



Crafting Excellence in HR

Elevating Employee Experience to
Forge a Superior Benefits Strategy

Dr. Kimberly Dunwoody, VP of Member Experience



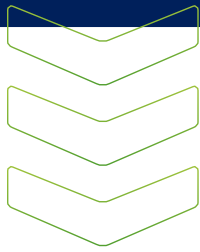
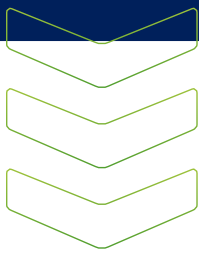


Table of Contents

Foreword & Introduction	3	→
Chapter 1: Creating Your Employee Benefits Experience	12	→
Chapter 2: Uncovering Your Benefits Employee Experience	25	→
Chapter 3: Reaching Your Employee Audience	31	→
Chapter 4: Creating an Effective HR Benefits Communication Strategy	40	→
Chapter 5: Leveraging Your Content via Campaigns	45	→
Chapter 6: Understanding Employee's Needs and Intent	56	→
Chapter 7: Revolutionizing HR: Turning Abby's Benefits Strategy into a Smart Home Ecosystem	62	→
Bringing It All Home	68	→



Foreword

By Tobias Washington, System Director, Digital Employee Experience & Digital HR Transformation for CHRISTUS Health

It's 2024 outside your organization, but what year is it inside your organization? The early 2000s, perhaps—or worse, the 1990s?

When thinking about technology and the transformative era we live in, I apply this lens to our HR organization at CHRISTUS Health. When we compare the seamless digital experiences we enjoy as consumers to what many companies offer internally, some organizations still fall short.

Outdated, cumbersome, and disparate systems can hinder productivity and chip away at employee morale, but the impact extends even further. Consider employee benefits platforms, for example. If employees can't access, use, or understand their benefits it can impact their well-being.

If you provided your employees with the same technology you provide to your customers or infuse within your products, how would that transform your employee experience?

Often, the employee experience becomes secondary to the attention and investment we apply to our external or customer-facing solutions. But the mistake organizations make in deprioritizing the employee experience is that the two are inherently intertwined.

As Kimberly Dunwoody, Businessolver's VP of Member Experience and author of this book, suggests: Your product and customer service experiences are nothing more than outward manifestations of your employee experience. When the employee experience suffers, it negatively impacts culture, innovation, brand reputation, productivity, and profitability.

From the digital transformation I led at CHRISTUS Health, I know firsthand that it can be a complex and formidable endeavor, but disrupting how you do things and applying forward-thinking technologies—along with some creative thinking—pays dividends to your employee experience.

Modernizing Your Employee Experience Starts at Home

Kimberly and I are aligned in our philosophy and approach to transforming the employee experience through innovative techniques and data-driven strategies—and it all starts at home with HR. Our responsibility as stewards of the employee experience is to champion a modern workplace where internal technologies take the burden off employees. This is especially important at CHRISTUS Health where many of our associates are on the front lines serving customers. Incorporating solutions like our AI virtual assistant, Noah, has been a game changer by reducing help tickets and classroom training time while improving communications.

The need for digital transformation hit home for me a few years ago when my Chief Human Resources Officer (CHRO) was trying to submit a request for maternity leave through our company portal. In her frustration, she mentioned that she'd been trying to submit the request all day and couldn't navigate the portal. I responded, "Think of the nurse out on the floor who only has five minutes to figure this out—and you've been trying all day!" This is exactly the problem that organizations must focus on solving. Something that should be so simple propels the user back in time rather than delighting them with a fast, intuitive user experience that helps them get back to meaningful, productive work. Even shuffling paper would have been faster than the complex web my CHRO had to navigate. Today, however, our associates turn to Noah to help them quickly complete these types of requests.

Think Like a Marketer to Drive Employee Engagement

Much like the best practices and framework Kimberly builds upon in this book, we've also designed a process at CHRISTUS Health rooted in a unified strategy that brings all the various disciplines of HR together to execute on common goals. Rather than working in silos, we've developed work streams for delivering a cohesive experience to our employees. Before implementing new tech or solutions, for example, we have teams of associates called "experience activators" that take a field approach to employee listening, bringing feedback back to our teams before implementing new solutions. Not only is this a proactive listening strategy, but it's fundamental to our process and ensures we look beyond implementation to actually deliver a positive employee experience.

After all, it's not enough to simply implement new tech—the technology itself doesn't ensure success. You must consider the delivery of that technology experience.

In the case of an employee benefits strategy, HR professionals must think like marketers and devise campaigns and tactics for elevating benefits awareness while targeting the dynamic and personalized needs of employees.

To succeed, HR must treat employees as customers and tailor communications to resonate with them. This involves using data to segment audiences, crafting targeted messages, and leveraging multiple channels to effectively reach employees. Just as marketers adapt strategies based on engagement metrics, HR should continuously assess and refine their tactics to enhance employee engagement and satisfaction. By thinking like a marketer and meeting employees where they're at in their journey, HR can create personalized experiences that drive awareness, satisfaction, and ultimately support the business case for investment.

From Blueprints to Reality: Transforming Your Employee Experience

It takes time, accountability, and a lot of trial and error to modernize your technology and subsequent employee experience. HR leaders reading this should not be dismayed by two steps forward and one step back, but continually push forward with the support and backing from senior leadership, which is such a critical aspect of HR technology transformation.

Reflecting on the progress we've made at CHRISTUS Health and the relationships we're building with technology partners like Businessolver, I am proud that the business now looks at my team as a core



part of how we strategically scale and optimize the employee and customer experiences. I likewise could not be more excited about the opportunities that lay before HR teams. Opportunities to shape and enhance the employee experience exist like never before. “Transformative” doesn't even capture the essence of the time we're living in. And, while we shoulder a great responsibility as the architects of a modern employee experience, we also have the technology within our grasps to make our vision a reality—starting with one honest question: *What year is it inside your org?*

Introduction

By Dr. Kimberly Dunwoody, VP of Member Experience

In my book “Bridging the Gap,” I explored simplifying complex technologies for everyday users as a key strategy for better interactions with AI. Clear instructions, relatable examples, and user feedback empower users to navigate AI platforms confidently. Enhancing the user-AI relationship relies on shared understanding and open communication, building trust and boosting digital literacy.

This book leverages the mental models in your organization as building blocks by integrating them into your employee experience journey map. Ultimately, your product or service experience reflects your employee experience. Therefore, it's crucial to invest in creating a positive employee experience. Once you have structured these interconnected mental models within your employee experience, you gain a clear, data-driven view that can help address pain points and influence employee behaviors to advance your organizational objectives. This book also explains how adopting a mindset similar to that of a UX designer or marketer can assist in creating personas (mental models about your employees) and craft campaigns to shape their mental models of benefits awareness, understanding (literacy), and utilization. This approach establishes a supportive environment for your employees, fostering mutual trust and collaboration.

Exploring the Social Contract in HR Benefits: Understanding How Insurance Impacts Employee Experience, Risk Management, and Financial Security for Employees and Employers

HR benefits packages are similar to building codes, requiring consideration of local conditions to ensure stability and reassurance amidst life's uncertainties. Just as building codes cater to specific environments, insurance - whether health, dental, vision, accident, or identification - plays a crucial role in nurturing well-being and assurance for individuals and families within the workplace. By aligning with local needs, these benefits uphold a mutual commitment between employers and employees, contributing to risk management and fortifying the social contract within contemporary society. This tailored approach enriches the employee experience, similar to how building codes enhance structural integrity.

While insurance applications vary worldwide, the fundamental goal remains consistent: mitigating risks for both employees and employers.

Developed Nations: Health insurance stands not only as a legal mandate in numerous regions but also as a cornerstone in delivering top-tier healthcare services to employees. Embracing comprehensive medical benefits underscores an employer's dedication to fostering the health and wellbeing of their workforce.

Aging Workforces: Nations with aging employee populations prioritize vision and dental insurances to cater to evolving healthcare needs. By offering these benefits, employers acknowledge the importance of sustaining employee health as they age, promoting overall wellbeing and productivity.

Disaster-Prone Areas: In regions prone to natural disasters or high accident rates, accident insurance acts as a safety net for employees, alleviating financial burdens associated with unforeseen events. Employers providing accident insurance demonstrate a commitment to safeguarding employees during challenging times, nurturing loyalty and resilience.

Identity Protection in the Workplace: In environments susceptible to identity theft risks, identification insurance serves as a shield against potential financial and legal threats. The inclusion of identification insurance in HR benefits underscores an employer's focus on employee security and privacy, reinforcing trust and protecting sensitive information.

Across the globe, beyond the confines of the United States, companies offer a diverse range of benefits to their employees. These benefits reflect the cultural, economic, and legal differences among nations. Some common benefits include:

Health and Wellness Allowance: This benefit typically covers monthly allowances for health and wellness needs, including gym memberships, mental health resources, and other health-related costs.

Paid Time Off (PTO): A universally recognized benefit that encompasses vacation days, holidays, and parental leave.

Flexible Work Arrangements: Widely accepted across the globe, this benefit includes options for remote work and flexible work hours.

Relocation Assistance: For employees moving internationally, companies may cover relocation costs, private healthcare, and international schooling.

Retirement Plans: Similar to the U.S., retirement packages are a standard part of employee benefits globally.



In countries where healthcare is not a mandatory employer-provided benefit, the social contract is often evident. With healthcare typically funded by the government, employers focus on offering benefits like PTO and flexible work arrangements to attract and retain employees. Interestingly, benefit costs outside the U.S. are generally lower, with average costs for private medical, dental, and life insurances below \$1,500 per year per employee. This cost-effectiveness enables a wider range of benefits. Globally, employer-offered benefits are customized to align with local cultural norms, economic conditions, and legal structures, playing a crucial role in strategies for talent acquisition and retention.

Employer-employee relationships in the United States have evolved into a unique social agreement. The complexity of the healthcare system can sometimes cloud this bond. It's more than just work for pay—it shows employers' commitment to their employees' wellbeing. Studying the historical context and current HR trends sheds light on how this social agreement has shaped the modern workplace. This pact's roots date back to World War II when wage freezes prompted employers to offer health insurance to attract and keep talent in a competitive job market. The post-war National Labor Relations Act allowed unions to negotiate benefits along with wages, leading to the growth of employer-sponsored pension plans and health insurance. The Employee Retirement Income Security Act of 1974 set standards for pension and health plans, cementing benefits as crucial components of the employer-employee relationship.

Current Trends in HR Benefits

The landscape of HR benefits is ever-changing, reflecting shifts in societal norms, work dynamics, and employee expectations. Several key trends underscore the importance of HR benefits in the employer-employee relationship:

Enhanced Focus on Mental Health:

Employers are expanding their benefits offerings to include more comprehensive mental health services. This expansion recognizes the crucial role of holistic wellbeing in employees' lives, further demonstrating a commitment to their overall welfare and productivity.

Customized Benefits Packages:

In response to the diverse workforce, companies are providing tailored benefits packages. This approach empowers employees to choose benefits that suit their individual needs, fostering a stronger connection between employer and employee through personalized support.

Embrace of Flexible Working Models:

The embrace of flexible work arrangements and related benefits mirrors the evolving work landscape. These changes indicate employers' acknowledgment of shifting expectations around work-life balance among their employees.

Wellness Initiatives and Preventive Care:

Incorporating wellness programs and preventive healthcare in benefits packages is a strategic move to reduce long-term healthcare costs. It underscores an investment in employees' ongoing health and wellbeing.

Expanded Parental Leave and Family Support:

By extending parental leave and improving family support benefits, employers are adapting to changing social norms and modern family needs. This trend highlights the critical role of HR benefits in responding to societal shifts and shows employers' dedication to supporting employees through various life stages.

All these elements share a common trait - they reflect real-life experiences of your employees. Supporting these areas directly impacts customer experiences. Thoughtfully designing these experiences can yield benefits for both your employees and your business. Let's explore this concept further.

Interdisciplinary HR: Enhancing Employee Experience Through UX and Marketing

In today's rapidly changing corporate environment, Human Resources (HR) departments are increasingly incorporating an interdisciplinary approach to enhance the employee experience. They are integrating principles of User Experience (UX) design and marketing into HR strategies, helping companies create more engaging and satisfying experiences for their employees. This blend not only aids businesses in achieving their benefits goals but also promotes a culture of innovation and openness. Just as there is a social contract between a brand and its customers, leveraging existing skills within your organization can significantly enhance the HR benefits experience, thereby strengthening the social contract with your employees. This promotes a sense of trust and mutual respect.

The UX in HR: Designing for Engagement

The core of UX design is to understand the user's needs and create solutions that are efficient, effective, and satisfying. When applied to HR, UX principles can significantly improve how employees interact with HR platforms and benefits. For instance, designing an intuitive and friendly interface for an internal benefits portal can increase usage rates and employee satisfaction. It makes essential information accessible and comprehensible, thus empowering employees, and reducing frustration and confusion. Silicon Valley giants like Google have long understood the importance of UX in HR. They've created employee experiences that mirror the simplicity and user-friendliness of their consumer products. Everything from their onboarding processes to their internal tools is designed with the employee in mind, ensuring that every touchpoint is engaging and straightforward.

Marketing: Communicating Value Effectively

Similarly, marketing principles can play a crucial role in how HR communicates and promotes benefits to employees. Effective communication strategies can increase awareness and appreciation of the benefits offered, aligning employee perceptions with the company's valuation of those benefits. In addition, branding internal HR initiatives establishes a consistent and captivating narrative that resonates with employees. Companies like Airbnb and Salesforce have excelled in internal branding, ensuring that their HR benefits are not just perks, but integral components of the company culture and employee value proposition.

Success Stories in Interdisciplinary HR Strategies

Google: Leading in UX for HR

Google serves as a prime example of blending UX with HR. The company offers a user-centric benefits portal that simplifies choices and streamlines decision-making processes, ensuring optimal employee experiences right from onboarding.

Salesforce: Delivering a Unified Employee Journey

Salesforce seamlessly integrates marketing principles into its HR benefits, prioritizing clear communication and branding. Their employee portals showcase the company's dedication to fostering a collaborative and engaging work environment.

Slack: Harnessing Product Expertise

Slack's utilization of its product team's UX expertise in internal HR platforms has transformed how employees perceive and utilize benefits. This interdisciplinary strategy has not only enhanced employee experience, but has cultivated a culture of innovation and feedback.

Incorporating UX and marketing principles into HR strategies can significantly enhance the employee experience. Designing HR benefits and communications that prioritize employees can create a more engaging, satisfying, and efficient workplace. Success stories from companies like Google, Airbnb, Salesforce, and Slack showcase the transformative impact of an interdisciplinary approach in HR. In today's competitive landscape, adopting such strategies can be a key differentiator, attracting and retaining top talent through an unparalleled employee experience. Embracing this interdisciplinary approach requires understanding not only of the employee experience, but also focuses on the experience of Abby, the HR Admin.

Navigating the Seasons of HR Benefits with Abby the HR Admin

In the ever-evolving world of HR, time remains crucial. For HR Admin Abby, each moment unveils fresh opportunities and challenges to mold impactful employee experiences. Just as employees' experiences are meticulously crafted, Abby's journey demands equal care. Grasping the seasonal essence of Abby's tasks is pivotal in understanding their influence on the employee experience.



Pre-Enrollment: Laying the Groundwork for Success

Benefit Selection and Adaptation: This period is all about planning. Abby examines the data from the previous year, evaluates new benefit options, and strategizes on tailoring the benefits package to suit the ever-changing needs of her workforce. Staying ahead of industry trends and legislative changes that could influence benefit offerings is part of Abby's role during this time.

Shaping the Employee Experience: For employees, the pre-enrollment season is about learning and engagement. They receive updates about any modifications in benefits options, enabling them to make knowledgeable decisions when enrollment opens. This phase presents an excellent opportunity for HR to design targeted communication strategies that underscore the value of the benefits package and its alignment with employees' wellbeing and career objectives.

Annual Enrollment: Fostering Employee Engagement

Annual Enrollment: This is the pivotal point of Abby's year. All her preparation comes to fruition during this phase. Her primary responsibilities include managing enrollment platforms, assisting employees with their queries and choices, and ensuring a seamless, user-friendly process. Abby's goal is to make every employee feel supported and confident in their selections.

Employee Experience: From the employee's viewpoint, this is the time to act. With Abby's groundwork during pre-enrollment, they are now prepared to navigate the enrollment process effectively. The success of this phase largely hinges on the clarity of the information provided and the simplicity of the enrollment process.

Post-Enrollment: Encouraging Growth

Data Collection & Evaluation: Post the flurry of annual enrollment, Abby transitions into a phase of introspection and analysis. This involves collecting feedback, analyzing participation rates, and assessing the overall effectiveness of the enrollment process. The insights gathered here are vital for making iterative enhancements and shaping future strategies.

Employee Experience: For employees, this post-enrollment period is about reaping the benefits of their decisions and understanding subsequent steps. It's also a chance for them to provide feedback on their experience, aiding in refining future cycles. Post-enrollment communications from HR can guide employees on how to maximize their benefits throughout the year.

By thoroughly understanding Abby's seasonal journey, we can effectively synchronize it with her employees' experiences. This alignment simplifies matters for everyone involved, empowering her team to optimize benefits, achieve Abby's organizational objectives, and strengthen the social bond between Abby and her employees.

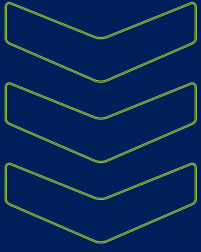
Building a Successful Employee Benefits Strategy

Crafting experience journeys are like drafting the blueprint for a home. Just as every detail counts in creating a harmonious living space, aligning employee experience with customer experience is essential. Similar to how a home's design impacts the daily life of its residents, this concept is crucial not only for employees but also for HR professionals like Abby.

In the ever-changing realm of human resources, each phase presents an opportunity to shape impactful employee experiences, much like each element contributes to a home's essence. For Abby, the HR Admin, her role resembles that of a General Contractor - a continuous cycle of challenges and opportunities. Just as a home necessitates a thoughtful design approach, Abby's role requires the same in crafting meaningful employee experiences. It's not just about setting rules; it's about understanding the employee journey from start to finish and creating touchpoints that enhance their connection with the organization.

