

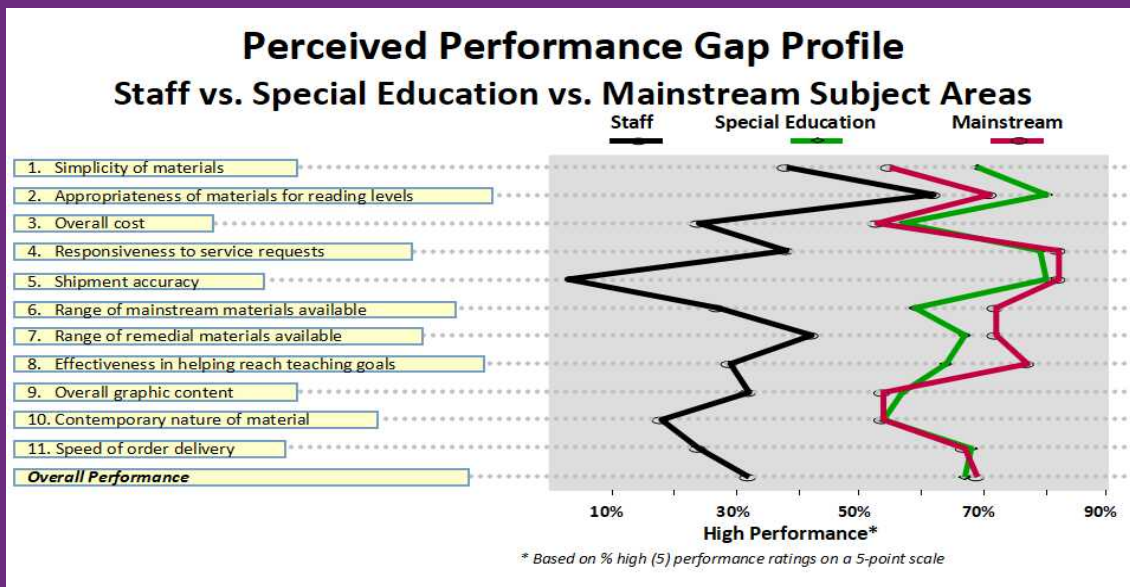
Employee Personas And Their Linkage To Customer Behavior: What Every Company Should Know About Personas, And How To Generate And Leverage Them

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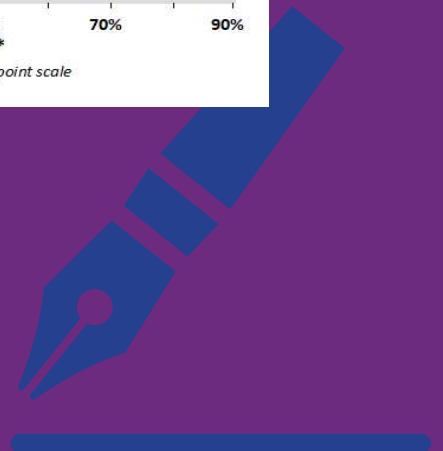
Many Companies Routinely Develop Customer Personas. Why Do They Also Need Employee Personas?

For some time, it has been readily accepted that developing and leveraging personas, particularly as related to marketplace behavior, are essential to understanding Jobs To Be Done (JTBD) in customer experience. Marketers have successfully utilized the mindsets and emotions which occur in the customer's journey and relationship with a supplier to build personas and categorically track and evaluate each touchpoint element. But what about generating and applying personas for the other stakeholder group so essential to optimizing customer experience, the employees?

In human-centric terms, and just as with customers in CX, it has become increasingly important to understand EX, or employee experience. Because of the well-proven linkage between employee experience and customer experience and the fact that employee perceptions of key value delivery elements often don't align with those of customers (see below), this has emerged as a pivotal subject for every enterprise.



And, within EX, it is essential to identify JTBD elements and the drivers of positivism, performance barriers and pain points which shape employee behavior.



Over the past few years, HR has turned to developing employee personas – valuable as a lifecycle management tool, from recruitment and onboarding through performance and training, and exit or retirement – in both designing and sustaining EX. Why the greatly increased focus? There are several reasons:

- Employee engagement levels, studied by many consulting organizations, has been declining for a considerable period of time. One study showed that 51% of the workforce is currently not engaged, directly impacting alignment and productivity.
- Studies have indicated that over 10% of employees (12% per SHRM in 2016) leave their jobs each year, a percentage that is also increasing.
- Millennials, in particular, show little employer loyalty. A Deloitte study found that almost half (44%) would leave their company if given a choice.

