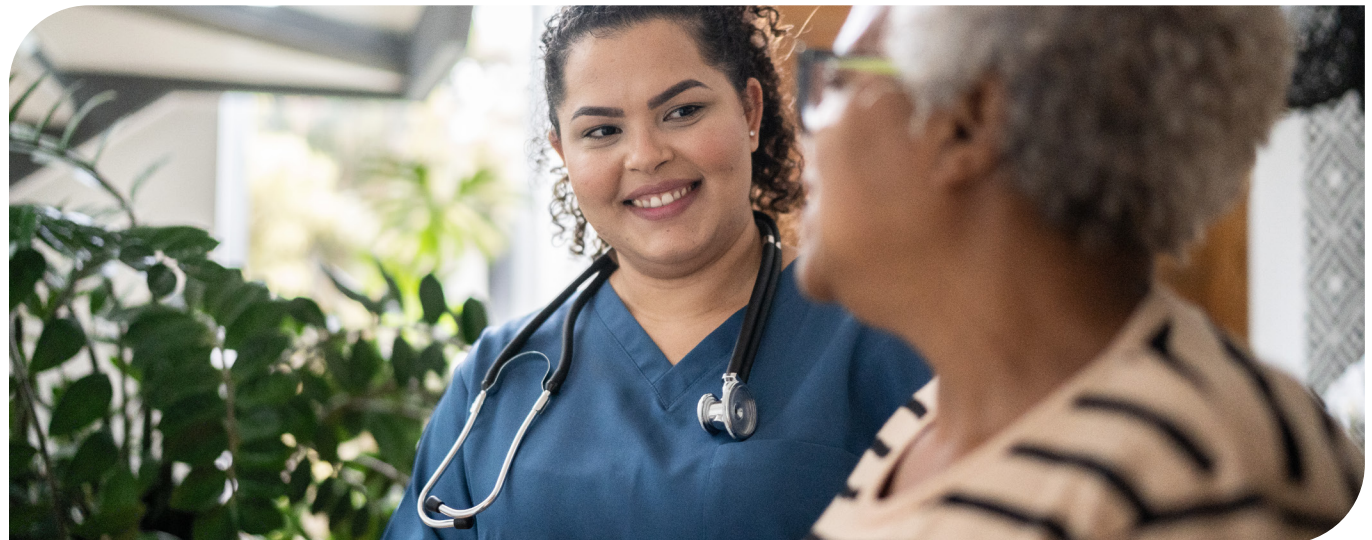
How you measure success in your employee experience must change. And our new EX25 methodology and insights provides the framework for building a successful organization going forward. Not just for happy employees. Not just for retention. Not just for creating a great patient experience. Not just for meeting organizational outcomes. But for all of the above, holistically.

The next era of success starts with employee experience. Let's get started writing your new playbook – together.

Written by the Qualtrics Employee Experience Product Science team

We're a group of organizational psychologists with decades of experience measuring and improving employee attitudes towards work. We cover a range of disciplines, from Employee Engagement to Employee Assessment. We bring a mix of consulting and academic backgrounds, meaning we understand the importance of academic rigor combined with a practical "real-world" approach. Along with the EX25, we have designed Qualtrics methodologies on Well-being, Diversity & Inclusion, Candidate Experience, and 360 competency feedback.

Laying the foundation

Laying the foundation

Travel (briefly) back in time with us.

In the 1970s, employee satisfaction was the go-to metric for understanding your people. At that time, organizations asked employees about things like schedule, compensation, and benefits to determine their satisfaction at work.

But organizations soon realized satisfaction wasn't an adequate measure of whether employees were adding value to the business in terms of productivity, problem-solving, or innovation. Thus, the idea of employee engagement became the new standard.

Fast forward to today, and what we know about employee engagement is also ripe for disruption. Why? Because, as a metric, it doesn't give organizations the full picture of experiences employees are having at work on a day-to-day basis. And organizations need that full picture – or what we call the employee experience (EX) – in order to drive better results at the top and bottom lines.

WHY MUST ORGANIZATIONS GO BEYOND ENGAGEMENT?