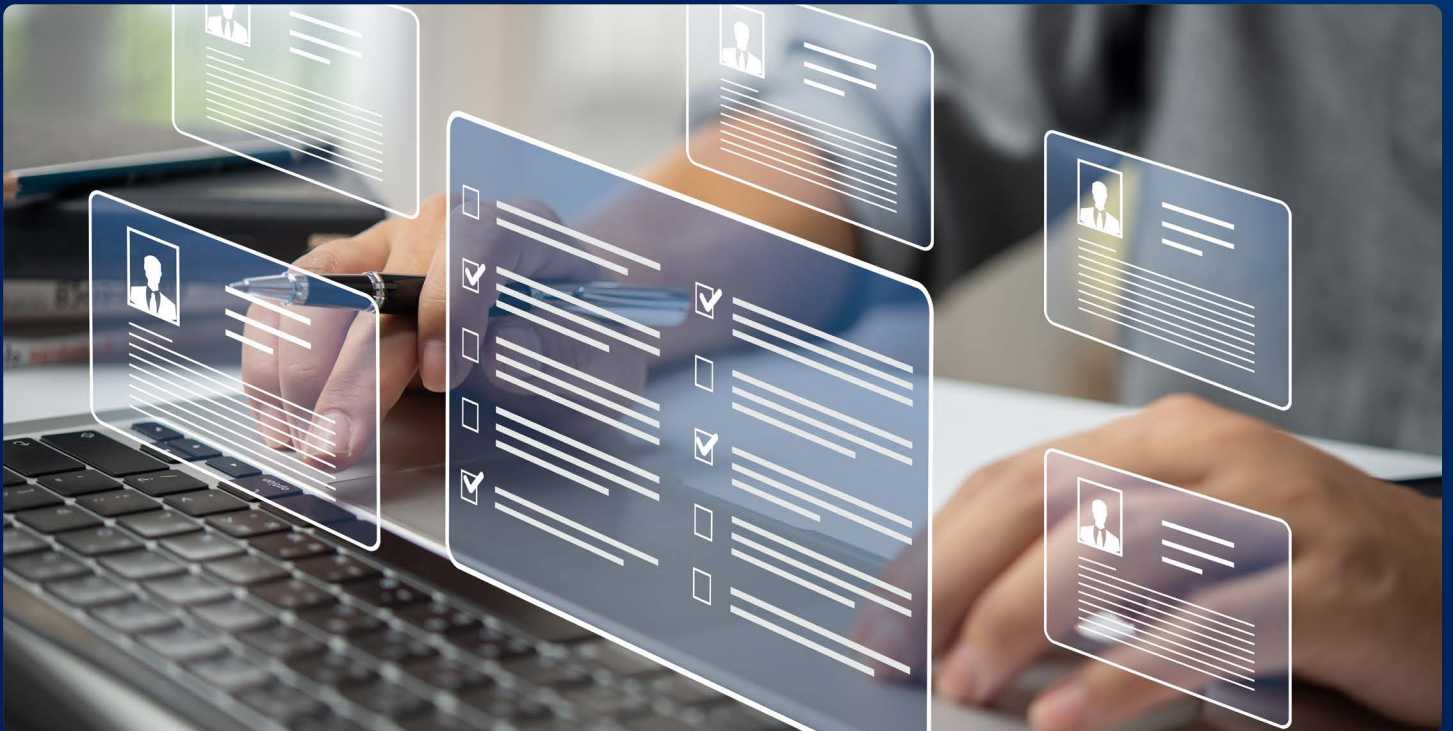
As Abby navigates the evolving landscape of HR benefits, she must also understand the cyclical nature of employee experiences, like how home construction follows a structured yet flexible process. This journey highlights the significance of strategic foresight, effective communication, and adaptability. Essentially, designing experience journeys strategically is a key aspect of HR management. It entails comprehending the cycle from both HR and employee perspectives to cultivate a more engaged workforce capable of thriving in all circumstances. By deliberately designing this journey, organizations can ensure that Abby's experience is as enriching as that of the employees she supports.





CHAPTER ONE

Creating Your Employee Benefits Strategic Blueprint



Creating Your Employee Benefits Strategic Blueprint

Crafting your employee benefits experience strategy is similar to creating a strategic blueprint for your organization's future success. Just like a skilled architect considers every detail when designing a building, you must carefully analyze the overall demographics of your employees to tailor benefits that meet their diverse needs. This data is the cornerstone of your strategy, ensuring that you provide valuable perks that resonate with your workforce. Additionally, understanding the landscape of your competitors can offer insights into industry trends and help you stay competitive in attracting and retaining top talent. By building upon this foundation of knowledge, you can shape a benefits package that not only supports your employees but also aligns with your company's long-term goals, as well as provides insights into employee attitudes, opinions, and behaviors regarding benefits.

When crafting your organizational strategy, the next pivotal step is embracing personalization. Tailoring your benefits to cater to the unique needs and preferences of different employee personas ensures that your initiatives are not just relevant but also engaging. Just like skilled builders utilize framing techniques to partition rooms and allocate space for specific functions, you can strategically segment your benefit goals to serve distinct purposes tailored to the diverse needs and aspirations of various employee groups based on different personas.

Next, as you move forward, you can establish robust analytics frameworks to ensure that valuable insights seamlessly flow through every corner of your organization. By leveraging data-driven decision-making processes concerning your benefits package and administration, you pave the way for strategic enhancements. This involves harnessing advanced analytical tools to extract, interpret, and apply meaningful insights derived from the data. Through this analytical journey, you gain a deeper understanding of emerging trends, identify potential gaps, and refine your benefits strategies with precision, ultimately amplifying their effectiveness.

Your strategic plan is electrified with innovative employee campaigns meticulously crafted to encourage specific benefit behaviors. These thoughtfully designed campaigns shed light on how employees can effectively engage with and optimize their benefits tailored to their individual life events. Picture these campaigns as the vital energy source propelling your overarching strategy forward, igniting unparalleled levels of engagement, heightening awareness, and sparking a wave of positive actions and behaviors across your workforce.

Essentially, when it comes to crafting a successful employee benefits experience strategy, it is crucial to lay a robust foundation based on comprehensive data analysis. This involves customizing benefits offerings to meet the diverse needs of employees, leveraging advanced analytics to gain meaningful insights into employee preferences and trends, and injecting vitality into the strategy by implementing targeted campaigns that resonate with the workforce. By integrating these elements thoughtfully, organizations can create a holistic and engaging benefits experience that fosters employee satisfaction and loyalty.



Electricity *Campaigns*

Our campaigns electrify engagement and continuously enhance our services through data analysis. We incorporate employee feedback, benefits literacy, and chatbot and call center interaction data to ensure our content is tailored to meet each organization's specific needs.



Plumbing *Analytics*

Powered by data analytics, we leverage employee feedback, benefits literacy, and interaction data from chatbots and call centers to refine our services. Additionally, we use analytics to customize our content, ensuring it aligns perfectly with each organizations' requirements.



Framing *Personalization*

Our personalization is based on our unique HR Benefits knowledge. We constantly improve it using feedback from employees, benefits understanding, and data from a chatbot and call center talks. We also adjust our content to fit each organization's needs.



Foundation *Data*

A good benefits foundation is rooted in data. Including crucial elements such as employee engagement metrics, comprehensive employee census data, and extensive payroll information.

Figure: Overview of Benefits Home Metaphor

Crafting a Transformative Employee Experience with Foundational Data

In today's evolving post-pandemic work landscape, focusing on enhancing employees' experiences is essential. While Forbes announced in January 2024 that "The Great Resignation is officially over—along with those substantial pay increases, recent data suggests," the lasting impact of younger workforce members' revised expectations, intensified during the pandemic, remains. It is crucial for organizations to uphold certain key principles, such as prioritizing employee engagement and fostering a company culture that goes beyond mere values to demonstrate these values in day-to-day business operations. The organizational culture significantly shapes employee confidence, motivation, and overall satisfaction. A motivated and engaged workforce is pivotal for organizational prosperity.

The HR benefits offered demonstrate a shared understanding between employer and employee, resembling family dynamics. While aspiring to a familial work atmosphere may seem cliché, my research highlights the crucial role culture plays in an organization's success, mirroring the nurturing of a supportive home environment. This analogy of a house underscores the significance of a sturdy foundation (data) tailored for purpose (framing), enriched with seamless insight (plumbing), and an enlightened employee experience (campaigns). How you interact with your product or service mirrors your employee experience externally, underscoring the importance of crafting a deliberate employee experience. While this book emphasizes the HR benefits aspects of your employees' experience, these techniques can be applied to any part of the employee experience where you aim to influence employee behavior. Crafting a purposeful benefits experience involves leveraging diverse skill sets within your organization, typically used for product or service development.

In this next section, we'll delve into the pivotal role that data plays in shaping the journey of your employees when it comes to their benefits, highlighting its impact on their overall experience and wellbeing.

Effective Employee Engagement Approach

Initiate the process by actively engaging in attentive listening sessions with your employees. To effectively foster this approach, adopt a comprehensive strategy that encourages employee involvement and facilitates the collection of valuable insights to enhance organizational understanding and decision-making processes.:

Regular Pulse Surveys: Implementing frequent pulse surveys is a proactive approach to maintaining a strong connection with employee satisfaction levels. This strategy allows for the timely identification and resolution of any areas that may benefit from enhancement, fostering a culture of continuous improvement and employee engagement within the organization.

Engagement Programs: From implementing recognition initiatives that celebrate employee accomplishments to organizing wellness challenges that promote health and wellbeing, our engagement programs are thoughtfully curated to cultivate a positive and dynamic work

environment. These programs typically involve encouraging behavioral changes to some extent, and you can leverage targeted campaigns to achieve this, similar to how a skilled Marketer strategizes and executes campaigns to drive desired outcomes.

At Businessolver, we leverage a sophisticated array of engagement surveys that delve deep into understanding employee perspectives on benefits. These surveys not only gauge comprehension and satisfaction levels, but also capture valuable insights into individual preferences. This enables us to stay ahead of changing needs, ensuring that we tailor our benefits offerings to suit evolving requirements effectively.

Utilizing Data for Workplace Enrichment

Gathering feedback marks the initial phase. The true value emerges when you analyze and act upon this information:

Analyzing Pulse Survey Outcomes: Employ data analysis techniques to uncover trends and patterns in pulse survey results, providing valuable insights for quick decision-making. By utilizing these refined methods inspired by UX and Marketing, businesses can promptly adjust and address emerging challenges and opportunities.

Implementing Feedback: Vital learnings gathered from a variety of feedback sources play a key role as the foundation for targeted enhancement initiatives. By effectively addressing your specific concerns and uplifting the overall work environment, these insights help foster a culture of continuous improvement and innovation within the organization.

Elevating Engagement Initiatives: Participation data and feedback collected from employee engagement in recognition and wellness initiatives play a crucial role in shaping the future iterations of campaigns. This iterative process ensures that your strategies continually evolve to have a more significant impact and stay closely aligned with your individual preferences and wellbeing goals. **Evolving Benefit Packages:** Finally, utilize this valuable insight to refine your benefits offerings, making them more aligned with your specific needs. By doing so, you can enhance your satisfaction and engagement levels, meeting both your individual requirements and those of your organization effectively.

Leveraging employee data to shape a meaningful benefits experience is critical, even when working with a healthcare analytics partner. While healthcare analytics provide valuable insights, they often miss the mark in capturing employees' genuine experiences and preferences regarding benefits. Directly collecting data from your workforce ensures a tailored benefits program that aligns with their specific needs and objectives, boosting employee engagement and contentment. By effectively harnessing and employing employee data, you can cultivate a work environment that not only meets, but surpasses expectations. This proactive, data-centric approach ensures that our workplace not only adapts alongside your team but also establishes a benchmark for your satisfaction and engagement. You're not just constructing a workforce; you're fostering a community where every individual feels respected, heard, and empowered.

Framing Your Benefits via Personalization

Developing a customized benefits strategy is essential for effectively engaging your workforce. Tailoring benefits to suit the diverse personas within your team ensures relevance and active participation. Just as construction framers partition specific spaces in a house, you are segmenting distinct groups in your population for tailored experiences. An often-underestimated aspect is the consideration of dependents. Creating a thoughtful HR benefits journey is important for boosting employee engagement and should encompass dependents like spouses and children, who play a significant role in benefit utilization. For this reason, involving them in the design phase is imperative.

Personalization is key in creating a meaningful HR benefits experience and can be customized for various subgroups within your employee population. By utilizing data, you can identify which employee subgroups will have the most significant impact on your benefits strategy. For example:

Factory Workers vs. Office Employees: These two groups may have different needs based on their work environments. For factory workers, a ‘Musculoskeletal Benefit’ that emphasizes physical health with offerings such as physiotherapy sessions, ergonomic assessments, and fitness programs could be beneficial. Conversely, office employees might find value in mental wellbeing initiatives like stress management workshops or meditation apps, given the sedentary and high-stress nature of their work.

Employees with Families vs. Singles: Family-oriented employees, may highly value workplace benefits that cater to their dependents’ needs. This could include comprehensive family health insurance plans, childcare assistance programs, and flexible work hour options to better balance their personal and professional lives.

Conversely, singles who are focused on their individual growth and wellbeing might value benefits like tailored professional development opportunities to enhance their skills, wellness initiatives to promote a healthy lifestyle, and engaging social events to foster connections with colleagues.

Younger Employees vs. Older Employees: Younger staff members could greatly benefit from employer support



Health insurance, a crucial part of an HR benefits package, has seen enhancements through the Affordable Care Act (ACA), extending coverage for dependents until age 26. While this has lightened the burden for many employees by ensuring their children’s access to essential healthcare, mere access doesn’t guarantee effective use. Businessolver’s Annual Empathy Series highlights that many dependents, especially young adults, struggle to grasp their benefits, leading to underutilization and unexpected costs. This lack of awareness can cause stress and dissatisfaction, tarnishing the employer’s image and diminishing benefits’ perceived value.

It’s crucial to expand HR benefits design to cover dependents. This includes crafting tailored content and campaigns for spouses and grown children. At Businessolver, we strategically leverage our mobile app to boost awareness, comprehension, and utilization of dependent benefits. A deliberate, strategic approach to this area can enhance dependents’ understanding, especially among adult children, benefiting your employees’ families and enhancing the benefits literacy of those transitioning from their parents’ plans to the workforce.

in managing their student loan repayments, as well as access to opportunities for continual learning and professional development to enhance their career growth. On the other hand, more experienced employees may value benefits such as comprehensive retirement planning services to secure their financial future and regular health screenings to prioritize their wellbeing and longevity.

Enhance the personalization of your benefits by customizing them to meet the distinct needs of individual employee subgroups. This approach can enhance the employee benefits experience, boosting job satisfaction and loyalty. Personalized initiatives can help employees feel valued, reinforcing the social contract between them and your organization. In addition, diverse strategies may be necessary to effectively serve these varied groups, insights for which can be drawn from your journey maps. For example, mobile apps could be instrumental in enhancing the experience of factory workers who predominantly access the internet via their smartphones.

As we will discuss in the next chapter, journey maps can also assist in identifying and harnessing the potential of benefits ambassadors within your employee population. These individuals can play a significant role in disseminating critical benefits messages across the organization. To facilitate this process, you can design their experience with shareable links to specific benefits details. This approach not only empowers them with the tools they need but also encourages a culture of information sharing, ensuring that all employees are well-informed about their benefits. Creating an HR benefits experience is much like constructing a robust house. Just as a frame gives a house its structure and support, a thoughtfully designed HR benefits experience forms the groundwork for employee satisfaction and wellbeing. Tailoring the benefits experience to dependents and other sub-populations strengthens the frame, enhancing resilience and effectiveness. This ensures that the organization can withstand external pressures, similar to how a well-built frame enables a house to endure various weather conditions. Ultimately, by boosting overall satisfaction and maximizing benefits usage, companies can establish a solid, enduring structure that provides genuine support for employees' and their families' health and financial wellbeing. Just as a well-built house stands the test of time, a well-crafted HR benefits experience is designed to last, offering comfort and security through a reliable social contract.

Flowing Insight Through Your Organization with Analytics

Data analytics allows us to make sense of employee feedback, their needs associated with their specific population demographics and to ultimately make predictions changing employee needs. Analytics can be viewed as a pipeline, where data flows from the source in its raw form and gets refined and transformed into meaningful insights. Just like how plumbing carries water to different parts of a building, analytics carries vital information to various levels of an organization. This flow is essential because it enables decision-makers at all levels to have access to timely, relevant, and accurate data. Because this insight needs to flow through the organization, a concept known as double loop learning comes into play. In the context of data analytics, it's not just about using the data to understand employee feedback and to predict changing needs based on specific population demographics. It's also about questioning and modifying the underlying assumptions and policies that led to the original data. This is where the 'double loop' comes in - the first loop uses the data to make changes, while the second loop involves reflecting on and altering our assumptions and strategies.

In the realm of data analytics, the process goes beyond utilizing data to comprehend employee feedback and anticipates evolving requirements aligned with distinct demographic segments. It delves into the realm of scrutinizing and adjusting the assumptions and policies that influenced the initial data. This is where the concept of the 'double loop' emerges - the initial loop leverages data for adjustments, while the secondary loop entails introspection and refining our assumptions and tactics for a more comprehensive analytical approach. By embracing this 'double loop' methodology, organizations can refine their data-driven decisions and foster a culture of continuous learning and improvement. This iterative process involves analyzing data in addition to reflecting on the underlying principles guiding the analysis, leading to more robust strategies and insights that drive sustainable growth and innovation.

These insights then flow to various parts of the organization, providing nourishment and enabling growth. Just as plumbing ensures water reaches all corners of a building, analytics ensure vital information is accessible at all levels of an organization. However, with double-loop learning, we don't stop at simply distributing the 'water'. We also assess the plumbing system itself. Are there any leaks or blockages? Is the water pressure adequate? Similarly, we examine our data collection methods, our analysis techniques, and our underlying assumptions. We reflect on whether our actions based on the initial insights were effective. We then modify our 'plumbing system' - our data analytics strategy - based on these reflections. In essence, double-loop learning enhances the 'plumbing system' of data analytics, ensuring efficient flow of insights and continuous improvement of the entire process.