Employee personas share common characteristics with customer personas. Namely, for HR, the employee persona is a representative (though fictional), multi-dimensional description of how an employee behaves on the job. In short, a persona is a vision of the ideal employee contributor and ambassador.

Forming personas is both an art and a science, requiring approaches which transcend much of the traditional thinking about employee behavior. Beyond the fit, alignment and productivity embedded in decades-old definitions of engagement, today employees are searching for meaning in their work. Meaning can be found in the insights which aid in formation of personas. In CX and EX, that meaning often comes through enterprise-wide commitment to the brand promise, the enterprise and fellow employees, and the customer. Employee persona generation can help meet both EX and CX design goals.



The Rationale For Developing Outcome-Based Employee Personas

Like customers, it is desirable to look at employees on an individual basis rather than as a whole, at a 20,000 foot workforce level. This is a very human way of addressing the employee experience – giving each person a name, role, and personality and getting a better sense of life ‘on the job’, with an emphasis on how their thinking and behavior impacts CX delivery.

Employee experience is core to persona identification. Positive, happy employees actively contribute to positive customer behavior (and negative employees contribute to negative customer behavior). As a general statement, this idea is both well-known and well-accepted. Engagement research has endeavored to identify key elements of employee effectiveness with and for the enterprise; however, there is little proven intentional connection or integration between customer experience initiatives and desired employee behavior.

The real issue: How can organizations build on the foundation of employee satisfaction and engagement research to help drive enterprise stakeholder-centricity and a higher level of employee commitment? There are many ways to bring all of these individual, rarely conjoined functions and capabilities into unison, so that they are more effective on behalf of both the customer and the employee. Perhaps the simplest, and arguably the most sustainable and strategically differentiated, is to have employees directly, actively involved in, and contributing to, making this happen. OK, this – what we call employee ambassadorship - is clearly a worthwhile goal, with a key and immediate question: How can organizations make this a reality?

A culture of customer focus and ‘wow’ value delivery, with emphasis on conjoining the customer and employee experience, often begins (but doesn’t end) with employee job satisfaction.....

The history of companies measuring employee job satisfaction, and endeavoring to link employee perceptions with customer behavior goes back almost 100 years. Organizational surveys began during the 1920’s and 1930’s, a result of emphasis on industrial engineering and time-and-motion studies which began at the dawn of the 20th century. By the 1960’s and 1970’s, many companies were conducting employee attitude and satisfaction studies; and these studies were further refined during the 1980’s and early 1990’s, focused as much on achieving quality as on creating satisfied employees.

....and is enhanced through employee alignment with the company’s mission and brand promise....



In the mid-1990's, more progressive companies had moved on to employee engagement research. This was a significant step for human resources professionals. It was a recognition that companies needed to view employees not only as a resource but as partners in helping reach overall business goals. The principal intents of employee engagement, then, have been to identify:

- what originally drew individuals to the company,
- what keeps them there,
- how productive they are against goals
- what they see as their role and how involved they are in it, and
- how aligned they are with the company's goals and culture.

Brand engagement is an extension of employee engagement. Much of brand engagement is managed through the marketing structure, and it involves the communication of company values, and product and service benefits, to current and potential customers, and to other stakeholders. Some companies have recognized that, to deliver the brand promise externally, employees represent the biggest opportunity to arrive at that destination. Involving employees more directly in brand-building has definite advantages for HR, such as attracting and retaining good employees, and creating a stronger understanding of the company's mission and vision, which then combine to build a more cohesive and aligned work force. This is where EX persona development should begin; but there is more.

Employees, whether they are customer-facing or not, need to 'live' the brand and company value promise as company representatives. Concepts and programs such as employee engagement and brand engagement (through employees), though considerably more progressive than satisfaction, can be less than sufficient to help companies optimize the customer experience or sustain top-level customer value delivery. Employees may believe they are doing valuable things for their company and/or they may have positive feelings about their jobs, their employers, and the brands they represent; but, where is the specificity around building the best customer experience and relationships? Again, our thesis is that this is where EX persona generation and design development should be targeted.

There is a strong and well-documented link between employee experience and customer experience. Can companies, through targeted qualitative and quantitative employee research, learn how to generate prioritize initiatives which will generate optimum staff commitment to the company, to the brand value promise, and to the customers?