This shift from old-school employee engagement to a more holistic approach to employee experience has been driven by a number of factors, including:

+ **Organizations are changing faster than ever** especially since the onset of COVID-19. Add to that digitization, disruption, remote and hybrid work, and other economic forces – all factors that are causing organizations to shrink and expand at a more rapid pace. Meaning there's a need to really understand the impact on people more regularly than once a year.

+ **The increasing importance of measuring outcomes beyond engagement.** Organizations – and HR teams in particular – are racing to understand the full picture of EX since critical key performance indicators (KPIs) like employee well-being and inclusion have leveled up to the C-suite and board agendas. But organizations need to do this without adding more surveys. Instead, they need to listen smarter and design programs that do more with less.

+ **The war for talent is fiercer than ever before** and experiences are one of the last ways to differentiate yourself as an employer of choice.

" *Many EX models have been in place for decades. But the world of work today looks very different than it did just a few years ago. Our validated EX25 model takes the changing nature of work and employee expectations into account."*

Matt Evans
Senior EX Product Scientist, Qualtrics

By focusing on employee behaviors and improving the employee experience, the world's leading organizations have discovered that there are knock-on effects: not just to traditional HR metrics like turnover and absentee rates, but also on patient experience and overall profitability.

And while engagement is indeed a foundational construct within employee experience management, traditional engagement surveys (when used in isolation) are not sufficient to measure the entire employee experience.

Focusing more broadly on the employee experience allows organizations to gather data not only about engagement and its drivers, but about the entire employee lifecycle. Crucially, this approach puts a heavier emphasis on the perspectives and experiences of the employees themselves.

Indeed, there are important touchpoints that happen throughout every employee's journey: the first day, the performance review, ongoing training, getting promoted, and so on.

These are all moments that matter at work – and all moments that should be measured in order to improve the employee experience.

WHO WILL TAKE YOUR EX PROGRAM TO THE NEXT LEVEL?

Of course, all of this requires buy-in – and courage! – from everyone in an organization:

+ **Executives & Leaders** must have the courage to embrace candid feedback and learn to accept (and act on) the bad along with the good.

+ **HR teams** must have both courage and impetus to design feedback programs to identify, measure, and understand experiences employees are having and make changes to their HR processes based on that feedback.

+ **Employees** must have the courage to be honest with their feedback and trust there will be no reprisal from providing honest feedback.

In the next chapter, we'll explore the constructs best-in-class HR teams are using to rebuild their employee experience to attract and retain talent (and how you can, too).

EX25: KPIs and drivers of the employee experience

EX25: KPIs and drivers of the employee experience

Now that we've covered why organizations must go beyond engagement, and who is responsible for taking your EX program to the next level, let's look at how you'll get to the next iteration of your program.

With our newest EX25 methodology, and its foundational components – 6 KPIs and 25 EX drivers – organizations can not only mature their EX programs, but better measure and take more meaningful action on employee feedback.

This set of KPIs simplifies the engagement metric and adds new measurements on inclusion and well-being. Our in-house team of organizational psychologists also identified the 25 most impactful drivers for these KPIs, which include trust, safety, respect, and work-life balance.

With EX25, organizations can holistically understand employee experience and where to focus to drive impact, without adding more complexity to their employee-listening program.

> *Before our partnership with Qualtrics, we had a fairly immature listening strategy. We needed the ability to measure all of those experiences that matter, from candidate experience all the way through exit interviews.*

Karly Cope
VP of Talent Management at Community Health Network

WHAT ARE THE EX KPIS?

EX KPIs are the outcome measures that indicate how your organization is doing across key aspects of the employee experience.

Those 6 KPIs are:

01 Engagement

Employee engagement is strongly linked to organizational outcomes, such as performance, customer satisfaction, retention, and innovation.

In this KPI, you will measure employees':

+ Likelihood to recommend your organization

+ Willingness to go above and beyond

+ Sense of accomplishment at work

02 Intent to stay

Once part of engagement, intent to stay will measure how long your employees intend to stay at your organization.

03 Experience vs. expectations

In this KPI, you will ask employees to indicate to what extent their expectations are met at work.