Abby, the HR Administrator, actively seeks feedback and gains insights, particularly during the Data Gathering and Evaluation phase of her annual cycle. Our primary research at Businessolver has revealed that Abby's meticulous approach involves presenting insights and strategic recommendations to her Benefits Committee, consisting of the CEO, CFO, Chief HR Officer, and Benefits Director. This committee evaluates the effectiveness of core benefits such as medical, dental, and vision in meeting the workforce's needs. They also address any identified gaps by considering additional voluntary benefits. While secondary benefits with minimal cost implications require less committee approval, they remain crucial for potential cost savings. This interdisciplinary team collaborates to disseminate valuable insights across the organization, enabling adjustments in organizational policies that can impact benefits, and vice versa. Journey maps, which we will delve into in the following chapter, serve as invaluable system-thinking tools, playing a pivotal role in identifying policy conflicts or inconsistencies that could potentially confuse employees or influence their benefits experience. The double-loop approach acts as a conduit throughout the organization, facilitating the sharing of insights related to benefits to prompt essential policy changes if they are identified as the root cause.

Curating insights for Abby's Benefits committee is now streamlined with analytics and AI tools like Businessolver's ROI dashboards. By utilizing these tools, Abby can identify employee pain points, refine processes, and address coverage gaps, much like a plumber fixing a leaky faucet. All this valuable data and insight is visually represented on the employee journey map, aligning Abby and her Benefits Team with the current state of their employees' benefits journey. This alignment facilitates well-informed decisions for the future.

Equipped with data at their fingertips, the benefits committee can assess and make evidence-based decisions that enhance employee satisfaction and retention. They can also pinpoint areas for improvement and implement changes to ensure a seamless and satisfactory experience for employees. In addition, leveraging analytics and AI enables organizations to monitor trends in employee needs and preferences, enabling them to proactively provide competitive and relevant benefits.

The strategic fusion of advanced analytics and artificial intelligence (AI) has revolutionized how organizations design and enhance employee benefits programs. By leveraging data-driven analytics to derive actionable insights, companies can continuously improve their benefits offerings to meet the evolving needs of their workforce. These insights can be effectively communicated throughout the organization via an employee benefits journey map, facilitating a deeper understanding and enabling double-loop learning. The upcoming section delves into the significance of employee journey maps, highlighting their pivotal role in analyzing and enhancing employee benefits experiences. As analytics and AI technologies progress, organizations can anticipate more innovative methods to leverage data for strategic decision-making, ultimately boosting employee satisfaction and retention.

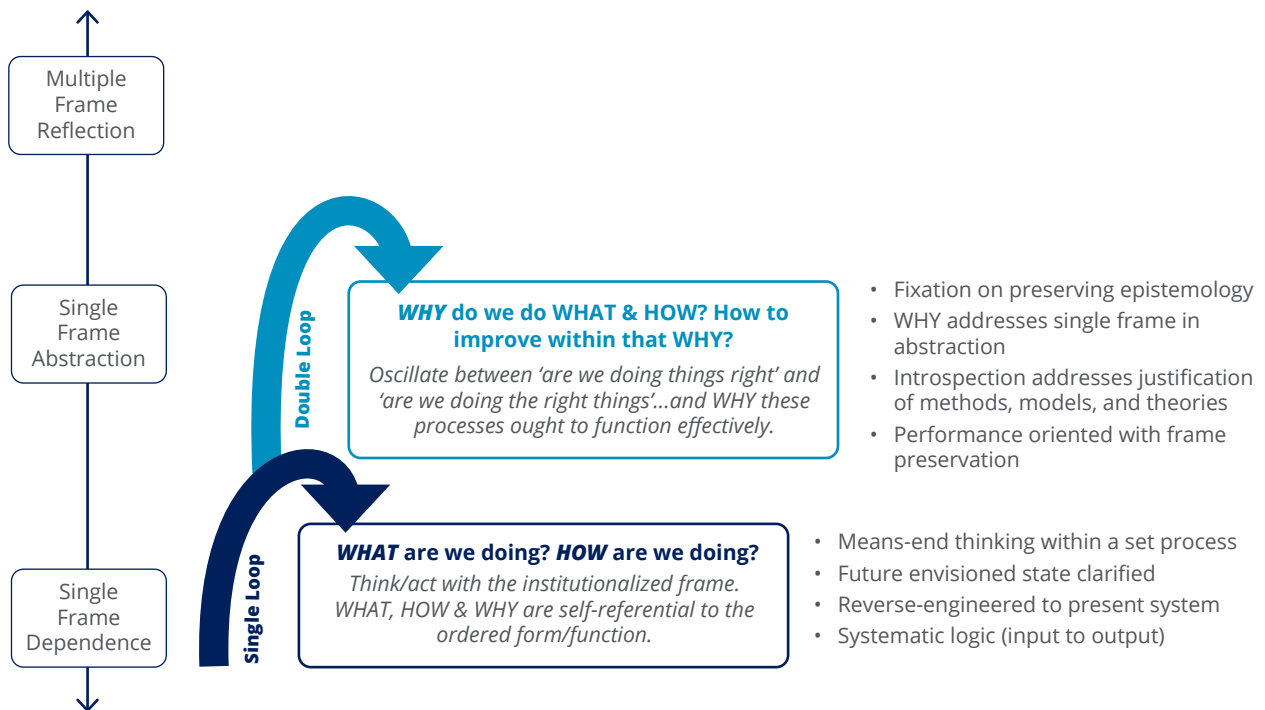


Figure: Double Loop Learning and Reflective Practice

Electrifying Utilization Through Engaging Benefits Campaigns

Intentionally designed benefits campaigns can power your benefits strategy. Creating customized and highly targeted campaigns that effectively convey the value and advantages of benefits packages to employees can significantly enhance engagement levels, improve retention rates, and foster a positive company culture. This strategic approach not only serves to inform employees about the available benefits but also encourages higher utilization and deeper appreciation of the offerings. Ultimately, the meticulous planning and execution of a benefits campaign play a pivotal role in influencing and shaping employee behaviors to better align with your overarching benefits strategy and organizational goals by:

Increasing Employee Awareness: A meticulously planned benefits campaign can heighten employee awareness regarding available benefits. Many employees may not have full knowledge of their benefits, and a campaign can spotlight these offerings, ensuring their effective utilization. **Enhancing Understanding:** A well-executed campaign can simplify intricate benefits information, making it easier for employees to comprehend their options. This can result in better decision-making when selecting and utilizing benefits.

Optimizing Utilization: When employees are well-informed and comprehend their benefits, they are more inclined to utilize them. This can lead to enhanced employee satisfaction and well-being, consequently boosting productivity.

Fostering Engagement: Benefits campaigns can promote engagement by engaging employees in interactive activities related to their benefits, such as webinars, Q&A sessions, or wellness challenges.

Improving Recruitment and Retention: Showcasing your benefits through campaigns can enhance your company's appeal to potential employees. For current employees, understanding and using their benefits can heighten job satisfaction, aiding in retention.

Promoting a Culture of Health and Well-Being: By emphasizing benefits like wellness programs, mental health resources, or physical therapy, campaigns can cultivate a culture of health and wellbeing within the organization.

Cultivating Peer Advocacy: Successful users of specific benefits can be highlighted in the campaign, encouraging others to do the same. This peer advocacy can significantly influence uptake. **Providing New Feedback Channel:** Conducting campaigns can offer HR valuable insights into what's effective and what's not, assisting them in continuously refining and enhancing the benefits strategy. **Developing HR benefits campaigns** can enhance your benefits strategy by boosting awareness, understanding, and utilization of benefits. Just like a marketing funnel, you can create benefits campaigns by identifying critical points in your employee journey map that need focus. Tailoring content based on where different segments of your employee population are in the funnel is vital. Utilizing a provider such as Businessolver enables even more personalized approaches down to the individual employee level.

The progression of your funnel could involve:



Let's delve into an illustration of developing an HR benefits campaign focused on raising awareness and encouraging the utilization of a musculoskeletal benefit for employees engaged in repetitive lifting tasks.

Segment Employees: Categorize your target employees into three groups - those unaware of the benefits, those confused, and those who have utilized them. Tailor your communication approach to suit each group.

Create Engaging Content: For those unfamiliar or confused about the program, generate compelling content showcasing the benefits of your musculoskeletal benefit. Include success stories, health tips, and specifics on physical therapy benefits.

Ensure Accessibility: Streamline access to the program by offering clear instructions on appointments, session expectations, and necessary documentation.

Regularly Remind: Send periodic reminders about the program and its benefits through emails, notices, team meetings, AI assistants like Sofia, or the mobile app.

Encourage Peer Advocacy: Encourage satisfied users to promote and share a QR code with their colleagues to delve deeper into the benefits. You can extract this data from your satisfaction surveys and integrate this valuable insight back into your campaign.

Monitor Usage: Track program usage with campaign dashboards to assess effectiveness and identify usage obstacles.

Review and Adjust: Continuously assess the program's impact, adapting communication strategies, program specifics, or incentives based on feedback and usage patterns.

Effective communication and easy program access are vital for employee success. Through consistent campaigns, HR can enhance employee comprehension, utilization, and satisfaction with benefits. This leads to improved recruitment and retention rates, higher productivity, and a happier workforce. Don't underestimate the impact of a well-planned benefits campaign in strengthening your employee benefits strategy!

Illuminating HR Benefits via a Campaign Funnel

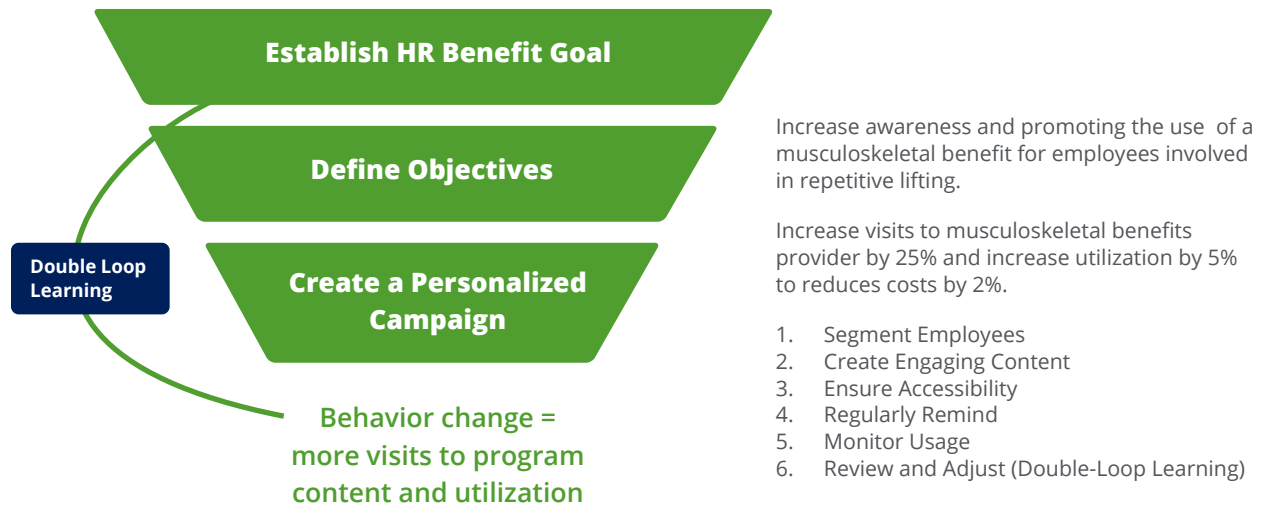


Figure: Simple campaign funnel



Using Employee Journey Mapping to Drive Forward Your HR Benefits Strategy

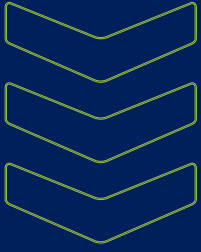
After carefully crafting your HR benefits strategy, collecting essential data, segmenting employee persona groups, sharing benefits data with your Benefits Committee, and promoting benefits through campaigns—we are now ready to track and assess your employees' benefit experience using data-driven employee journey mapping. An employee journey map visually narrates an employee's experience from the first interaction through their entire employment lifecycle. Utilizing the data collected and analyzed, it charts the employee's progression, highlighting their encounters at each stage. This invaluable tool offers a comprehensive view of the employee experience, enabling you to pinpoint the effectiveness of your strategy and identify areas for refinement. It provides a concrete method to assess the impact of your benefits strategy and campaigns, offering insights into their reception and utilization by employees.

As campaigns are initiated and executed, the journey map evolves to reflect the outcomes of these endeavors. Continuously referencing this map allows you to monitor the alignment of your strategy with your objectives. Essentially, the journey map acts as a strategic guide, steering your HR benefits strategy towards its objectives while prioritizing the needs and experiences of your employees. By keeping a close eye on this evolving map, you can identify areas of improvement, adjust strategies in real time, and ensure that your HR initiatives are in line with the overall organizational goals. This iterative process not only enhances the effectiveness of your HR benefits strategy but also fosters a culture of continuous improvement within your organization.

Footnotes

1. Cameron, Esther, and Mike Green. *Making Sense of Change Management: A Complete Guide to the Models, Tools and Techniques of Organizational Change*. Kogan Page.
2. Edwards, Martin R., and Kirsten Edwards. *Predictive HR Analytics: Mastering the HR Metric*. Kogan Page.
3. Guenole, Nigel, Jonathan Ferrar, and Sheri Feinzig. *The Power of People: Learn How Successful Organizations Use Workforce Analytics To Improve Business Performance*. Wiley.
4. Handley, Ann. *Everybody Writes: Your Go-To Guide to Creating Ridiculously Good Content*. Wiley.
5. Heath, Chip, and Dan Heath. *The Power of Moments: Why Certain Experiences Have Extraordinary Impact*. Simon & Schuster.
6. Liedtka, Jeanne, and Tim Ogilvie. *Designing for Growth: A Design Thinking Tool Kit for Managers*. Columbia University Press.
7. Marr, Bernard. *Data-Driven HR: How to Use Analytics and Metrics to Drive Performance*. Kogan Page.
8. Morgan, Jacob. *The Employee Experience Advantage: How to Win the War for Talent by Designing Spaces for Employees to Work, Collaborate, and Learn*. Wiley.
9. Nelson, Gregory S. *The Analytics Lifecycle Toolkit: A Practical Guide for an Effective Analytics Capability*. Wiley.
10. Pink, Daniel H. *Drive: The Surprising Truth About What Motivates Us*. Riverhead Books.
11. Podmajersky, Torrey. *Strategic Writing for UX: Drive Engagement, Conversion, and Retention with Every Word*. O'Reilly Media.
12. Peschl, Markus F. "Triple-loop learning as foundation for profound change, individual cultivation, and radical innovation: Construction processes beyond scientific and rational knowledge." *Constructivist Foundations*, vol. 2, no. 2-3, 2007, pp. 136-145.





CHAPTER TWO

Uncovering your Benefits Employee Experience



Understanding the Power of Journey Maps

In the previous chapter, we explored how Abby, the HR Administrator, can utilize campaigns like a Marketer to influence employee behavior. The employee journey map illustrates the real-time experience of Abby's employees, allowing her to strategically incorporate campaigns to shape specific employee behaviors aligned with targeted benefit objectives. Just as a geographical map guides you through unfamiliar terrain, a journey map navigates you through employees' interactions with your benefits package. It provides a data-driven perspective on your employees' experience, offering a comprehensive view of every employee interaction with your benefits programs from awareness to utilization. This map is constructed from concrete data gathered from sources such as employee surveys, demographics, and past benefits campaign results.

By using this tool, Abby can gain a deeper understanding of her employees, identifying pain points, moments of satisfaction, and areas for improvement. This in-depth examination of the employee landscape enhances decision-making, refines benefit design, and ultimately elevates the employee experience. Moreover, journey maps through double-loop learning encourage collaboration among departments, improving communication and alignment regarding employee benefits. They aid in strategy implementation by focusing on crucial touchpoints, policies, and progress tracking. Additionally, journey maps inspire innovation by providing a comprehensive look at the employee experience, sparking ideas for enhancing benefits and setting the company apart in terms of attracting and retaining talent.

Based on primary research by Businessolver, we have gained insights into the symbiotic relationship between Abby, the HR Administrator, and her employees' benefits journey:

- The Employee Pre-Enrollment Phase corresponds to Abby's Benefit Selection & Changes Phase.
- The Employee Enrollment Phase corresponds to Abby's Enrollment Phase.
- The Employee Post-Enrollment Phase corresponds to Abby's Data Gathering & Evaluation Phase.

In essence, the quality of your product or service directly mirrors the experience of your employees. There is an inherent connection between your customer journey map and the experience of your employees, whether explicitly recognized or not. Human Resources (HR) can utilize this link to engage individuals across the organization, such as those in UX and Marketing, in refining the mapping of the employee experience. While this approach can be applied holistically to the entire employee journey, the following section will specifically delve into mapping your employees' journey with HR benefits.

Benefits Employee Experience is the Blueprint for Benefit Enablement

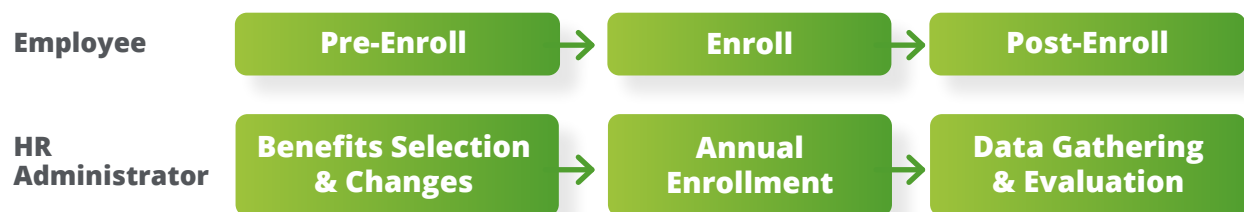


Figure: Unified view of Abby's Benefit Journey & her Employees' Benefit Journey

Structuring Your Employee Benefits Experience

Leveraging insights from a primary research study by Businessolver, a renowned research firm specializing in employee benefits, we delve into the mapping of the comprehensive employee benefits journey. This journey unfolds through three pivotal phases: Pre-Enrollment, where employees gear up for benefit selections; Enrollment, the phase of decision-making; and Post-Enrollment, focusing on maximizing the outcomes of benefit choices.