If employee satisfaction and employee engagement aren't specifically designed to meet this critical objective, and only tangentially correlate with customer behavior, can a single technique provide the means to do that? The answer to both questions is: Yes, through employee persona and ambassadorship research. Employee ambassadorship has been specifically designed to both build on employee satisfaction and engagement and bring the customer into the equation, linking employee attitudes and actions to customer loyalty behavior.

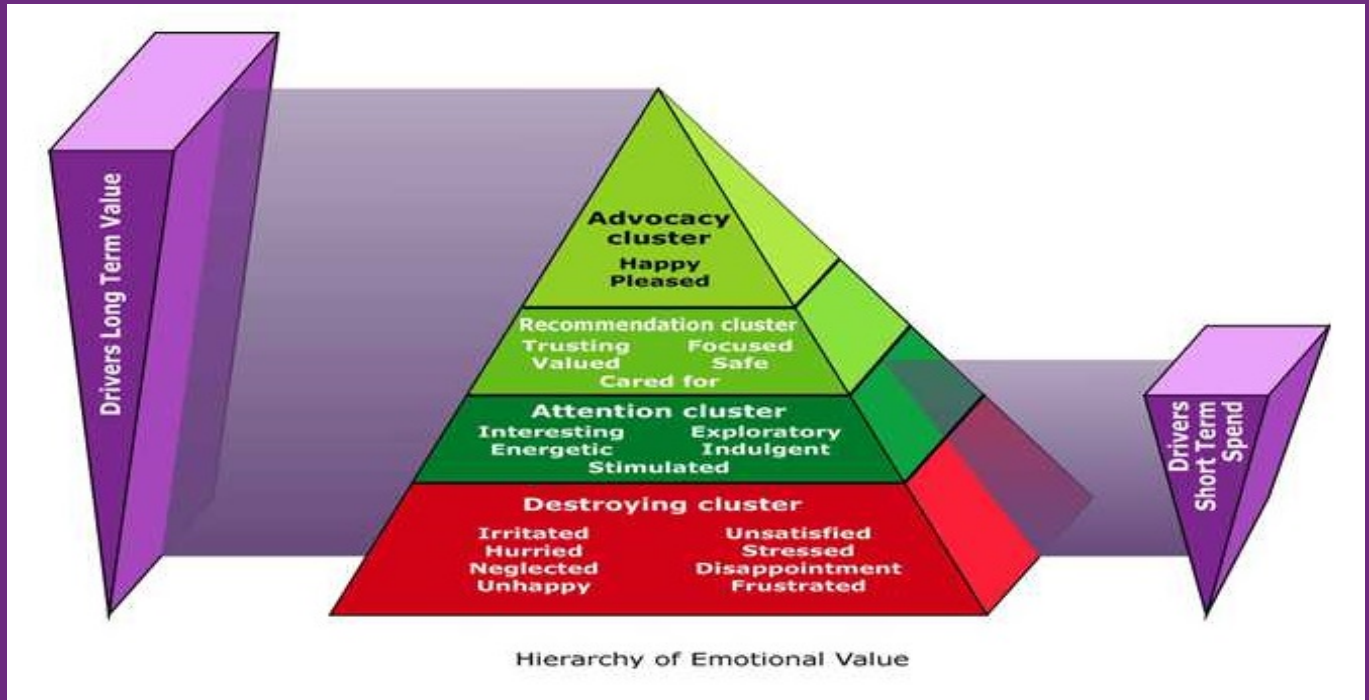
Employee ambassadorship, or employee brand ambassadorship, has direct connections to – yet is distinctive from – both employee satisfaction and employee engagement. As a research framework, its overarching objective is to identify the most active and positive (and inactive and negative) level of employee commitment to the company's product and service value promise, to the company itself, and to optimizing the customer experience.



Ambassadorship is built on a foundation of employee experience design, and recognition that, like customers, employee behavior is driven by both positive and negative emotions:

- Our qualitative employee research protocol features an array of techniques specifically applied to generate personas.
- Our quantitative protocol utilizes a hierarchical model of emotional value, developed through the University of London in 2003 and now applied in multiple industries with over 75,000 respondents around the world:





The result of EX design optimization should be more value for the employee and the enterprise. In fact, consulting organizations like Deloitte have found that HR departments providing the most employee value were five times more likely to be doing EX design thinking. Further, this approach to employee value has received strong executive support: In analyzing human capital development trends, Deloitte has found that close to 80% of executives consider this an important or very important issue.