Answers will provide a unique perspective, reflective of employees' individual expectations. Once you've collected listening data, you can easily segment results to differentiate the experiences of employees based on whether the organization is exceeding, meeting, or falling short of expectations.

> "To accelerate progress and truly embed diversity, equity, inclusion, and belonging into the culture and operating rhythm of a company, make sure it's measurable and actionable so you can hold leaders to account and meet the commitments made to your people."

Farren Roper
Head of Diversity, Equity and Inclusion, Qualtrics

04 Inclusion

Inclusion has quickly become a key differentiator between a positive working culture and a negative one. Inclusive organizations are more innovative, productive, and have higher retention.

In this KPI, you will assess:

+ Belonging

+ Authenticity

+ Equity

05 Well-being

This important measure is becoming more critical as the lines between work and home increasingly blur. Employers must create working environments conducive to well-being, so that employees are not at risk of burnout, presenteeism, and/or low productivity.

In this KPI, you will measure employees':

+ Energy

+ Positivity

+ Relationships

06 **Burnout**

Burnout in healthcare workers is a significant concern and can negatively impact employee well-being. It is associated with poor mental health outcomes for healthcare workers in addition to contributing to suboptimal care for patients.
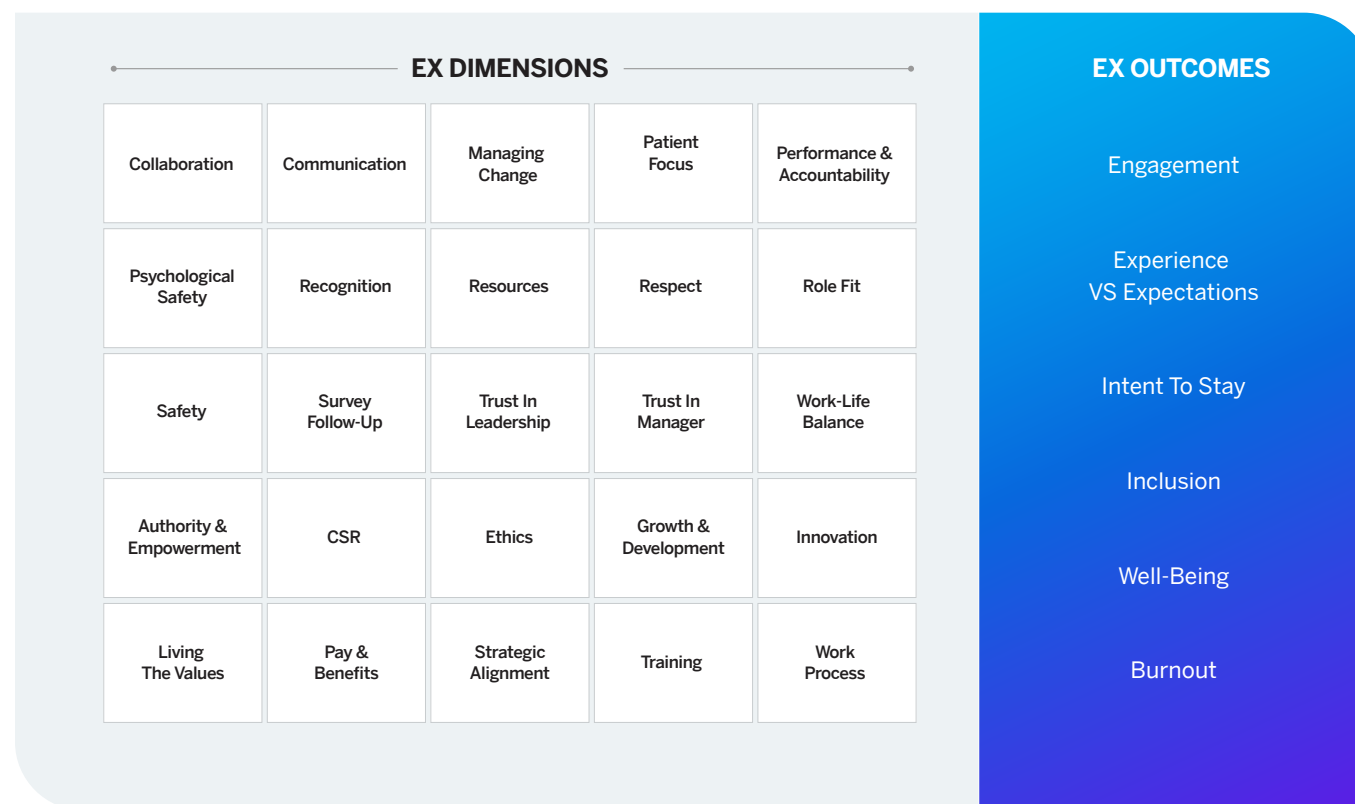
In this KPI, you will measure employees' perceived stress to gain actionable insights into the drivers of burnout in your organization.