Throughout each phase of our process, we meticulously gather comprehensive data on the employee experience. This involves capturing nuances, addressing challenges, and celebrating achievements. The collected data is then subjected to thorough analysis to evaluate the overall wellbeing of the employee experience within each phase. Our approach starts by assessing the entire employee population, gradually shifting towards the development of persona-specific maps as Abby's team's core competency grows and evolves.

Pre-Enrollment

- **Research:** Identify the different touchpoints where employees learn about their benefits options. This could include HR meetings, emails, brochures, or the company intranet.
- **Data Collection:** Gather data on how effective these touchpoints are in informing employees. Surveys, interviews, or usage analytics can be used for this purpose.
- **Analysis:** Determine whether employees feel they have enough information to make informed decisions about their benefits. Identify any gaps or areas of confusion.

Annual Enrollment

- **Process Mapping:** Document each step in the enrollment process from the employee's perspective. This includes receiving enrollment information, deciding on benefits, completing forms, and submitting them.
- **Data Collection:** Collect data on the enrollment process. This could include the number of employees who complete enrollment on time, common questions or problems, and feedback on the process.
- **Analysis:** Analyze the data to see where there might be bottlenecks or issues in the enrollment process. Check if employees find the process straightforward and easy to complete.

Post-Enrollment

- **Usage Tracking:** Keep track of which benefits employees use and how often. This can give insights into what benefits are most valued.
- **Feedback:** Regularly collect feedback on the benefits and the enrollment process. This could be done through surveys, focus groups, or one-on-one interviews.
- **Analysis:** Use this data to identify any issues or areas for improvement. This could include benefits that are underused, processes that are confusing, or areas where communication could be improved.

Refinement

- Based on the data and analysis, adjust and improve the benefits offering, the enrollment process, and the communication around benefits.
- Implement changes and measure their impact. Continue to collect feedback and adjust as needed.

The employee HR benefits journey map provides a holistic view, covering the entire process from pre-enrollment to post-enrollment. It helps identify areas for improvement, ensuring that the organization offers benefits tailored to meet employees' needs and expectations. As Abby's team strengthens its core skills and knowledge through campaigns, the journey map is continuously updated with new insights to support ongoing learning. It can be customized to focus on specific employee personas within Abby's workforce. Utilized as a strategic thinking tool organization-wide, the journey map accelerates issue identification, fosters innovation, and enhances processes by enabling double-loop organizational learning.

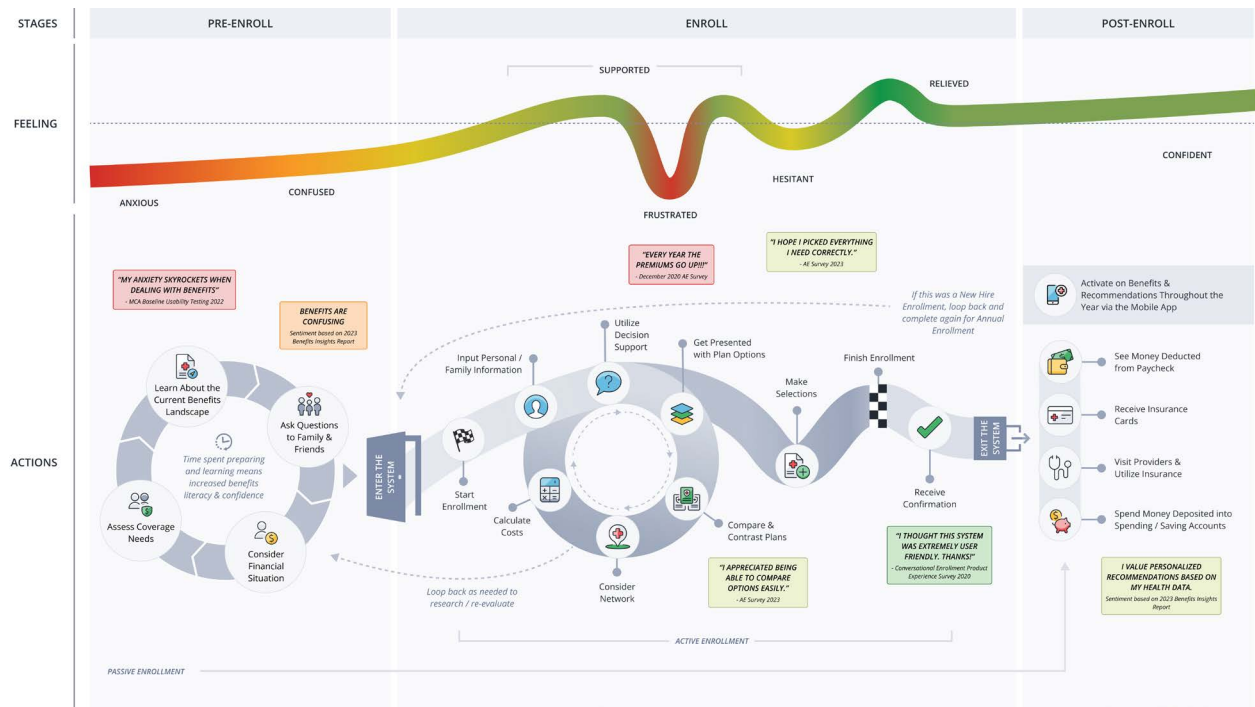


Figure: Omni-Channel User Journey



Creating an Employee HR Benefits Journey Map

Once you've crafted an HR Benefits journey map for employees, capturing their needs, preferences, and aspirations, it transforms into a comprehensive guiding blueprint. This blueprint serves as a strategic tool to navigate your organization towards achieving its HR benefits objectives, ensuring alignment with employee satisfaction, retention, and overall organizational success.

Here's how it works:

Identify Improvement Opportunities: The journey map highlights areas requiring attention or enhancement. For instance, if employees consistently express confusion about certain benefits during pre-enrollment, it signals a need for improved communication or education on these benefits.

Prioritize Actions: Utilize the journey map to prioritize actions based on their impact on the employee experience. If data indicates that the enrollment process is a significant pain point for employees, simplification of this process should take precedence.

Align Teams and Resources: The journey map fosters a shared understanding of the employee benefits journey, facilitating alignment among different teams (HR, management, internal communications) towards common objectives. This allows for coordinated efforts and efficient resource utilization.

Measure Progress: The journey map acts as a yardstick to gauge progress towards your goals. Regular updates with fresh data enable tracking of the effectiveness of implemented changes, allowing for necessary adjustments in strategies.

Encourage Innovation: The journey map might unveil unexpected insights into employee preferences or behaviors, sparking ideas for novel benefits or delivery approaches.

Fundamentally, a comprehensive benefits journey map is a strategic asset that serves as a valuable tool for organizations. By offering a detailed, data-driven view of the employee experience, it becomes instrumental in identifying key areas for enhancement and aligning efforts to maximize impact. This map not only enables monitoring of progress but also fosters a culture of innovation within the organization. Your benefits journey map plays a pivotal role in helping organizations achieve their HR benefits objectives. By continuously evolving and adapting to changing employee needs, it ensures that strategies are refined to drive meaningful behavior change. Through targeted campaigns and initiatives, the map acts as a guide for organizations to navigate the complex landscape of employee benefits while promoting ongoing learning and development opportunities.

Embracing Benefits Enablement

To successfully enable benefits, it is important to establish a comprehensive strategy that aligns with organizational goals and engages stakeholders at every level of the process. By cultivating a culture of continuous improvement and communication, the implementation of these benefits can lead to long-term success and growth within the company.

- **Define Targeted Behaviors:** Clearly outline behaviors aligning with HR benefit goals. Example: For increased enrollment, focus on active participation in benefit program sessions.
- **Execute Experiments:** Launch tailored campaigns to drive desired behaviors. For instance, send personalized reminders or offer incentives for engagement.
- **Deploy and Track:** Implement campaigns at key HR benefit stages. Monitor employee responses and participation closely.
- **Evaluate Outcomes:** Analyze results post-experiment. Measure impact on behavior and segment responsiveness.
- **Adjust and Repeat:** Refine strategies based on analysis. Conduct iterative experiments for continuous improvement.
- **Expand Successful Initiatives:** Scale effective campaigns to broader employee groups. Adapt approaches for diverse segments, certifying ongoing refinement and success.

A completed HR Benefits journey map for employees is a valuable tool that offers a comprehensive, data-driven insight into the employee experience. It serves to pinpoint improvement areas, coordinate actions, gauge progress, foster creativity, and ultimately, attain your HR benefits objectives. Understanding the employee journey represents just a fraction of the equation. To genuinely engage your workforce and cultivate behaviors that align with your HR benefits targets, it is key to master effective communication with your employees. The following section will walk you through several strategies to achieve this goal.

Footnotes

1. Pruitt, John, and Tamara Adlin. *The Persona Lifecycle: Keeping People in Mind Throughout Product Design*. Morgan Kaufmann, 2006.
2. Tullis, Thomas, and William Albert. *Measuring the User Experience: Collecting, Analyzing, and Presenting Usability Metrics*. Morgan Kaufmann, 2008.



CHAPTER THREE

Reaching Your Employee Audience



Understanding the employee experience is important, but it's just one piece of the puzzle. To best engage them, empower them to select the best benefits and make use of them. To involve your workforce and encourage behaviors that support your HR benefits objectives, mastering effective communication with your employees is key. This chapter will walk you through various strategies to achieve this.

Uncovering Employee Personas


Employee personas are a powerful tool for understanding the diverse needs within your workforce. They are fictional representations of various segments of your employees, designed based on data and insights about your team. These personas can help you tailor your approach to resonate with different groups. Generational differences can have a huge impact on how employees perceive and use benefits.

Consider the example of Taylor, a healthy, non-binary Gen Z employee coming off their parents' health plan and entering the world of HR benefits for the first time. Taylor is likely to have many questions about how to select and use benefits effectively. They may be looking for an easy-to-understand guide that breaks down complex terms and concepts into simple language. They might also appreciate a mentor or point contact like Businessolver's Sofia who they can reach out to with specific queries.

On the other hand, we have Jesse, a Millennial mother who is well-versed in choosing and using HR benefits. Jesse's current need is targeted support on how to use a Flexible Spending Account (FSA) to cover daycare expenses. She would benefit from detailed information about the process, perhaps through a step-by-step guide or a workshop focused on maximizing the use of FSAs for childcare.

With personas, you can gain insights into what each group values most in their benefits package. For instance, a new parent might appreciate childcare support or flexible work hours, while a recent graduate might find value in student loan assistance or career development programs. You can then design your benefits package to meet these varied needs. This might involve offering a selection of different benefits that employees can choose from, or customizing communication about benefits to underscore the aspects that are most relevant to each persona.

Understanding different personas allows you to customize benefits communication and education to suit their specific requirements. For example, consider creating a detailed 'Benefits 101' guide or hosting a Q&A session for new hires like Taylor. For employees like Jesse, a workshop focusing on family benefits or personalized consultation sessions can be beneficial. Successful benefits implementation hinges on acknowledging the diverse needs of your workforce. By segmenting your audience and comprehending their individual requirements, you can craft an effective, engaging, and inclusive benefits strategy. Approach it with a marketer's mindset.





TAYLOR


Gender: Fluid
Age: 20
Marital Status: Single
Dependents: None
Annual Income: Student


Young & Healthy


Taylor is currently a sophomore in college and is studying public policy. Taylor's future goals include working toward improving healthcare policy for the LGBTQ+ community. Taylor self identifies as a "digital device addict" and they're often found using texting and social media for social connections and various newsfeeds to stay relevant. Not having much in savings or a rainy-day fund along with watching friends and family struggle through the recent pandemic and the great recession has been a huge motivator in wanting to begin setting smart financial goals to start saving for their future.


 **Health: Very Healthy**




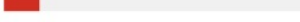
 **Physical Activity: High**




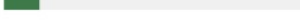
 **Savings: Low**




 **Healthcare Knowledge: Low**




 **Prescription Usage: Low**




 **Preferred Technology:**


- Extremely comfortable with technology
- Always has smartphone
- Uses wearable devices to monitor and track health and physical activity.
- Prefers the convenience of virtual care over in person doctor visits.


 **Challenges / Needs / Goals:**

- Finishing education and getting a job
- Establishing financial security for the future
- Saving money on healthcare costs when possible. This can mean spending less on preventative care.

 **Behaviors**

- Expects quick feedback and authenticity from brands they choose to align with.
- Discontent with traditional healthcare models, doesn't have a PCP, instead prefers to go to walk in clinics on as needed basis, use telemedicine and look to alternative medicine.







JESSE


Gender: Female
Age: 36
Marital Status: Married
Dependents: 1 Young Child
Annual Income: \$52,000


Average Health


At 36, Jesse is married with her second child on the way. Jesse has an income of \$52,000/yr, but it's been stretched thin with her growing family. She's looking at ways to advance her career in the near future and considering more education. When she was younger, she was an avid runner but has found less time to exercise since starting a family. Jesse and her husband both fill a few prescriptions regularly. Between her son's recent visit to the ER and her frequent prenatal visits, she has started to learn more about the details of her healthcare coverage.

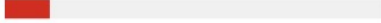
 **Health: Healthy**





 **Physical Activity: Moderate**





 **Savings: Low**




 **Healthcare Knowledge: Moderate**




 **Prescription Usage: Moderate**




 **Preferred Technology:**

- Desktop and mobile phone
- Checks email on her phone regularly
- Prefers text for important items like matters related to her family

 **Planned Life Events:**

- Baby

 **Challenges / Needs / Goals:**

- Getting more education to help advance her career
- Finding time to be healthier
- Balancing a busy home worklife and needing everything else to be as simple as possible




Figure: Sample employee personas



Building HR Benefit Campaign Content

Developing engaging benefit campaign content requires a strategic and thoughtful approach. It begins by setting a specific and measurable benefit goal that aligns with your strategy. For instance, you might aim to boost awareness and promote the use of a musculoskeletal benefit for employees involved in repetitive lifting. Next, establish measurable objectives that support the main goal and implement them through campaigns effectively. Once you have a clear goal and objectives, proceed to craft your campaign content. I suggest following a structured approach, allowing flexibility to interchange modules for similar benefit types as you discover effective strategies. Below is a detailed guide to assist you in creating compelling campaign content, using the promotion of a musculoskeletal benefit as an illustration.

Step 1: Segment Employees

To effectively tailor your communication strategies, start by segmenting your employees into three distinct groups based on their familiarity with musculoskeletal benefits:

- **Unaware:** These individuals lack awareness of the musculoskeletal benefits available to them. They may benefit from introductory information to educate them on the advantages.
- **Confused:** This group comprises employees who possess some knowledge about the benefits but require clarity on how to fully leverage them. Providing detailed guidance and support can help them make the most of these offerings.
- **Utilizers:** Employees in this category have already taken advantage of the musculoskeletal benefits provided. Recognizing their proactive approach, offering advanced resources or additional incentives can further enhance their experience.

By acknowledging these varying levels of understanding and engagement, you can tailor your messaging to effectively reach and engage each group.

Benefits Awareness/Utilization Continuum

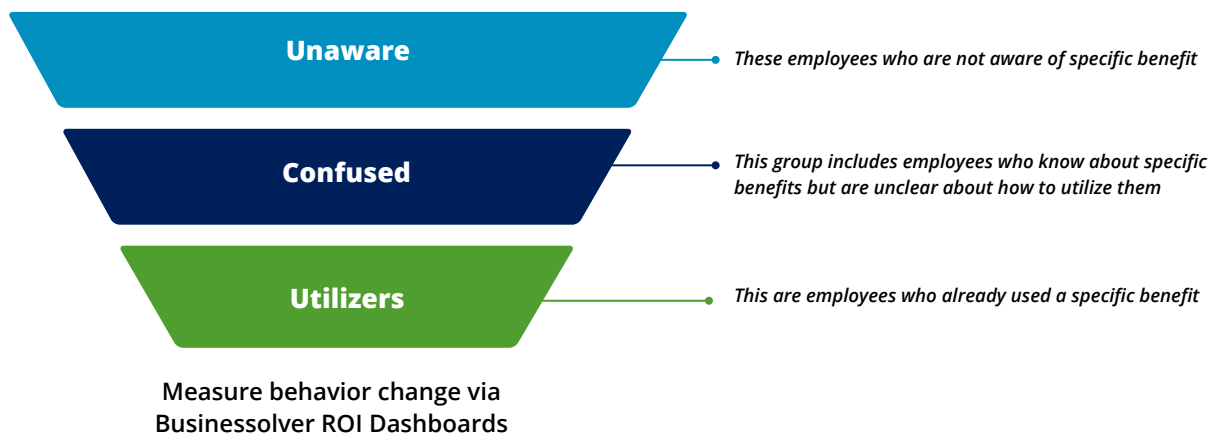


Figure: Benefits/Awareness Continuum

Step 2: Creating Engaging Personalized Content

Develop a comprehensive communication strategy for each group. This could include a combination of channels such as emails, newsletters, posters, or a mobile app. The key is to ensure that your message reaches all employees.

Comprehensive Communication Strategy for Promoting Musculoskeletal Benefits:

For the *Unaware Group*

This group of employees is not aware of the musculoskeletal benefits. Our goal is to inform and educate them about the existence and importance of these benefits.



Emails: Send an introductory email explaining the benefits, why they are important, and how they can be accessed. Be sure to use layman's terms to avoid any confusion.



Newsletters: Include a section in your company newsletter dedicated to health benefits, spotlighting the musculoskeletal benefits in one issue.



Posters: Place eye-catching posters around the workplace in high-traffic areas, like the break room or near the elevators. The posters should highlight the key points about the benefits.



Mobile App: Send push notifications about the new benefit. Also, consider a dedicated section in the app where employees can explore all health benefits in detail.