Through Qualitative Research, Generating and Applying Employee Personas

At Beyond Philosophy, we are able to leverage our extensive international CX and EX consulting, research, and training background, also serving as skilled investigators into identifying what employees really mean as they participate in guided discussions or answer questions on the kinds of persona-related subjects identified .

Unstructured data, from an every-growing landscape of sources, forms the core of employee content analyzed to help design personas. However, it is carefully designed quantitative insight research which offers the most comprehensive depth and opportunity for discovery. The array of qualitative techniques we employ for B2B and B2C clients include:

- Focus Groups
- IDI's (Individual Depth Interviews)
- Mini-Groups
- Online and In-Person Forums
- Ideation and Synectics Sessions
- Ethnographic/Observational Approaches
- (OBB's) Online Bulletin Boards
- Online Community Dialogue
- Chat/email Transcripts, Phone Transcripts, Customer Diaries
- Executive and Employee (EX) Interviews
- Customer Experience (CX) Interviews



The formation of employee personas typically utilizes one, or more, of the qualitative approaches identified. Among the subjects and questions we cover:

- Past and current roles
- Perceived role in customer experience and customer value delivery
- Near-term and long-term career goals
- Likes and dislikes about current job (including training, reward, recognition, opportunities for advancement, etc.), culture, management
- Methods of networking and communication, offline and online – inside and outside of the company.

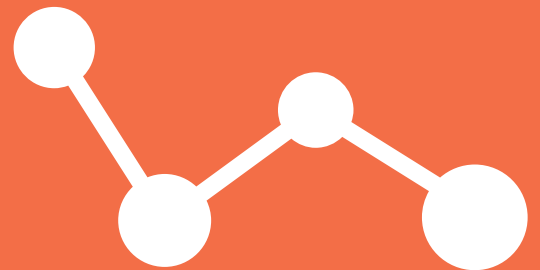
We convert these qualitatively-generated, landscape-type employee experience insights into personas by looking at common emotional and functional themes, employee by employee. In turn, these personas help shape both employee and customer value.

Employee experience is a core driver of company culture, especially as regards customer value delivery. As stated earlier, employees seek meaning and value in their work; and this can be created and sustained through commitment to the brand, product or service proposition, to the enterprise itself, to fellow employees, and, perhaps most importantly, to the customer. Stakeholder-centric cultures are reflected by committed employees, and these employees want and deserve excellent experiences. Persona development and leverage is essential to reaching this goal.



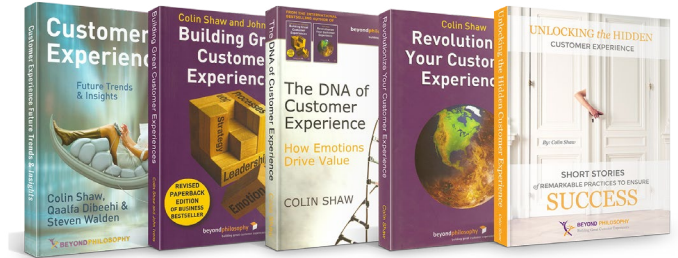
Resources and References

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- Gallup [State of the American Workforce](#)
- Globoforce WorkHuman Research Institute- Deloitte [2016 Global Human Capital Trends](#)
- [Harvard Business Review](#), March, 2009, "The Best Way To Understand You"



About Beyond Philosophy

Beyond Philosophy are literally the world's first dedicated Customer Experience company. Founded in 2002 by our CEO, Colin Shaw, we have built an excellent reputation of being Thought Leaders in Customer Experience.



This is not what we say, it's what others say. We are proud that Colin Shaw our CEO, has been recognized by LinkedIn as being one of the world's top 150 Business Influencers and by Brand Quarterly as one of the 'Top 50 Marketing Thought leaders over 50' and written 5 books on Customer Experience.

Beyond Philosophy help organizations move to the next level of the customer experience. There are many case studies that highlight our work. One of our clients Maersk Line, improved their net promoter score by 40 points in 30 months and then had a 10% rise in shipping volumes as a result of our work.

Beyond Philosophy provide three services.

Consultancy services – both strategic and tactical so we can help guide you to improve your customer experience.

Training services – we can train your CX team on how to improve your customer experience as well as your front line team with our memory maker training.

Specialized research services – we provide some innovative research techniques that discover what drives and destroys value for your organization.

If you'd like further information please contact Beyond Philosophy LLC on our website Beyondphilosophy.com.

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