WHAT ARE THE EX DRIVERS?

EX drivers are the aspects of the employee experience that influence the KPIs. Understanding each driver provides your organization with critical signals for where to start when it comes to improving your employee experience.

There are 25 EX drivers:

EX DIMENSIONS					EX OUTCOMES
Collaboration	Communication	Managing Change	Patient Focus	Performance & Accountability	Engagement
Psychological Safety	Recognition	Resources	Respect	Role Fit	Experience VS Expectations
Safety	Survey Follow-Up	Trust In Leadership	Trust In Manager	Work-Life Balance	Intent To Stay
Authority & Empowerment	CSR	Ethics	Growth & Development	Innovation	Inclusion
Living The Values	Pay & Benefits	Strategic Alignment	Training	Work Process	Well-Being
					Burnout

> **For both nurses and physicians, the ability to meet career goals (growth & development) and belief in the future of the organization (strategic alignment) were top experience drivers.**

Qualtrics EX25 for Healthcare

01 Authority & Empowerment

Employees who feel they have autonomy over their work are more likely to want to stay at the organization longer and be more engaged.

02 Collaboration

Work that is collaborative has been shown to lead to better employee attitudes, and collaboration itself is becoming increasingly important as work units become more cross-functional and sources of social connection.

03 Communication

Feeling that there is open communication is an important precursor to building trustful relationships in an organization, trust being a foundational aspect to a healthy working relationship.

04 Corporate Social Responsibility (CSR)

Corporate social responsibility is now a key driver of employee perception of their employers. Most employees want to work for organizations that promote social causes and use their power and money to give back.

05 Patient Focus

Fostering a sense of pride in providing a high level of patient care can increase employees' sense of satisfaction and commitment to the organization.

06 Ethics

Integrity is often a core part of organizational purpose. Employees prefer to work for a organization that stands for the right things in terms of how they do business.

07 Growth & Development

Growth is a fundamental human need beyond the workplace, and employees generally want to feel a sense of growth in their role and that their work is offering something to them.

08 Innovation

Being able to adapt, innovate, and create new ways of doing things or products and services is long seen as a critical aspect of a healthy organization, and one which many organizations want to foster.

09 Living the Values

While most organizations have a set of values, these values are much easier to create and promote than live by, which has led to the need to measure how much they are being role modeled and experienced through the organization.

10 Managing Change

Being able to adapt to new patient needs, new competitors, or other external changes is fundamental to agility, and being able to help employees work through changes is critical to their attitudes at work.

11 Pay & Benefits

Reward is a hygiene factor for employees to feel that their skills are valued and appreciated. If employees are able to get significantly better pay and benefits elsewhere, it's more likely they'll explore moving on after a few bad weeks or months at work.

12 Performance & Accountability

Clear performance expectations and accountability is key to providing a fair deal for employees and increasing performance.

13 Psychological Safety

With the rise of the inclusion agenda, organizations are realizing that providing environments where employees feel safe to speak up is healthy to inclusion, as well as engagement and a feeling of connectedness.

14 Recognition

Recognition is a core part of the employees' contract with an organization and feeling unseen or unrecognized will inevitably lead to a reciprocal lack of commitment from employees.

15 Resources

When organizations do not provide adequate resources to enable employees to be successful, this will ultimately lead to frustration and departure, a phenomenon most often seen with high performers.