For the *Confused Group*

These employees know about the benefits but are unsure about how they work. Our goal is to provide clear, detailed information to remove any confusion.



Emails: Send out a detailed FAQ email that addresses common questions and concerns. Also consider setting up a dedicated email address where employees can send their specific queries.



Newsletters: Regularly feature real-life stories of employees who have successfully utilized the benefits. This will provide the confused group with practical examples and may answer some of their questions.



Posters: Create infographics that break down the process of accessing and using the benefits into simple, easy-to-follow steps.



Mobile App: Incorporate an interactive guide or tutorial in the app that walks employees through the process of utilizing the benefits.

For the Utilizers Group

These are employees who have already used the musculoskeletal benefits. Our goal is to keep them engaged, encourage them to continue using the benefits, and potentially turn them into advocates.



Emails: Send personalized emails thanking them for using the benefits. You could also ask for their feedback or testimonials to improve the program and encourage others to use it.



Newsletters: Feature these employees' success stories, with their permission, to inspire others.



Posters: Posters can be used to remind employees of advanced or additional benefits they may not be utilizing fully.



Mobile App: Use the app to send personalized reminders for appointments or follow-ups. Also, consider giving them access to advanced features or rewards as a token of appreciation for their engagement.

Effective communication relies on consistency, clarity, and engagement. It's vital to consistently evaluate and adapt your strategies using input from employees and their level of involvement. As you grow in expertise, enhance your capacity to recognize content users willing to advocate for your brand, sharing their positive encounters with coworkers who could also enjoy similar benefits like musculoskeletal advantages.

Leveraging Standard Social Pressure



In the realm of HR benefits, understanding your employees and their needs is a crucial initial step. To truly instigate behavioral change and promote the adoption of specific benefits, harnessing standard social pressure is key - the sway a group has over its members to conform to certain behaviors. This influence can significantly impact employee behavior towards embracing HR benefits. Stemming from our innate desire to belong, standard social pressure can nudge employees to conform to behaviors considered standard within their organization.

For instance, envision an organization aiming to boost participation in its wellness program. The HR team could highlight employees actively engaging in the program and reaping evident health benefits. Showcasing these success stories can establish a norm where involvement in the wellness program becomes customary within the organization.

Another scenario could involve introducing a new flexible work policy to enhance work-life balance. HR could present accounts of employees effectively managing personal and professional commitments through the policy. Witnessing these positive experiences can create standard social pressure among other employees to also embrace this benefit.

Additionally, the impact of employee influencers should not be overlooked. These individuals, respected and credible among peers, can magnify the message and drive desired behaviors across the organization. By leveraging standard social pressure, organizations can effectively steer behavioral change and enhance engagement with HR benefits. Remember, cultivating a supportive and inclusive culture where positive behaviors are acknowledged and rewarded is key to success.

Step 3: Ensure Accessibility

Making your benefits program easy to access for employees is a major aspect of encouraging utilization. This is where the expertise of your User Experience (UX) team can be invaluable. They can help you conduct usability testing on your benefits utilization process, which can provide insights into potential pain points, gaps in benefits literacy, and opportunities to simplify the utilization process.

At Businessolver, we approach these tasks with meticulous care and keen attention to detail. Regular usability studies are conducted on our program to ensure it precisely meets user needs. Our comprehensive evaluation of campaign effectiveness allows us to refine strategies for optimal outcomes and to share insights derived from our entire client base. Our dedicated Customer Experience services deliver tailored custom communications, guaranteeing a personalized touch in every interaction.

Step 4: Regularly Remind

To keep the benefits program at the forefront of employees' minds, it's necessary to send regular reminders. These can be disseminated through various channels such as emails, company notices, team meetings, AI assistants like Sofia, or the company's mobile app.

At Businessolver, we craft reminders for each stage of the employee benefits journey: pre-enrollment, enrollment, and post-enrollment. This ensures that employees receive timely and relevant information throughout their interaction with the benefits program. Additionally, our Customer Experience Team is ready to help you develop comprehensive campaigns that align with your overarching benefits strategies. Our aim is to enhance employee engagement and benefits utilization through a personalized and strategic approach. For clients utilizing Sofia, we provide tailored nudges that align with your specific goals and campaigns. Our mobile app clients can also harness the app's potential to deliver strategic behavioral nudges and address personalized inquiries through Sofia, conveniently accessible on employees' and dependents' devices.

Research shows that reminders significantly improve productivity by reducing missed opportunities due to forgetfulness. Automated reminders have been shown to effectively nudge teams into action, increasing task management skills. Reminders can also reduce no-shows and boost engagement, especially when they are scheduled and recurring. However, while implementing reminders, it's important to consider potential disadvantages such as information overload or annoyance, and devise strategies to mitigate these risks. For this reason, sending periodic reminders is not just about keeping employees informed, but also about enhancing their experience, driving program utilization, and ultimately supporting the achievement of your benefits strategy.

Step 5: Monitor Usage

Businessolver clients who utilize the custom communication services provided by our Customer Experience Team not only benefit from personalized, targeted messaging, but also gain access to our comprehensive campaign tracking dashboards. This powerful tool offers a wealth of data that can be used to refine and optimize communication strategies over time.

Benefits of Using Campaign Tracking Dashboards

Real-Time Monitoring: Our campaign tracking dashboards provide real-time updates on the performance of your communications campaign. This allows for quick adjustments if certain aspects of the campaign are not performing as expected. **Data-Driven Decision Making:** By providing a wealth of data, our dashboards support evidence-based decision-making. This can lead to more effective and efficient campaigns, as changes are driven by data, not assumptions.

Performance Analysis: With our dashboards, you can easily analyze the performance of different aspects of your campaign. This can help identify which strategies are working well and which may need adjustment.

Increased Transparency: Our dashboards offer complete transparency into your campaign's performance. You can see exactly how your campaign is doing at any given moment, encouraging trust and open communication between your team and ours.

Improved ROI: By tracking the performance of your campaign, you can make sure that your resources are being used effectively and efficiently. This can lead to an improved return on investment (ROI) for your communications efforts.

In conclusion, Businessolver's campaign tracking dashboards are an invaluable tool for businesses seeking to maximize the effectiveness of their communication strategies. By providing real-time data and insights, these dashboards allow for ongoing optimization, ensuring that your campaigns continue to evolve and improve over time.



What are Campaign Tracking Dashboards?

Campaign tracking dashboards are visual representations of key metrics and data related to a specific campaign. These dashboards provide a snapshot of the campaign's performance in real-time, allowing businesses to monitor progress, identify trends, and make informed decisions based on the collected data.

Step 6: Review and Adjust

Regularly reviewing the impact of your program is crucial for its success. Consider feedback and usage patterns to tailor your communication strategies, fine-tune program specifics, and adjust incentives as needed. Remember, an effective campaign evolves based on the genuine needs and feedback of its audience, securing relevance and engagement. By following these steps, you can develop and execute a highly successful HR benefit campaign that promotes and enhances musculoskeletal benefits for all employees within your organization.

After exploring how Abby the HR Admin can precisely target employee persona groups and influence their benefits behavior, the next chapter will focus on crafting a detailed content plan framework tailored specifically for HR benefits management. This comprehensive framework plays a vital role in establishing a strong foundation for developing scalable and highly effective communication strategies that align closely with your benefits program's strategic goals. By adopting this approach, your messaging becomes more impactful, and will resonate deeply with your target audience, enhancing overall engagement levels and cultivating greater employee satisfaction with the benefits they receive.



Footnotes

1. Heath, Chip, and Dan Heath. "Made to Stick: Why Some Ideas Survive and Others Die". Random House, 2007.
2. Halvorson, Kristina, and Melissa Rach. "Content Strategy for the Web". New Riders, 2012.
3. Handley, Ann. "Everybody Writes: Your Go-To Guide to Creating Ridiculously Good Content". Wiley, 2014.
4. Liedtka, Jeanne, and Tim Ogilvie. "Designing for Growth: A Design Thinking Tool Kit for Managers". Columbia University Press, 2011.
5. Pink, Daniel H. "Drive: The Surprising Truth About What Motivates Us". Riverhead Books, 2009.
6. Podmajersky, Torrey. "Strategic Writing for UX: Drive Engagement, Conversion, and Retention with Every Word". O'Reilly Media, 2019.
7. Pruitt, John, and Tamara Adlin. "The Persona Lifecycle: Keeping People in Mind Throughout Product Design". Morgan Kaufmann, 2006.
8. Tullis, Thomas, and William Albert. "Measuring the User Experience: Collecting, Analyzing, and Presenting Usability Metrics". Morgan Kaufmann, 2008.
9. Heath, Chip, and Dan Heath. "Switch: How to Change Things When Change Is Hard". Broadway Books, 2010.
10. Heath, Chip, and Dan Heath. "The Power of Moments: Why Certain Experiences Have Extraordinary Impact". Simon & Schuster, 2017.



CHAPTER FOUR

Creating a Successful HR Benefits Communication Strategy



Creating Your Content Plan

Developing a well-structured content plan framework tailored specifically for HR benefits content creation plays an important role in generating scalable and impactful communications that closely align with the strategic objectives of your benefits program. This approach allows your messaging to resonate well with your target audience, enhancing overall engagement and satisfaction with the benefits offered.

As discussed in the last chapter, it is important to start by understanding who you are communicating with. Different groups within your organization may have different needs and preferences when it comes to benefits. Segment your audience into different personas, like Gen Z employees, millennial parents, or retirees for example.

- 1. Define Your Goals:** What do you want to achieve with your content? This could be increasing awareness about a new benefit, driving enrollment in a program, or educating employees about how to maximize their benefits.
- 2. Personalize Your Content:** Tailor your content to the needs and preferences of different audience segments. Personalization can increase engagement and make the content more relevant.
- 3. Choose Your Medium:** Decide on the best way to deliver your content. This could be through emails, blog posts, webinars, handouts, or face-to-face meetings. Consider your audience's preferences and the nature of the information you're sharing.
- 4. Develop Your Message:** Craft clear and engaging content that resonates with your audience. Use simple, easy-to-understand language and break down complex concepts into bite-sized chunks. Include actionable steps where possible.
- 5. Schedule and Deliver:** Plan when and how you deliver your content. Timing can be crucial, especially when dealing with time-sensitive matters like enrollment periods.
- 6. Collect Feedback:** After delivering your content, seek feedback from your audience. You can use surveys, focus groups, or one-on-one discussions to understand what worked well and what could be improved.
- 7. Refine and Repeat:** Based on the feedback, refine your approach, and update your content as necessary. Remember, communication should be an ongoing process.

By adhering to this framework, you can ensure that your HR benefits content is engaging and tailored to meet your employees' needs. This approach can enhance comprehension and utilization of benefits, resulting in increased employee satisfaction and retention. Now, let's explore how you can leverage the employee personas we previously discussed to craft compelling employee benefits campaigns that align with your organizational objectives.

Creating Content That Connects to Each Unique Employee's Story (Personalization by Persona)

Using personas to understand employee needs is a valuable strategy for shaping and communicating HR benefits. By creating personas that represent different employee demographics based on their common traits and needs, you can set more precise and targeted goals. The goal is to grasp the distinct needs, behaviors, and concerns of these groups to provide personalized and impactful benefits. This approach ensures that benefits resonate with employees on a deeper level, creating a more engaged and satisfied workforce. Begin by segmenting your workforce into specific groups, considering factors such as age, life stage, job role, family situation, health needs, and more. For example, these groups may consist of 'Baby Boomers nearing retirement', 'Millennials with young families', or 'Gen Z recent graduates'. Tailoring benefits to meet the diverse needs of employees can lead to increased loyalty, productivity, and overall wellbeing within your organization.

Next, use these personas to personalize your communication strategy. Different groups will have distinct preferences in how they wish to receive information, such as the kind of language that resonates with them, and the type of support they need to comprehend and utilize their benefits. For younger employees, like Taylor our Gen Z employee stepping into the world of HR benefits, the process can seem overwhelming. The focus should be on simplifying the information and explaining how a spending account can help manage healthcare costs.

It's also necessary to present the various options available, such as Health Savings Accounts (HSAs) or Flexible Spending Accounts (FSAs) and explain their unique features and potential benefits. The aim is to enhance their confidence in making benefit selections that suit their personal needs. On the other hand, for new parents like Jesse, our millennial mom, the explanation should revolve around how they can effectively utilize their Flexible Spending Account for managing daycare costs. They need to understand that FSAs allow the use of pre-tax dollars for eligible dependent care services, potentially leading to significant savings. The process of utilizing FSA for daycare, including ensuring provider eligibility, submitting claims, and the importance of re-enrollment each year, should be clearly explained.

Customizing the approach enables HR to cater to individual employee needs, guiding them towards behaviors that optimize their benefits. This strategy boosts employee comprehension and utilization of benefits, resulting in higher satisfaction and engagement. To expand your content reach, utilize a reusable framework that facilitates the development and alignment of content to distinct personas and their specific requirements.

Defining Your Content Framework

A content framework is a structured plan that helps organizations create, deliver, and manage content effectively. It outlines content types, target audience, distribution channels, update frequency, and success metrics. This roadmap ensures consistency and quality in content creation. Content frameworks are needed for:

- 1. Consistency:** Maintaining a uniform brand voice across platforms enhances audience recognition.
- 2. Efficiency:** Streamlining content creation saves time and resources.
- 3. Scalability:** Allows for increased content production without sacrificing quality.
- 4. Relevance:** Tailoring content to audience needs boosts engagement.
- 5. Measurement:** Including success metrics aids in tracking content performance and ROI.

A content framework is essential for consistent, efficient, scalable, relevant, and measurable content delivery, leading to improved engagement and results.

Content frameworks form the foundation for implementing the concept of benefits enablement as outlined in Chapter 2. Here's how this framework can be put into action:

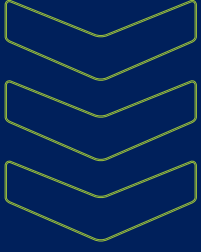
- 1. Define Your Objectives:** Start by pinpointing your HR benefit goals, whether it's boosting enrollment, enhancing wellbeing, or increasing employee retention. Make sure these objectives are in line with the broader organizational goals.
- 2. Create a Personalized Campaign:** Match your objectives with specific personas and choose the content formats that best convey your message to each persona, such as infographics, videos, or written articles.
- 3. Establish Distribution Channels:** Identify the most effective channels for reaching different audience segments.
- 4. Set Update Frequency:** Determine how frequently you'll refresh your content to maintain its relevance.
- 5. Define Success Metrics:** Identify the key performance indicators (KPIs) that will gauge the effectiveness of your content in meeting your objectives.
- 6. Implement and Monitor:** Utilize your framework to develop and share content, while regularly monitoring and adjusting as necessary for optimal impact.

By following these steps, you can create a customized content framework that bolsters your HR benefit strategies and achieves the desired results. Remember to regularly reassess and adjust your framework as needed, keeping up with the evolving needs of your workforce. With a well-defined content framework in place, you can effectively communicate benefits and drive employee engagement, contributing to the overall success of your organization. So, start creating your personalized content framework today and see the positive impact it has on your employees' satisfaction and wellbeing!



Footnotes

1. Heath, Chip, and Dan Heath. "Made to Stick: Why Some Ideas Survive and Others Die". Random House, 2007.
2. Halvorson, Kristina, and Melissa Rach. "Content Strategy for the Web". New Riders, 2012.
3. Handley, Ann. "Everybody Writes: Your Go-To Guide to Creating Ridiculously Good Content". Wiley, 2014.
4. Liedtka, Jeanne, and Tim Ogilvie. "Designing for Growth: A Design Thinking Tool Kit for Managers". Columbia University Press, 2011.
5. Pink, Daniel H. "Drive: The Surprising Truth About What Motivates Us". Riverhead Books, 2009.
6. Podmajersky, Torrey. "Strategic Writing for UX: Drive Engagement, Conversion, and Retention with Every Word". O'Reilly Media, 2019.
7. Pruitt, John, and Tamara Adlin. "The Persona Lifecycle: Keeping People in Mind Throughout Product Design". Morgan Kaufmann, 2006.
8. Tullis, Thomas, and William Albert. "Measuring the User Experience: Collecting, Analyzing, and Presenting Usability Metrics". Morgan Kaufmann, 2008.
9. Heath, Chip, and Dan Heath. "Switch: How to Change Things When Change Is Hard". Broadway Books, 2010.
10. Heath, Chip, and Dan Heath. "The Power of Moments: Why Certain Experiences Have Extraordinary Impact". Simon & Schuster, 2017.



CHAPTER FIVE

Leverage Your Content via Campaign



In this chapter, we will explore how to effectively leverage your content through campaigns. We'll cover strategies to influence employee behavior, set campaign objectives, distinguish between awareness and utilization campaigns, manage your campaign calendar, and more.

At Businessolver, we recognize the perpetual challenges Abby, the HR Administrator, faces. Her responsibilities align with Maslow's hierarchy of needs. Initially, Abby focuses on boosting HR efficiency and minimizing risks, with a focus on service delivery, data accuracy, cybersecurity, and other necessary aspects of benefit administration. We provide a seamless environment for Abby to focus on strategic initiatives.

As she ascends the hierarchy, Abby transitions to cost and trend management, utilizing tools such as decision support, dependent verification, one wallet, plan support, and our advanced ROI dashboards. At the top of the pyramid, Abby emphasizes employee engagement and productivity. We support her with tailored content and campaign management through personalized Customer Experience (CX) campaigns that can be monitored via our ROI dashboards. At this stage, our aim is to influence employee behavior positively, enhancing their overall well-being and benefits utilization.



Figure: Businessolver Market Segmentation Pyramid

Changing Employee Behavior

The initial phase in establishing a successful campaign lies in understanding how to influence employee behavior effectively. This encompasses not only pinpointing the specific actions you desire your employees to undertake but also crafting the campaign in a manner that genuinely inspires and motivates them to act upon it. For example, if the goal is to boost participation in a wellness initiative, you could develop a campaign that showcases the program's advantages comprehensively, coupled with offering a streamlined enrollment process for easy access (refer to "Ensure Accessibility" in Chapter 3 for more details).

