



**Name of your organization:** Blanchard

**How do you use the People Insights Platform today?**

Blanchard uses the Dialogue platform with the crowdsourced feature to activate our employee listening strategy and generate actionable items that are meaningful to our colleagues and make a real difference in their employee experience.

**Please share your EX Impact story. Detail your challenge, solution, and impact.**

Our internal B.Heard employee voice process relies on the Perceptyx Dialogue platform to use measurement data, both quantitative and qualitative, to support Blanchard's engagement, growth, retention, and the employee experience.

Prior to using Dialogue, Blanchard relied only on our annual employee satisfaction survey. 2021 was the tenth year Blanchard had used the assessment, so there was a plethora of historical data from which to glean information. The problem with those previous 10 years of data was that we had few successful actions to show, or improvements to the survey scores to report. Our numbers had remained relatively flat. In 2021 we began augmenting the annual survey with additional crowdsourced surveys throughout the year.

Our executive leaders took the tactic to examine some of the low work-passion scores that correlated to having the biggest impact on employee retention. We then focused on inviting all Blanchard colleagues to be part of the conversation. At Blanchard, we focus on the Human Experience, and wanted to ensure that everyone was part of informing that process. By combining the quantitative data from the annual survey with the qualitative data of the crowdsourced surveys, the team was able to implement actions that made a difference. We moved the needle in key areas of growth, feedback, fairness, and satisfaction.

One of the first metrics we tackled was Feedback. These scores were low, and it's easy to understand that the shift to remote work and the rapid rate of change was negatively impacting the scores. The crowdsourced survey indicated people were intimidated by having potentially challenging conversations. In some cases, they indicated that they didn't feel that they had a strong enough relationship with others to give and receive appropriate feedback. To improve these areas, the People and Culture team offered training courses to all levels of the staff on Conversational Capacity and Building Trust. The courses were rolled out in a self-paced, online format. This gave people the flexibility to fit learning into their busy schedules. These two courses helped our colleagues build their skillsets and their mindsets around being able to give and receive feedback. This solved two big problems: 1) people were given training to help them improve their communication skills and 2) they were able to develop stronger, more trusting relationships with the people to whom they were providing constructive feedback or redirection.

The second metric we tackled was Growth. These scores had been historically low at Blanchard. This was a good news/bad news situation. The good news is that we have always had very low turnover rates. The bad news is that low turnover had led to fewer opportunities to be promoted from within. When we crowdsourced our colleagues about their personal experiences with growth at Blanchard, it was clear that people loved working here and wanted the



opportunity to contribute more! We started building career development questions into our bi-annual performance alignment conversations. We also offered learning “Empower Hours.” During this twice-monthly protected time, colleagues are encouraged to learn a new skill, work on their professional goals, and explore internal career development options. The People and Culture team was determined to change the narrative that “there was no room to grow” at Blanchard. To do so, they enlisted the help of one of our Founding Associates, Dr. Margie Blanchard. Margie has spent more than 40 years in the leadership development world and has a passion for helping people grow and progress in their professional lives. In 2021, they developed a Career Discovery course for Blanchard colleagues. The course was offered to everyone in quarterly cohorts starting in 2022. It is currently one of the most requested and attended trainings we offer internally!

The third low-scoring metric we looked at improving was Procedural Fairness. This essentially means “all rules are applied to all people equally.” With the shift to remote work and the rapid pace of the business, it was understandable that some people might be feeling siloed or unduly put upon. This assumption was proven correct through the crowdsourced survey results. People indicated that they felt compensation and job descriptions were not being addressed as roles shifted, and that more could be done to improve feelings of fairness around seniority regarding growth and career development. To help solve some of these issues, the team enlisted a third-party company to do a full compensation and job description audit. But more importantly, we re-committed to investing in our colleagues. The team partnered with our Coaching Services team to offer one-on-one coaching and training to any colleague who wanted to work on career growth and development. Coaching consists of a three-month minimum coaching engagement, with an option to extend, with the coach and coachee ideally meeting every other week.