16 Respect

Respect is the baseline and foundation of a healthy culture, and most organizations have expectations around respectful treatment in their employee handbook or code of conduct. Without feeling respected, there is little to build on.

> *Organizations should focus on making sure employees are well-aligned to the responsibilities of their roles, as well as feel connected to the organization overall. It is the responsibility of managers and leaders to ensure employees are not overloaded with tasks that they are unable to finish within the scope of work."*

Laura Harding
EX Product Scientist, Qualtrics

17 Role Fit

An employee can love the company culture or their working location, but if they don't find that their role is interesting or a fit for their skills, they are unlikely to want to stay long term.

18 Safety

Unlike other EX constructs, employee safety is a "100% item" – meaning that organizations should strive to close even the smallest gaps in employees' experience, particularly in the post-pandemic workplace.

19 Strategic Alignment

When employees understand the broader direction of the company and how their role fits into that direction, employees feel like their work is more significant; therefore, providing this connection to all roles is a must.

20 Survey Follow-Up

Listening to and acting on feedback builds trust, and so any survey should include an item to measure the confidence employees have that their feedback will drive action. Our research shows that this item is an important precursor to engagement and well-being.

21 Training

Employees rightfully expect that the time is taken to train them on the specific aspects of their roles that are essential to success; thorough, relevant training is an opportunity for organizations to demonstrate their willingness to invest in their people.

22 Trust in Leadership

Trust is a fundamental basis for any relationship. While many employees won't have personal relationships with senior leaders, it's important that they trust them to make the right decisions for the organization.
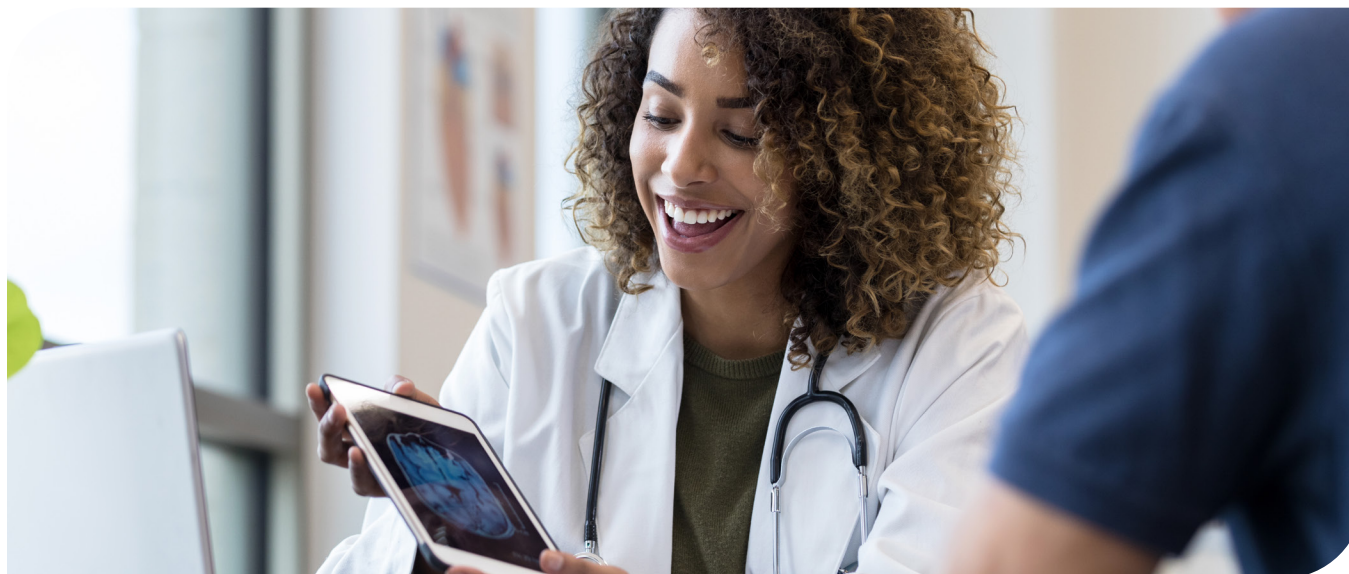
23 **Trust in Manager**

If an employee trusts their manager, they are less likely to respond negatively to difficult circumstances. Trust also creates transparency, allows employees to be clear about their expectations, and provides the basis for healthy, long-lasting relationships.