Establish Campaign Objectives

Prior to launching a campaign, it is key to define clear objectives. What are your goals for the campaign? Whether it is creating awareness about a new benefit or enhancing the utilization rate of existing ones, having well-defined objectives will shape your campaign strategy and aid in evaluating its effectiveness.

I suggest aligning your campaigns and their content with your organizational objectives. For example, if you are aiming to improve productivity by addressing absenteeism, consider setting a target to boost the participation in your wellness program. A targeted employee campaign focused on this goal could highlight the promotion of existing health and wellness initiatives, educate employees on the benefits of preventive care, and encourage active engagement. The campaign should emphasize the direct advantages to employees, such as better health, increased vitality, and potential longevity, along with the indirect benefits like potential reductions in healthcare expenses.



Understanding Awareness vs. Utilization Campaigns

Awareness campaigns play a significant role in informing employees about the benefits available to them, setting the stage for utilization campaigns that encourage employees to make the most of these resources. While awareness is an important initial step, the aim is to drive utilization to ensure that employees genuinely benefit from the programs provided.

In Chapter 3, we delved into an effective strategy for orchestrating benefits campaigns by segmenting them into three key groups: the Unaware Group, Confused Group, and Utilizers Group. The Unaware Group benefits from awareness campaigns, while the focus shifts to utilization campaigns for the Confused and Utilizers Groups. To illustrate, campaigns tailored for each group might take the following forms:

- **For the Unaware Group:** A campaign spotlighting the wellness program's features and benefits, coupled with a clear call-to-action for enrollment.
- **For the Confused Group:** A campaign aimed at dispelling misconceptions or confusion surrounding the wellness program, offering easy access to resources and support for effective program utilization.
- **For the Utilizers Group:** A campaign dedicated to promoting continued utilization of the wellness program and reinforcing its benefits.

Businessolver's dedicated Customer Experience Team stands ready to oversee these campaigns on your behalf, ensuring smooth execution. Our innovative ROI Dashboards also furnish you with comprehensive insights to closely monitor and analyze the impact of these initiatives.

Balancing Your Campaign Calendar

Maintaining a balanced campaign calendar is paramount. Bombarding employees with too many campaigns can cause information overload and reduce engagement. Conversely, having too few campaigns may mean missing opportunities to promote benefits and involve employees. When crafting a well-rounded campaign calendar, Abby the HR Admin should consider key principles from marketing and behavioral sciences by:

1. **Addressing "Choice Overload":** The concept of "Choice Overload" suggests that when people are bombarded with too many options or overloaded with information, they can become overwhelmed and find it difficult to make a decision or take action. Abby should keep this in mind while designing her campaign calendar. By avoiding back-to-back campaigns and giving employees time to process the information from each campaign, she can avoid creating an overwhelming experience. This can encourage higher engagement levels as employees will feel more comfortable and capable of making informed decisions.

- 2. Applying the 'Recency Effect':** The "Recency Effect" is a psychological principle that states people tend to remember the latest information they've received more clearly than older information. Abby can use this to her advantage by scheduling campaigns at strategic intervals. This ensures that the most valuable information is fresh on employees' minds when they need to make decisions related to the campaign. By doing so, Abby can improve information retention and potentially increase the effectiveness of each campaign.
- 3. Harnessing 'Framing':** The concept of "Framing" suggests that the way information is presented can significantly impact how it is received and acted upon. For example, presenting benefits information in a positive light (i.e., focusing on what employees stand to gain) rather than highlighting potential losses (i.e., what they might miss out on) can elicit more positive responses. Abby should consider this while framing the messages in her campaigns. By emphasizing the benefits and positive outcomes, she can motivate employees to participate and engage more with the campaigns.
- 4. Integrating 'Priming':** The concept of "Priming" involves using cues to subtly guide behavior. For instance, before launching a campaign about a new benefit, Abby could share related content or stories to get employees thinking about the topic. This can create a receptive mindset among employees even before the actual campaign begins. By priming employees in this way, Abby can enhance engagement and increase the likelihood of the campaign's success.

By comprehending and implementing these fundamental principles derived from marketing and behavioral sciences, Abby has the capacity to craft a well-rounded campaign calendar that engages employees and makes sure they are not inundated. At Businessolver, we strive to provide our Customer Experience (CX) clients with valuable support, serving as your strategic partner in assisting you to formulate a comprehensive campaign calendar intricately connected to your HR Benefits strategy.

Choosing the Campaign You Need Now

Assessing your organization's current HR benefits strategy is an extremely important step that involves diving deep into the needs of your workforce. By referring to the employee journey map outlined in Chapter 2, you can identify potential friction points or untapped opportunities that could enhance your employee experience. Additionally, consider the implementation of new benefits to further enrich your employees' journey within the organization. Explore ways to boost the utilization rates of existing benefits that are currently underused, aiming to maximize their value and impact on your employees' well-being. By leveraging these insights, you can fine-tune your HR benefits strategy, develop a targeted campaign, and ensure that your employees receive the best possible support and perks tailored to their needs.

Choose Persona(s)

Personas are fictional characters representing different employee segments. By creating personas, you can tailor campaigns to meet specific group needs, enhancing their impact and appeal. In previous sections, we spoke about targeting personas based on benefits literacy and generational differences.

Consider Abby, the HR Administrator, who identified financial concerns as a top priority through employee feedback. To address this, Abby aims to boost spending account usage and is strategizing how to structure campaigns for this purpose.

Building from Chapter 3, Abby could structure her campaign around the awareness/utilization spectrum by focusing on three distinct groups:

Campaign 1 Cohort Unaware Group: This group includes employees who are not yet aware of the benefits of spending accounts. For this demographic, Abby could create a series of introductory emails or social media posts that provide an overview of what spending accounts are and why they are beneficial. For instance, one post might read, “Did you know a Health Savings Account (HSA) can help cover your medical costs while also providing tax benefits? Stay tuned for more information!”

Campaign 2 Cohort Confused Group: As highlighted in Businessolver’s 2023 Annual Enrollment Survey, many employees are unsure about the differences between HSAs and FSAs. For this group, Abby could create infographics or short explainer videos that clearly delineate the key differences between these accounts. For example, she could develop a side-by-side comparison chart showing how contributions, withdrawals, and roll-overs differ between HSAs and FSAs, along with real-life scenarios to make it more relatable.

Campaign 3 Cohort Utilizers Group: This group consists of employees who are already utilizing spending accounts but are seeking more advanced ways to maximize their benefits. Here, Abby could create content that dives deeper into the nuances of these accounts. This could include webinars or workshops featuring financial advisors who can provide expert tips on how to strategically use HSAs or FSAs. For instance, a webinar titled “Maximizing Your HSA: Advanced Strategies for the Savvy Employee” could be a great resource for this group. By tailoring her campaign to meet the needs of each group, Abby can ensure that all employees, regardless of their current understanding or utilization of spending accounts, receive the information and support they need.

A second approach, building upon the insights from Chapter 4, Abby can craft campaigns to enhance spending account utilization by focusing on generational personas. Here are two illustrative examples:

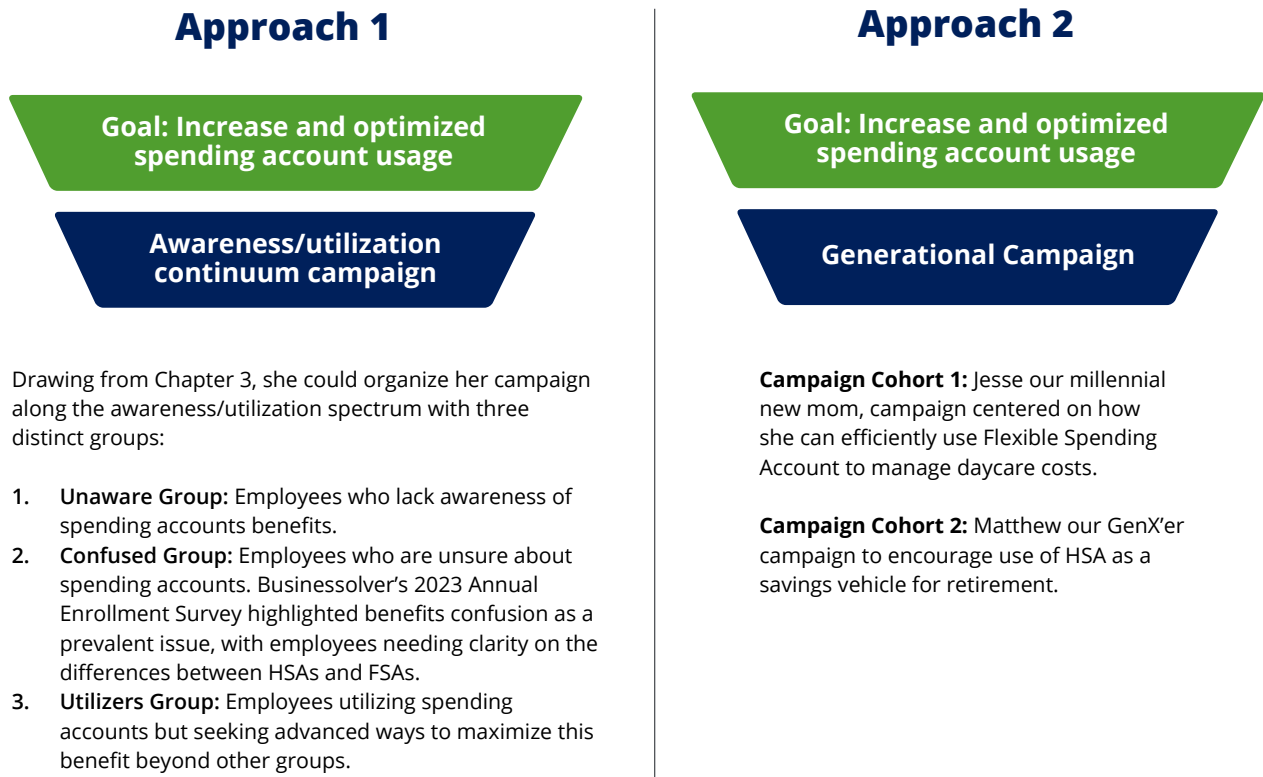
Campaign Cohort 1 - Millennial Parents: This campaign could center around Jesse, a millennial mom who recently welcomed her first child. The campaign might focus on how effectively using a Flexible Spending Account can help manage rising daycare expenses. Content such as an infographic



breaking down how pre-tax dollars from an FSA can be used for eligible dependent care services could resonate with this group. A testimonial from a real-life Millennial parent who successfully used their FSA for childcare costs could also be impactful.

Campaign Cohort 2 - GenX Pre-Retirees: This campaign might feature Matthew, a GenX individual nearing retirement. The key message could be how a Health Savings Account can double as a retirement savings tool. For example, a short video or blog post explaining the triple tax advantages of HSAs and their potential role in supplementing retirement savings could be effective. A case study highlighting a GenX employee who utilized their HSA for medical expenses during retirement could further illustrate this point.

By tailoring content to specific generational personas, Abby can address their unique needs and concerns, making her campaigns more relevant and engaging.



Measure behavior change via Businessolver ROI Dashboards

Figure: Awareness/Utilization Personas vs. Generational Personas



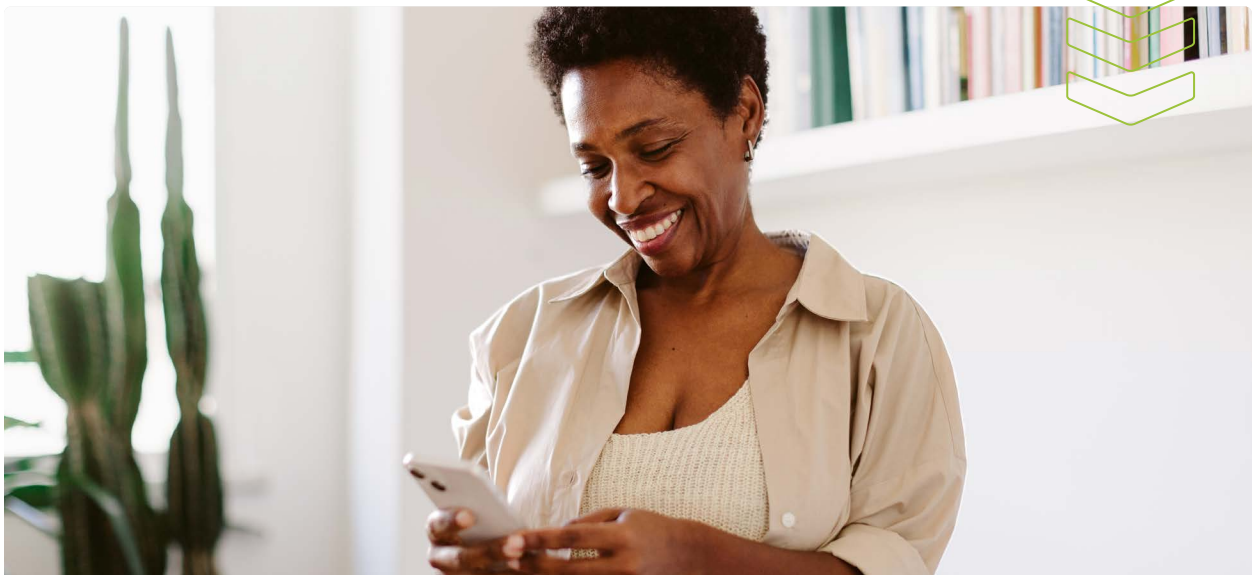
As Abby's organization evolves in promoting positive behavioral changes, she could adopt a more sophisticated hybrid strategy. Abby, the HR Administrator, identified financial concerns as a critical issue based on employee feedback. As a result, she has chosen to improve spending account utilization and is contemplating the structure of her campaigns. Referencing Chapters 3 and 4, Abby could develop a hybrid approach that combines the awareness/utilization spectrum with generational personas.

Campaign 1 - Unaware & Millennial Parents: This campaign targets employees who are unaware of the benefits of spending accounts and aligns with Millennial parents like Jesse. Abby could create introductory content highlighting how a Flexible Spending Account can help manage daycare expenses. An email series or social media posts explaining FSAs with real-life examples of Millennial parents successfully using them for childcare costs could be effective.

Campaign 2 - Confused & GenX Pre-Retirees: As the Businessolver's 2023 Annual Enrollment Survey suggests, confusion between HSAs and FSAs is widespread. Abby could design a campaign for this group, which also includes GenX individuals nearing retirement like Matthew. Infographics or short explainer videos showing the differences between HSAs and FSAs and how they contribute to retirement savings could be beneficial for this cohort.

Campaign 3 - Utilizers Group: This campaign focuses on employees who are already using spending accounts but are looking for advanced ways to maximize their benefits. Abby could offer deeper insights into these accounts through webinars or workshops featuring financial advisors. A webinar like "Maximizing Your HSA: Advanced Strategies for the Savvy Employee" could be an excellent resource for this group.

By integrating these two approaches, Abby can tailor her campaigns to address the unique needs of various groups, ensuring that all employees, regardless of their understanding or utilization of spending accounts, receive the necessary information and support.



Choose Campaign Channels

Once you have campaign type (awareness or utilization), targeted personas, next you can focus on the channels you'll use to distribute your content. This could be via email, social media, intranet, or even physical posters in the workplace.

Building on the personas and campaigns Abby has identified, here's how she could decide on the campaign type (awareness or utilization) and optimal channels for content distribution:

Campaign 1 - Unaware & Millennial Parents: For this awareness campaign, Abby could leverage social media and emails as primary channels. Millennials are known to be tech-savvy and active on social media platforms. An email campaign with infographics explaining the benefits of Flexible Spending Accounts, coupled with engaging social media posts, could effectively reach this group. She could also consider using the company intranet to host a dedicated FAQ section or a webinar explaining FSAs.

Campaign 2 - Confused & GenX Pre-Retirees: For this mixed awareness and utilization campaign, Abby could use a combination of emails, the company intranet, and physical posters. Gen Xers are typically comfortable with email communication and often access company intranet for information. Detailed emails explaining the differences between HSAs and FSAs, infographics on the intranet, and informative posters around the workplace could be a good way to clear confusion.

Campaign 3 - Utilizers Group: For this utilization campaign, Abby might want to tap into more interactive channels. Webinars or workshops can be an excellent way to provide in-depth information and answer specific questions. These sessions could be promoted via email, social media, and the company intranet. For those who can't attend, recording the sessions and making them available on the intranet would ensure everyone gets access to the information.

By matching the campaign type and channels to the needs and habits of each persona, Abby can maximize the reach and impact of her efforts to boost spending account usage.



Plan Execution

Plan Execution is a crucial phase in HR Benefits campaigns. It's the stage where all the preparation and strategizing are put into action. Here's a detailed look at what it entails:

Content Scheduling: With your content created, you need to decide when and where it will be released. Use a content calendar to schedule the release of your emails, social media posts, blog posts, infographics, and other content pieces. Consider the best times to post on each platform for maximum engagement.

Event Planning: If you're hosting webinars or workshops as part of your campaign, start planning these events well in advance. Decide on the date, time, platform, and speakers. Create a registration process and start promoting the event early to get maximum attendance.

Team Coordination: Campaigns often involve multiple teams within an organization. Coordinate with these teams to ensure everyone is aligned and aware of their roles. For example, collaborate with the IT team for any technical support needed for webinars, work with the communications team for distributing emails and social media posts, and liaise with the design team for creating engaging visuals.

Tracking and Monitoring: Set up systems to track the performance of your campaigns. This could involve tracking email open rates, social media engagement, webinar attendance, and more. Regular monitoring lets you adjust if certain elements of your campaign aren't performing as expected.

Feedback Collection: Plan to collect feedback from employees during and after the campaign. Surveys or feedback forms can be used to gauge how well the campaign was received and identify areas of improvement.

Follow-up Strategy: Once your campaign ends, have a follow-up strategy in place. This could include sending thank you emails, sharing a summary of the campaign, or providing additional resources based on the campaign's feedback.

Executing a campaign requires planning and coordination, but with a clear plan in place, you can ensure your campaign runs smoothly and achieves its objectives.