### **Which business outcome measures did your organization use to determine the impact on employees?**

- Improved intent to stay with the company, decreased employee turnover

### **Do you have any additional KPIs/Metrics to demonstrate your impact on EX?**

After many years of relatively flat numbers on our annual survey, we were able to see statistically significant improvements to the metrics we focused on. The annual survey uses a summated rating, where each metric has three questions, and each question has six possible scores (1 to 6). The three scores per metric are averaged for each respondent, and then the average of all respondents is calculated for each metric. The maximum summated score for each metric is 18.

Between 2020 and 2022, Feedback increased from 11.76 to 12.20, Growth increased from 10.48 to 11.45, Procedural Fairness increased from 11.07 to 11.33, and Intent to Remain increased from 12.26 to 12.97. These small increases indicate a statistically significant positive difference.

In subsequent crowdsourced surveys on Feedback, between 2021 and 2022, we captured more significant and specific improvements. For example, in 2021, the statement “I feel comfortable providing feedback to members of my team”—a critical challenge discovered using



crowdsourcing surveys—stood at 75% positive. By 2022, that number increased to 82%. “I receive coaching and feedback from my manager on a regular basis” rose from 69% to 75%; “I receive appropriate feedback on my job performance to know how well I am doing” went from 71% to 83%; and “The feedback I receive allows me to make improvements in my job” increased from 75% to 81%. Although there is always more progress to be made, it was clear that we were breaking down silos, creating better relationships across the organization, and re-engaging our colleagues.

After we measured Growth and expanded career growth conversations and trainings, we saw an increase in internal promotions. In 2021, our average rate of internal promotion was 7%. In 2022, that increased to almost 9%. For 2023, we are over an 11% rate of internal promotions. Since the start of Dr. Margie Blanchard’s Career Discovery course in 2022, we have hosted 6 cohorts with a total of 54 participants. Remarkably, 13 of those participants have been promoted into new roles, which is a 24% success rate! Not only are we re-engaging our colleagues, but we were also retaining them and leveraging their knowledge to better serve our changing business and our clients.

In 2021, qualitative evidence from our crowdsourced survey on Procedural Fairness showed that burnout was real. Across the board, Blanchard colleagues felt overworked and that, even though they had benefits like unlimited paid time off, they didn’t feel supported in being away from work. Thanks to this information, the leadership team added Wellness Days to the calendar starting in 2022. These companywide paid days off are designed to support everyone’s work-life balance and wellbeing. In 2022, we offered four total, with one company closure per quarter. These were so well received that for 2023, we staggered Wellness Days for our global regions. By staggering and combining them with other holidays, we were able to offer a total of eight days of paid, companywide, global office closures. This was a welcomed relief to all our colleagues and remains a high point on all surveys about our benefit offerings. In fact, leadership added two bonus “Summer+Wellness Days” to the 204 calendar, so with those days and the staggered holiday/wellness day combos, we have 11 days of paid, companywide, global office closures!

The B.Heard initiative is working. By analyzing survey data and listening to our employees’ input, we are making measurable changes and a positive impact. By offering a variety of learning and development options and taking actionable steps, Blanchard colleagues are getting what they needed to support their work lives and their personal lives. In 2021, our turnover was at 10.78%. In 2023, we were at 7.28%. Between 2021 and 2022, through the crowdsourced surveys, we also saw big increases in overall engagement scores. “My work energizes me,” a statement tied to the challenge for which Wellness Days were a response, grew from 72% to 79%. “I am enthusiastic about working here” rose from 78% to a staggering 94%. And, perhaps most impressive, was the change to our overall satisfaction score on our annual work passion survey. In 2020, before the B.Heard listening strategy was implemented using the Dialogue platform, we had an 88% agreement score. At the end of 2022, that number increased to a staggering 96% overall satisfaction.