24 **Work-Life Balance**

Engaged employees who don't feel they have a good work-life balance are unlikely to see a long-term future with the organization. Work-life balance is increasingly a top consideration in assessing a new role.

25 **Work Process**

Too much process can result in unwanted bureaucracy, but too little results in a lack of structure and ability to scale. Naturally, how employees feel about their work processes influences how they feel about their ability to make progress in their work overall.

WHAT'S THE DIFFERENCE BETWEEN EX KPIS AND DRIVERS?

A useful analogy when understanding the difference between KPIs and drivers is health.

Think of the EX KPIs as being health indicators such as heart rate, BMI, and blood sugar level.

If you want to influence these health indicators, you can't impact them directly. Rather, you have to take action on the things that drive them, e.g., diet and exercise. After a few weeks or months of new habits around diet and exercise, you start to see the health indicators change.

It is the same with EX KPIs and drivers.

If you want to influence EX KPIs (engagement, inclusion, and so on), you can't impact them directly. Rather, you have to take action on the things that drive them (e.g., autonomy, growth & development, etc.). After a few weeks or months of new habits, you start to see the KPIs change.

In the next chapter, we talk about how to get started driving change based on the EX25 model.

Results to aha! moments: How to take action on employee feedback

Results to aha! moments: How to take action on employee feedback

A mature EX program understands that feedback from employees is a critical data point to helping them be more productive and more fulfilled. It doesn't shy away from acknowledging difficult feedback, and understands that time invested in changing behavior and/or policy based on feedback is as critical to business success as time invested in serving customers.

Yet, many organizations don't realize that taking action and changing something as a result of employee feedback is a chance to improve the employee experience in itself.

CREATING CHANGE FROM EMPLOYEE FEEDBACK

Once you start collecting employee feedback, there will be three main activity loops that facilitate real change in your organization:

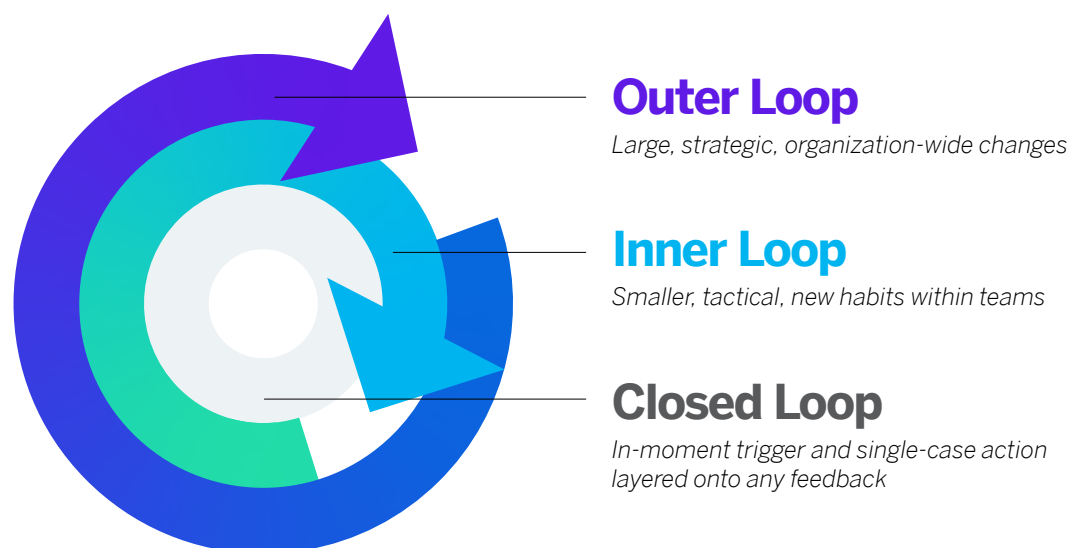**01 Outer loop, e.g., process changes**

These larger, more strategic changes will be implemented throughout the organization, and are likely to be led by senior leaders or HR teams. An example of an outer loop change is introducing a manager-wide training on inclusive leadership.