Viewing Your Results Like a Marketer Using Businessolver ROI Dashboards

Measuring the success of your campaign is an important part of the process. Businessolver's ROI dashboards are a valuable tool for this purpose, enabling you to view and analyze your campaign results like a marketer.



Understanding Campaign Performance: The ROI dashboards provide an overview of how well your campaign performed. They can track metrics like email open rates, click-through rates, social media engagement, and webinar attendance. These metrics help you understand what content resonated well with your employees, which channels were the most effective, and what areas need improvement.

Employee Engagement Insights: Beyond the campaign performance, these dashboards can also offer insights into employee engagement. You can see how many employees are actively participating in your campaigns, whether they're interacting with the content, and if they're applying what they've learned. This data will help you understand how engaged your employees are with the benefits programs and where there may be gaps in communication or understanding.

Continuous Improvement: Analyzing the results from the ROI dashboards allows you to continually improve your campaigns. By identifying what worked and what didn't, you can refine your content, adjust your channels, and better tailor your campaigns to meet your employees' needs. This iterative process ensures that your campaigns become increasingly effective over time.

Running campaigns to promote benefits is more than just distributing information. It's about engaging employees, addressing their needs, and promoting a happier, healthier workforce. Using tools like Businessolver's ROI dashboards to measure and improve your campaigns is key to achieving these goals.

Footnotes

1. Bargh, John A., Mark Chen, and Lara Burrows. "Automaticity of social behavior: Direct effects of trait construct and stereotype activation on action." *Journal of Personality and Social Psychology* 71.2 (1996): 230-244. <https://doi.org/10.1037/0022-3514.71.2.230>.
2. Businessolver. (n.d.). Benefits Insights Data Reveals Impact of Personalization on Benefits Engagement. Retrieved February 28, 2024, from <https://businessolver.com/news/businessolver-benefits-insights-data-reveals-impact-of-personalization-on-benefits-engagement/>
3. Circles. (n.d.). The importance of marketing your employee benefits programs. Retrieved February 28, 2024, from <https://www.circles.com/resources/importance-marketing-your-employee-benefits-programs>
4. Cleveland Design. (n.d.). Internal employee benefits campaign. Retrieved February 28, 2024, from <https://clevelanddesign.com/work/internal-employee-benefits-campaign/>
5. Forbes Human Resources Council. (2020, November 19). "14 Ways To Ensure Employees Are Making The Most Of Company Benefits." *Forbes*. Retrieved February 28, 2024, from <https://www.forbes.com/sites/forbeshumanresourcescouncil/2020/11/19/14-ways-to-ensure-employees-are-making-the-most-of-company-benefits/>
6. Glanzer, Murray, and Anita R. Cunitz. "Two storage mechanisms in free recall." *Journal of Verbal Learning and Verbal Behavior* 5.4 (1966): 351-360. [https://doi.org/10.1016/S0022-5371\(66\)80044-0](https://doi.org/10.1016/S0022-5371(66)80044-0).
7. Higgins, E. Tory, William S. Rholes, and Carl R. Jones. "Category accessibility and impression formation." *Journal of Experimental Social Psychology* 13.2 (1977): 141-154. [https://doi.org/10.1016/S0022-1031\(77\)80007-3](https://doi.org/10.1016/S0022-1031(77)80007-3).
8. Iyengar, Sheena S., and Mark R. Lepper. "When choice is demotivating: Can one desire too much of a good thing?" *Journal of Personality and Social Psychology* 79.6 (2000): 995-1006. <https://doi.org/10.1037/0022-3514.79.6.995>.
9. Levin, Irwin P., Sandra L. Schneider, and Gary J. Gaeth. "All frames are not created equal: A typology and critical analysis of framing effects." *Organizational Behavior and Human Decision Processes* 76.2 (1998): 149-188. <https://doi.org/10.1006/obhd.1998.2804>.
10. Murdock, Bennet B. Jr. "The serial position effect of free recall." *Journal of Experimental Psychology* 64.5 (1962): 482-488. <https://doi.org/10.1037/h0045106>.
11. Schwartz, Barry. "The Paradox of Choice: Why More Is Less". Harper Perennial, 2004.
12. Tversky, Amos, and Daniel Kahneman. "The framing of decisions and the psychology of choice." *Science* 211.4481 (1981): 453-458. <https://doi.org/10.1126/science.7455683>.



CHAPTER SIX

Understanding Employee's Needs and Intent



As Abby develops expertise in utilizing marketing campaigns to influence employee behavior, she can enhance her HR Benefit Goals by integrating more behavioral science. This chapter dives into refining Abby's campaigns through a deep understanding of employee needs and intentions. Prioritizing the comprehension of employees' needs and drives is essential within any organization. This involves establishing an employee experience funnel, exploring employee intentions, providing direction for advancement, and customizing content for different employee segments. Understanding their needs and motivations is imperative for shaping behavior, influencing decisions in the present as well as future aspirations.

Understanding Employee Needs

Needs are basic requirements or desires that drive individuals to act to fulfill them. Abraham Maslow's Hierarchy of Needs is a classic theory in psychology that categorizes these into five levels: physiological (basic survival like food and shelter), safety, love/belonging, esteem, and self-actualization. This hierarchy suggests that lower-level needs must be satisfied before individuals can attend to higher-level needs. Needs are intrinsic motivators; they push individuals to seek fulfillment when they are unmet, influencing behavior in profound ways. For instance, the need for security might drive someone to pursue a stable job, while the need for belonging might influence another to seek out social groups or communities.

In Chapter 5, we explored how Abby's needs align with Maslow's hierarchy of needs. At the foundation of the pyramid, Abby focuses on meeting functional needs related to HR efficiency and risk management. This involves prioritizing service delivery, data accuracy, cybersecurity, and other aspects of benefit administration. Moving up the hierarchy, Abby transitions to addressing financial needs such as cost control and trend analysis. To do this, she utilizes tools like decision support, dependent verification, one wallet, plan support, and our advanced ROI dashboards. Finally, at the apex of the pyramid, Abby turns her attention to emotional needs to enhance employee engagement and productivity.

At Businessolver, our extensive research has unveiled a link between employee HR Benefits needs and a structure similar to the seasonal journeys of Abby and her team. Starting at the foundation of the pyramid, employees have practical needs



Leveling the Emotional Playing Field

Cognitive Load Theory, established by educational psychologist John Sweller in the late 1980s, suggests that our working memory can only process a limited amount of new information at a time. When confronted with emotionally charged situations like a challenging medical diagnosis or the mixed emotions of welcoming a new child, individuals may feel their cognitive abilities strained. Emotions, whether from stress or joy, can intensify this pressure, making it challenging to grasp complex information such as HR benefits. Emotional reactions can deplete cognitive resources, reducing the capacity for understanding intricate details. Thus, the capacity to manage emotions is pressing for individuals to make well-informed decisions and fully utilize their benefits. However, regulating emotions tied to significant life events is inherently demanding. The objective is to assist individuals during emotionally taxing periods by presenting information in more accessible formats, providing emotional support, and potentially offering decision-making tools to simplify choices. This strategy alleviates cognitive strain, enhances decision-making, and renders sentiment analysis at Businessolver truly actionable. By simplifying communications for employees during emotionally vulnerable moments, we can offer better support when they need it most.

to simplify benefits awareness and usage, save money, and tailor their benefits to their unique requirements. Progressing upward, emotional needs emerge; employees aim to reduce anxiety, enhance wellness, and seek guidance on their benefits journey. The subsequent level entails the necessity for personalization; acknowledging that HR Benefits are diverse, our advanced AI technology at Businessolver aids Abby's team in grasping their benefits based on their distinct backgrounds, empowering them to optimize their benefits. Lastly, reflecting Abby's hierarchy of needs, the peak of the employee pyramid concentrates on fostering enduring positive behavioral changes that equip employees to maximize their benefits and nurture a customized wellness strategy.

Our UX program vision's goal of promoting positive behavior change in using HR Benefits has taken an important step forward. By helping our users make the most out of their benefits, we can create long-lasting and beneficial changes for everyone involved.

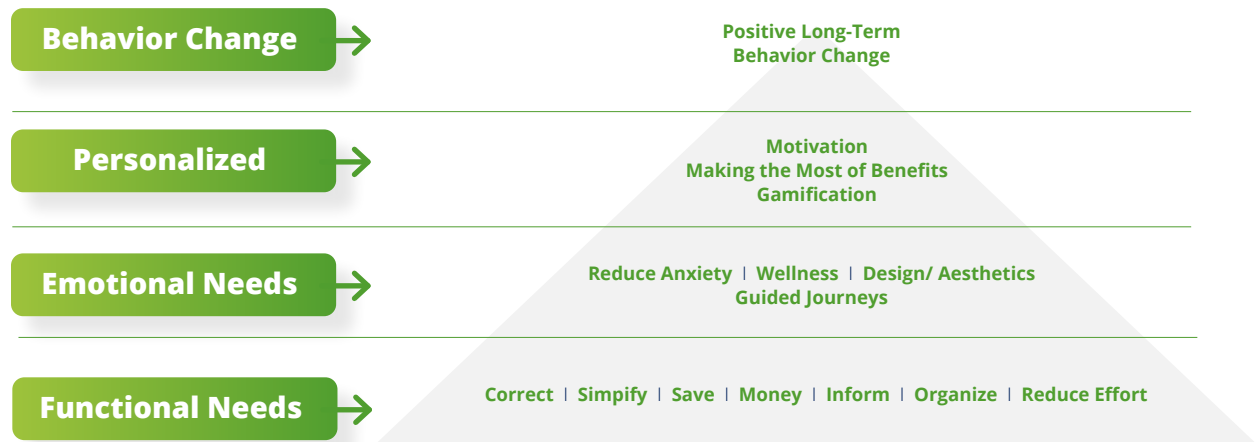


Figure: Employee Benefits Hierarchy of Needs

Exploring Employee Intent

Intent refers to the purpose or reason behind an action—the cognitive decision-making process that precedes behavior. It encompasses the motivations, goals, and objectives that shape how we plan and execute actions. Understanding intent is crucial because it provides insight into the deliberate choices individuals make. In the realm of behavioral science, theories such as the Theory of Planned Behavior highlight the role of intent in predicting how likely a person is to engage in a particular behavior. Intent is shaped by attitudes toward behavior, subjective norms, and perceived behavioral control. For example, if a person intends to become healthier, this intent—shaped by personal motivation, social pressures, and perceived difficulty—will guide their actions, such as dieting or exercising.

Understanding the intent behind your employees' actions and decisions can provide valuable insights into their needs and motivations. This could involve conducting surveys or interviews, observing behavior, or analyzing data from performance reviews or other sources. For example, if an employee consistently chooses to work late, it might indicate a need for more flexible working hours, or it could suggest they're struggling with their workload. By exploring employee intent, you can address underlying issues and better support your employees.

Abby, the HR Admin, can leverage the complex interplay between needs and intent to drive employee behaviors towards meeting organizational goals through carefully designed employee campaigns. By understanding that underlying needs often shape intentions, Abby can create initiatives that resonate deeply with employees' personal and professional aspirations, influencing their behavior in a constructive manner.

- 1. Personalized Communication:** Abby can craft communication strategies tailored to her workforce's diverse needs. For instance, understanding that certain employees seek esteem and personal growth, she can promote awareness of the Employee Assistance Program and mental health initiatives. Collaborating with the training team, she can also align these employees with professional development opportunities.
- 2. Utilizing Predictive Analytics for Behavior Modification:** By examining patterns in employee behavior and feedback, Abby can anticipate areas requiring interventions to align actions with organizational objectives. For instance, identifying a decrease in benefits utilization could prompt targeted awareness campaigns.
- 3. Crafting Interventions to Address Needs:** By comprehending employees' underlying intentions, Abby can create interventions that meet these needs and steer employees toward desired behaviors. For instance, recognizing the need for security, she can develop campaigns focusing on wellness and job stability to reassure employees, fostering loyalty and productivity.
- 4. Establishing Feedback Mechanisms for Ongoing Enhancement:** Implementing regular feedback channels enables Abby to assess the effectiveness of addressing employees' needs and intentions. Surveys, focus groups, and individual meetings offer valuable insights into the resonance of current initiatives and necessary adjustments to ensure alignment with individual and organizational goals. At Businessolver, our platform features these feedback loops for Abby to monitor results through our ROI Dashboards.

By applying an understanding of the dynamic relationship between needs and intent, Abby can craft employee campaigns that resonate on a personal level and also motivate constructive behavior changes. These changes, in turn, can drive the organization closer to achieving its goals, demonstrating the profound impact of addressing human needs and intentions within the workplace.

Providing a Path to the Next Step

After pinpointing the specific needs and motivations of your employees, it's necessary to lay down a concrete pathway for them to advance. This could entail the establishment of specialized training sessions, provision of mentorship opportunities, or the delineation of a transparent career development framework. In doing so, you not only cater to their immediate requirements but also demonstrate your vested interest in their long-term development and prosperity within the company. A prime illustration of facilitating this progression is seen in Businessolver's Activation Paths. These innovative pathways are crafted to heighten employee engagement by offering personalized prompts and reminders to leverage non-electable benefits fully. Serving as a key component of an organization's benefits strategy, these paths illuminate the spectrum of available benefits and chart an intuitive, straightforward course for employees to activate and optimize these offerings.

Activation Paths contribute significantly to creating a productive and well-balanced life. They play a pivotal role in driving engagement with solutions that address overall wellbeing. Introduced as a facet of Businessolver's suite of Personalized Navigation solutions, which encompasses Claims-Based Personalization, Activation Paths enhance the HR benefits experience. They aim to elevate employee engagement by delivering tailored guidance for the activation and practical utilization of their benefits. Businessolver's Activation Paths exemplify a forward-thinking approach in HR management, designed to empower employees through personalized support in navigating and making the most of their benefits portfolio.

Renovating HR Benefits Strategy: The Data-Driven Journey for Abby

Imagine Abby's journey in enhancing her HR Benefits strategy as a comprehensive renovation project of a cherished home. Just as a house needs a solid foundation, clear architectural plans, and the right tools and materials to transform it into a dream home, Abby's approach to revamping her HR benefits needs a strong base of understanding, strategic planning, and the proper application of technology and data analytics. The renovation begins with laying a sturdy foundation built on the insights gathered from user experience (UX) and marketing principles. This is similar to understanding the land and the structure of the existing building. Abby has effectively mapped out the employee experience, identifying key touchpoints that influence their interaction with benefits programs. This step ensures that any additions or changes are built on a thorough understanding of employee needs and behaviors.

As an architect considers the lifestyle and preferences of the homeowners, Abby has segmented her employees into personas. This allows her to tailor her benefits communication and programs to match the specific needs and behaviors of diverse groups. Creating persona-specific campaigns is like choosing the right interior design that resonates with the inhabitants' tastes and requirements, making the benefits package more appealing and accessible. Incorporating behavioral science into refining these campaigns is like selecting materials that look good but are durable and sustainable.

It's about understanding the underlying psychology that drives employee engagement with benefits programs and using that knowledge to encourage positive behaviors. This step ensures that the benefits strategy is not just attractive but also effective in motivating desired actions.

Turning Your HR Benefits Home into a Smart Home

As we put the finishing touches on our renovation, we're transforming it into a smart home. Collaborating with data scientists and AI developers, we aim to create a home equipped with smart technology that intuitively meets the residents' needs, enhancing their everyday life. By utilizing advanced analytics and AI, Abby can foresee upcoming trends and employee requirements, enabling her to proactively provide competitive and relevant benefits. This innovative strategy ensures that the HR benefits approach remains flexible and enduring, much like a well-refurbished home that adapts to the changing demands of its inhabitants.



Footnotes

1. Maslow, A. H. (1943). "A theory of human motivation." *Psychological Review*, 50(4), 370–396.
2. "Emotional Well-Being, Cognitive Load and Academic Attainment." Retrieved from <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC10702652/#:~:text=The%20relationship%20between%20emotions%20and,during%20a%20specific%20learning%20exercise.>



CHAPTER SEVEN

Transforming Abby's HR Benefits Strategy into a Smart Home



Starting the smart home journey aligns with Abby's strategic move to establish a robust data infrastructure for her HR Benefits strategy. Gathering precise employee data is not just a routine task but the foundation for making informed, analytics-driven decisions in the future. Just like setting up basic smart devices, introducing analytics tools is like shining a light on the intricate web of benefits engagement trends. Progressing to the realm of predictive analytics and harnessing the power of machine learning models serves to elevate Abby's strategic approach, culminating in the creation of a seamlessly integrated ecosystem for benefits customization. With the integration of real-time data flow and advanced analytics capabilities, benefits can now be personalized automatically, ensuring timely delivery to employees. Emphasizing continuous refinement as the cornerstone, Abby's strategy is geared towards adapting to evolving data sources and meeting the dynamic expectations of the workforce, enhancing the value of HR Benefits for both the organization and its employees. Let's dive deeper into how Abby can embark on this transformative journey:

Establish a Foundation of Data Literacy

The foundational step in enhancing the HR team's capabilities is establishing a robust basis in data literacy. This comprehensive process entails mastering the core principles of data management, ensuring the accuracy of data collection procedures, and refining the expertise required to extract insightful conclusions from the data at hand. As highlighted in Deloitte Insights' IMPACT 2018 report, equipping HR professionals with fundamental data literacy skills is paramount in empowering them to formulate precise inquiries and render decisions grounded in data-driven insights.

In my previous publication entitled "Bridging the Gap," I underscored the significance of shared mental models within an organizational setting, illustrating how they can function as effective shortcuts that expedite teams' progression towards more advanced cognitive levels and task execution proficiency. When applied to the realm of data literacy, the establishment of a clear and well-structured data dictionary emerges as a pivotal resource. This resource can assist Abby and her team in unraveling intricate data complexities and streamlining the integration of AI technologies by simplifying machine learning processes. By adopting this dual approach—strengthening both the human and technological facets of the HR function—a foundation is laid for the development of a sophisticated and data-centric HR strategy that resonates with the evolving landscape of human resource management.