02 **Inner loop, e.g., new habits**

Smaller, more tactical changes which might be implemented within teams, or between a manager and direct report. They are likely to be led by managers and teams. A good example of an inner loop change is managers making a habit of starting team meetings with recognition.

03 **Closed loop, e.g., in-moment trigger and single-case action**

These changes are layered onto any feedback. They are likely to be led by HR teams, managers, and employees. Scheduling a one-on-one meeting with a manager to discuss a provided suggestion is a prime example of a closed loop change.

Outer Loop
Large, strategic, organization-wide changes

Inner Loop
Smaller, tactical, new habits within teams

Closed Loop
In-moment trigger and single-case action layered onto any feedback

4 STEPS FOR TAKING ACTION ON FEEDBACK

In order to see behavior change from results, we recommend a four-step process:

01 Listen

In this step, you will open the quarterly pulse or annual baseline for feedback from your employees.

02 Assess

Set aside time to review results, consider them in the context of recent team events, and experience any potential reactions (e.g., frustration, fear, disappointment).

03 Huddle

Getting the team's perspective is an important step between assessing feedback and acting on it. The discussion should take place in two stages: the first to discuss the results, and the second to suggest and agree on new ways of working.

04 Act

Ultimately, the whole point of asking for feedback is to act on it! Asking for feedback and not acting on it can be more harmful than not asking for feedback at all. Over the weeks and months, the team should try out the new ways of working, find what works and what doesn't, and reflect on this in the next quarter's results huddle.

We recommend that you perform this four-step process on a quarterly basis. First, with an annual baseline survey that is slightly longer and allows leadership teams, HR, and managers to get a robust, cross-sectional view of their organizations and what drives positive employee experiences. All 25 EX drivers should be covered, as well as the KPIs.

To supplement the annual baseline, we also recommend three shorter quarterly pulses. These should provide a regular measure of the quarterly signals, meaning organizations can stay on top of the most critical drivers of the employee experience.

This approach allows you to not only listen more frequently, and in turn, have a better pulse on your workforce. Our technology also allows you to do this in an agile way – by rotating signals in and out of the larger listening program (and not re-doing a laborious engagement survey four times per year, for example).

> "We encourage managers to think about quick wins, evolving working habits over time, and using the results to drive ongoing conversations about the employee experience. In this way, action planning/taking becomes less of a burden than it is today and more embedded in the way that people actually work."

Matt Evans
Senior EX Product Scientist, Qualtrics

Listen
Open quarterly pulse or annual baseline for feedback

Act
Adopt new habits & continue what's working

A realistic operating cadence for feedback

Assess
Review latest results

Huddle
Discuss results & co-create new working habits

TIPS FOR DISCUSSING RESULTS AND AGREEING ON ACTIONS

Whether discussing results with a manager, direct reports, or peers, it can be difficult, especially if the experience isn't as positive as the team would like. Here are some tips for a constructive conversation.

DO	DON'T
Be open: Try not to pitch results as better or worse than they are.	**Debate who's right or wrong:** When it comes to employee sentiment perception is often reality.
Be clear: Avoid jargon, and be as concise as possible.	**Take large decreases personally:** Discussions should avoid focusing on minor shifts from previous touchpoints, but pinpoint big-ticket items that will make a positive impact.
Respect opinions: Team members should feel safe to share their views.	**Jump to conclusions:** Avoid steering the conversation with your perspective first.
Ask questions: Leave time to reflect and discuss each data point	**Seek to identify individual responses**.... ever!
Be objective: This is about identifying opportunities to enhance the employee experience.	

Evolving your EX program will enable your organization to systematically use insights to identify and improve experiences across the talent lifecycle, as well as continuously learn, share insights, and rapidly adapt to the needs and expectations of all employees.

With a mature and modern program, your organization will also more readily and rapidly adapt to shifts in the healthcare industry, enabling you to design and improve experiences that support happy employees and retention, create a great customer experience, and meet business outcomes – all in one holistic program.

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TAKE YOUR EX TO THE NEXT LEVEL

Get started designing and improving
experiences that put your people first.

LET'S GET STARTED