Implement Advanced Data Collection Methods

To elevate her approach and progress up the data maturity scale, Abby needs to adopt more sophisticated data collection techniques outside of conventional use of surveys and feedback forms. This involves a strategic shift towards utilizing advanced analytics tools capable of monitoring employee interactions with benefits platforms. Insights from Perceptyx in 2023 highlight the importance of employee listening as a critical component of understanding workforce dynamics. By employing these innovative tools, Abby can gain a more nuanced comprehension of employee engagement with benefits programs.

These advanced data collection methods enable the identification of specific patterns and preferences in how employees utilize benefits, offering a granular view that traditional methods may overlook. For instance, analytics can reveal which benefits are most accessed during certain times of the year, or identify trends in benefits utilization across different demographics within the organization. This data can be instrumental in tailoring benefits programs more closely to employee needs, enhancing satisfaction and retention. By analyzing the frequency and way employees interact with benefits platforms, Abby can also gauge the effectiveness of communication strategies around benefits. Are employees fully aware of all the benefits available to them? Do certain benefits go underutilized due to lack of awareness or perceived complexity? Advanced analytics can provide answers to these questions, enabling Abby to refine her communication approach and ensure that employees are fully informed and able to make the most of their benefits.

To answer these questions and use advanced methods for identifying patterns and preferences in how employees utilize benefits, Abby would need access to a variety of data sources. Here's a breakdown of potential data sources that could provide the necessary insights:

Benefits Platform Usage Data: This includes logs and analytics from the benefits management system or platform, detailing which benefits employees are accessing, when they access them, and how often. It can show trends over time and highlight the most popular benefits.

Employee Demographic Data: Information such as age, gender, department, job role, and tenure within the company can help identify trends in benefits utilization across different demographics. This data is typically stored in the organization's human resources information system (HRIS).

Employee Feedback and Survey Data: Surveys, feedback forms, and even focus group discussions can provide qualitative insights into employee awareness and perceptions of the benefits program. This data can highlight areas where communication might be lacking or where benefits are perceived as too complex.

Benefits Enrollment and Claims Data: Detailed records of benefits enrollment choices and claims made by employees can offer insights into actual benefits usage, not just intent or interest. This data can help identify underutilized benefits and potential reasons why.

Campaign Engagement Data: Metrics from emails, internal newsletters, or intranet posts related to benefits (open rates, click-through rates, page views) can indicate how effectively information about benefits is being communicated to employees.

External Benchmarking Data: Industry benchmarks or studies on benefits utilization and trends can provide context and help assess how the organization's benefits utilization compares with similar companies or industry averages.

Call Center Reason Codes & Topic Modeling: Records of questions or issues raised by employees regarding benefits can highlight areas of confusion or lack of awareness. Analyzing the frequency and nature of these queries can inform more targeted communication strategies.

By integrating and analyzing data from these sources, Abby can gain a comprehensive understanding of how benefits are utilized and perceived within her organization. This will enable her to identify specific patterns, preferences, and areas for improvement, thereby tailoring the benefits program more closely to employee needs and enhancing overall satisfaction and retention.

Integrate Predictive Analytics

As her organization advances further along the maturity continuum, Abby should explore the integration of predictive analytics. This approach involves using historical data to forecast future trends, such as predicting which benefits will be most valued by employees in the coming years. The use of predictive analytics can greatly enhance the personalization and effectiveness of HR benefits strategies.

Insights from Businessolver have highlighted the significant impact of personalized decision support in benefits programs, emphasizing its role in enhancing employee engagement. Businessolver's Benefits Insights Data reveals the substantial influence of personalization on benefits engagement, as outlined in their analysis. This study stresses the importance of tailored communication and assistance throughout the benefits journey, asserting that a generic approach is insufficient to meet the diverse needs of today's workforce. Businessolver's emphasis on ROI-driven solutions bridges the gap between finance, benefits, and HR departments, providing a unified approach to streamline HR and benefits operations while maximizing ROI. This alignment is compelling in developing a benefits program that is highly effective in improving employee satisfaction and retention.

The implementation of ROI dashboards, emphasized by Businessolver, provides a robust tool for monitoring and analyzing benefits engagement and utilization. These dashboards offer real-time insights into employees' interactions with benefits platforms, empowering Abby and her team to make informed decisions that elevate the overall benefits experience. By integrating these advanced analytics and personalized decision support systems, Abby can significantly enhance her benefits management approach. Utilizing these tools, Abby can deepen her comprehension of employee preferences and behaviors, enabling her to customize benefits offerings more efficiently. This boosts employee engagement and positions the organization to proactively respond to evolving trends and requirements.

This approach, supported by data-driven insights and personalization, is necessary for sustaining a competitive advantage. It ensures that the benefits program remains appealing and pertinent, attracting and retaining top talent in a fiercely competitive market. The incorporation of ROI dashboards and customized decision support embodies a forward-thinking approach that aligns with the evolving expectations of today's workforce, setting the stage for a more engaged and content employee cohort.

Leverage AI and Machine Learning for Deep Insights

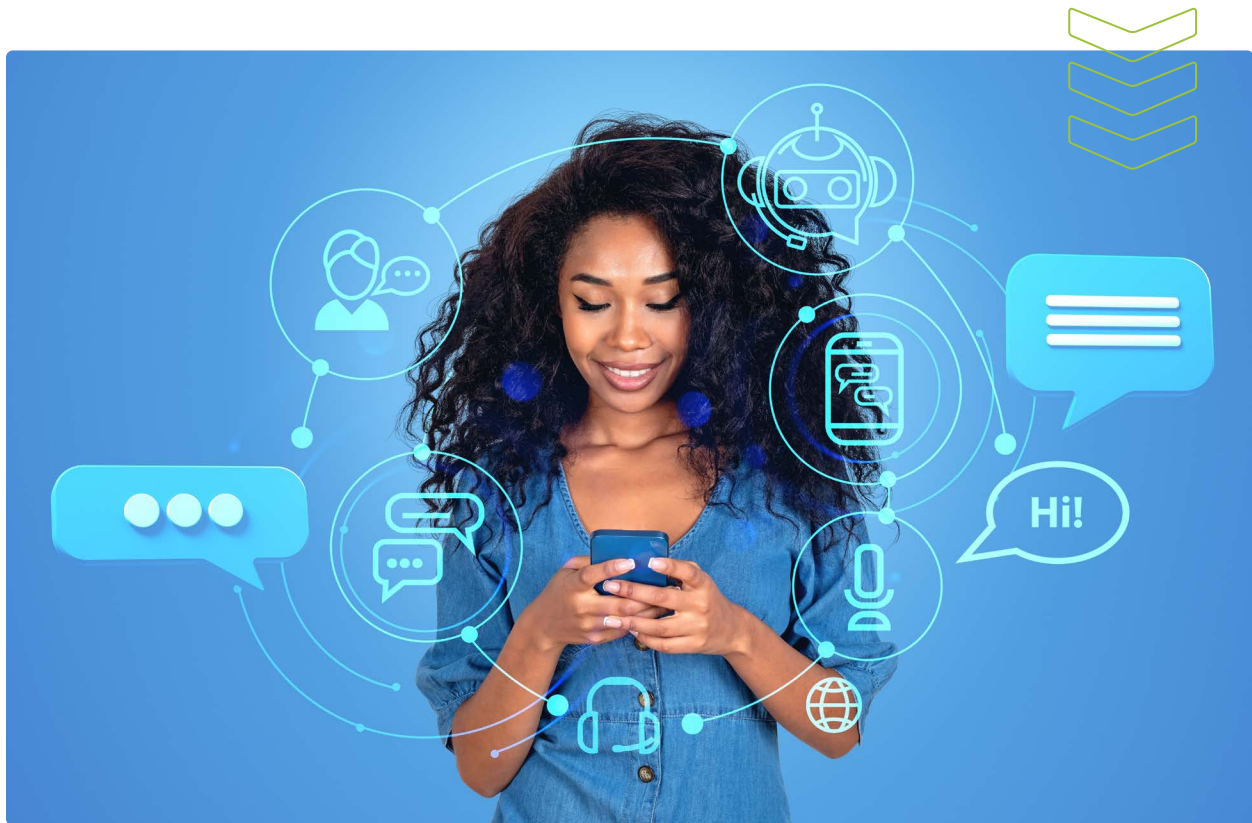
In the modern digital era, the intersection of big data and human resources (HR) analytics has become table stakes for organizations aiming to optimize their workforce strategies. As outlined in various studies available through Emerald Insight, HR analytics is not just a trend but a fundamental shift in how HR functions leverage data to make informed decisions. This shift towards data-driven decision-making in HR is underscored by the growing reliance on human resource analytics (HRA), which encompasses a broad variety of applications from talent acquisition and retention to benefits administration and employee engagement.

The role of HR analytics has been notably highlighted in times of crisis, as seen in an analysis of LinkedIn data. The analysis points to the emerging need for HR professionals to possess a blend of analytical, technical, and business skills, underscoring the multifaceted nature of HR analytical roles. This evolution reflects the broader transformation within HR departments, from traditional administrative functions to strategic entities empowered by data insights. As HR analytics continues to mature, questions arise regarding its future direction, practical implementation, and impact on organizational performance. A study on the ROI-based review of HR analytics provides practical tools for HR professionals, emphasizing the tangible value derived from various HR analytics projects. This approach helps demystify the process of adopting HR analytics, making it more accessible to organizations regardless of their size or industry.

The link between HR analytics and organizational performance has been explored, revealing how data-driven HR practices can lead to superior outcomes. This includes enhancing employee satisfaction, improving retention rates, and boosting organizational performance. However, the adoption of HR analytics is not without challenges. Key factors and barriers to its implementation have been identified, including technological, cultural, and skill-related hurdles. At the pinnacle of the data and analytics maturity model, leveraging artificial intelligence (AI) and machine learning algorithms becomes necessary for gaining deep insights into employee behavior and preferences. The integration of AI in HR analytics allows for the analysis of vast datasets, identifying patterns that would be impossible for humans to discern manually. This level of insight and personalization in benefits design and delivery is transformative, enabling organizations to tailor their offerings more closely to employee needs.

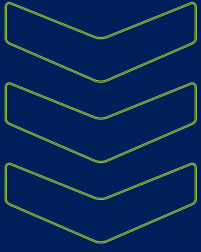
In this context, platforms like Businessolver's Sofia represent the forefront of AI-driven HR technology. Sofia utilizes AI to provide a highly personalized and interactive experience for employees engaging with their benefits platform. By analyzing individual employee data and interactions, Sofia can offer tailored recommendations, answer questions in real-time, and guide employees through the benefits selection process with precision. This level of customization ensures that employees are aware of the benefits available to them and understand how to utilize these benefits effectively, addressing issues of underutilization and complexity. For Abby, leveraging a platform like Sofia could significantly enhance her ability to engage employees with their benefits. By providing a more intuitive and personalized interaction with the benefits platform, Abby can ensure that employees are fully informed and making the most of their benefits. This not only improves satisfaction and retention but also aligns with the strategic goals of using HR analytics to drive better organizational outcomes.

In conclusion, Abby's transformation of the HR Benefits strategy into a smart home exemplifies the importance of integrating advanced data analytics and machine learning to cultivate a dynamic, personalized benefits ecosystem. By establishing a solid foundation in data literacy and embracing sophisticated data management and predictive analytics techniques, Abby has not only streamlined the HR Benefits process but also significantly enhanced the employee experience through tailored benefits programs. The strategic incorporation of AI and machine learning technologies has facilitated deeper insights into employee needs and preferences, enabling the development of more effective and satisfying benefits packages. The emphasis on data-driven decision-making underscores the evolving role of HR professionals, who are now equipped with the analytical and technical skills necessary to navigate the complexities of the modern workforce landscape. This shift towards a more analytical and personalized approach in HR benefits strategy positions organizations to better meet the needs of their employees and strengthens their competitive edge in attracting and retaining top talent. Through this innovative journey, Abby demonstrates the transformative power of leveraging data and technology to revolutionize HR practices, setting a benchmark for future advancements in the field.

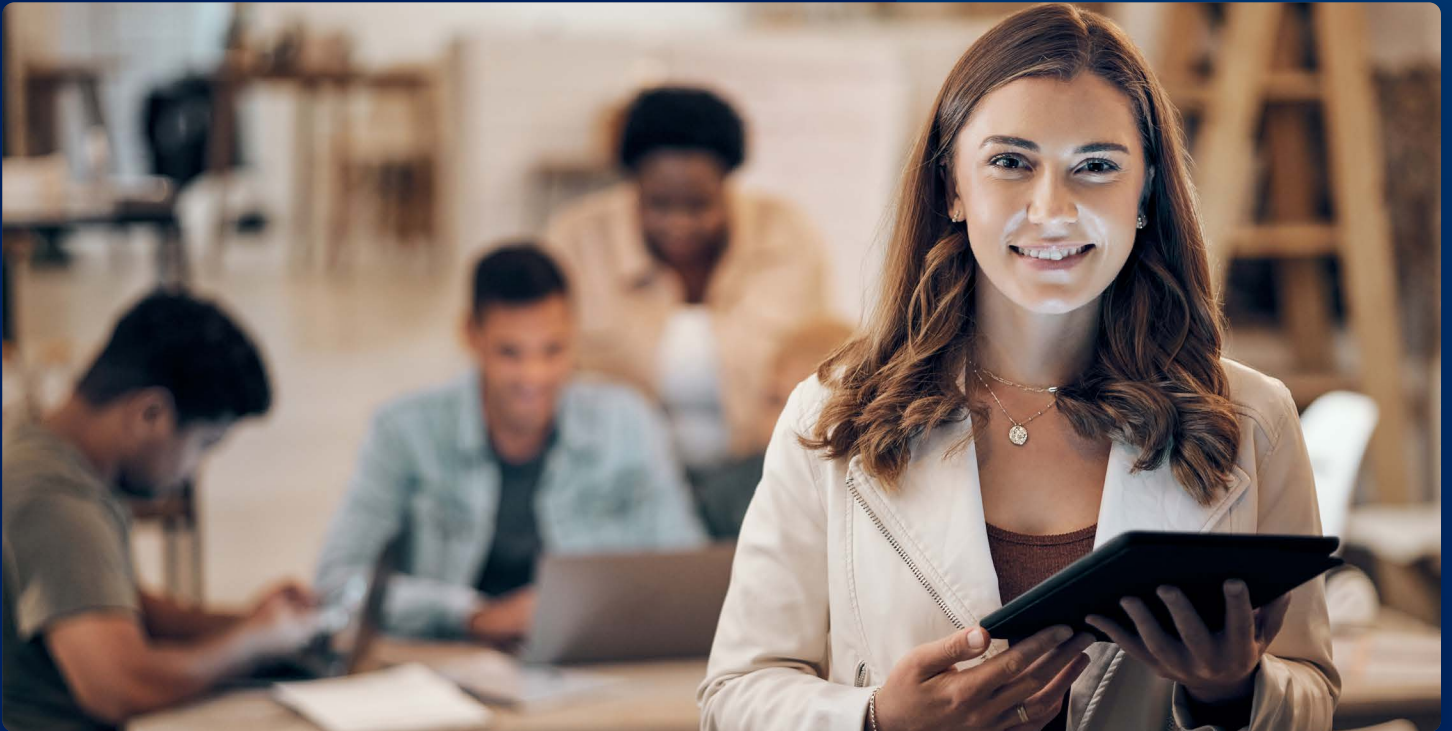


Footnotes

1. "Tackling the HR digitalization challenge: key factors and barriers to HR analytics adoption." Available at: Emerald Insight.
2. "The impact of digital skills, human centric culture, employee wellbeing, and HR analytics on talent management in the Sultanate of Oman: A quantitative study." Available at: Academia.edu.



Bringing it All Home



Abby, in her role as an HR administrator, stands at the forefront of cultivating a 'benefits home' for her employees, a concept that deeply reinforces the social bond between her workforce and the organization. This intricate process involves meticulously planning benefit strategies, seamlessly integrating user-friendly technology to facilitate interactions with AI, and ensuring that insurance benefits comply with current regulations. With the shifting dynamics of employer-employee relationships in the U.S., there is a growing emphasis on supporting mental health, offering personalized benefits packages, and providing flexible working conditions. Abby's task involves merging principles of UX design and marketing within an interdisciplinary HR framework to elevate the employee experience and attract exemplary talent.

By analyzing demographic shifts, industry trends, and customizing benefits to cater to a variety of needs, Abby can significantly enhance job satisfaction and cultivate loyalty among her employees. Utilizing data analytics and targeted initiatives, she places a strong focus on employee engagement and tailoring benefits to meet the unique needs of different segments within her workforce. This approach not only improves job satisfaction but also enriches the overall employee experience.

At the heart of organizational functionality, data analytics provides indispensable insights that guide decision-making and foster a culture of continuous improvement. Through the application of double-loop learning, Abby can adjust strategies based on feedback, ensuring the benefits strategy remains dynamic and responsive to employee needs. The management of employee benefits spans several key phases, including research, analysis, and feedback collection, all aimed at continuously refining benefits offerings and the enrollment process.

By developing specific employee personas, Abby can customize benefits to address the diverse needs of her workforce, thereby boosting engagement through personalized communication and educational resources. This personalized approach ensures that benefits align closely with the priorities of different employee groups, enhancing their connection to the organization.

Creating engaging content for benefit campaigns requires setting clear objectives that align with the overall strategic goals, such as increasing awareness about certain benefits among employees. By segmenting the workforce based on their level of awareness, Abby can develop customized communications that resonate more effectively with each group.

Understanding employee needs through established frameworks like Maslow's Hierarchy of Needs is crucial for designing benefits that truly motivate and engage employees. This knowledge allows Abby to create benefits and campaigns that not only meet basic necessities but also encourage positive behaviors and engagement by addressing higher-level aspirations.

Ultimately, Abby's responsibility extends beyond merely managing a portfolio of benefits. She plays a required role in nurturing a connected, engaged workplace community by thoughtfully addressing the varied needs and ambitions of her employees. This reinforces the essential social contract between the workforce and the organization. Through strategic planning and personalized communication, Abby can distinguish her company as an employer of choice, attract and retain top talent, and foster a positive, fulfilling work environment.

Technology, Powered by *People*

♥ TECH WITH *heart*



Market-Leading Benefits Technology + Innovative, High-Touch Services

businessolver.com

