**Creating a Culture** That **Customers and Advisors Love**

**Webinar**
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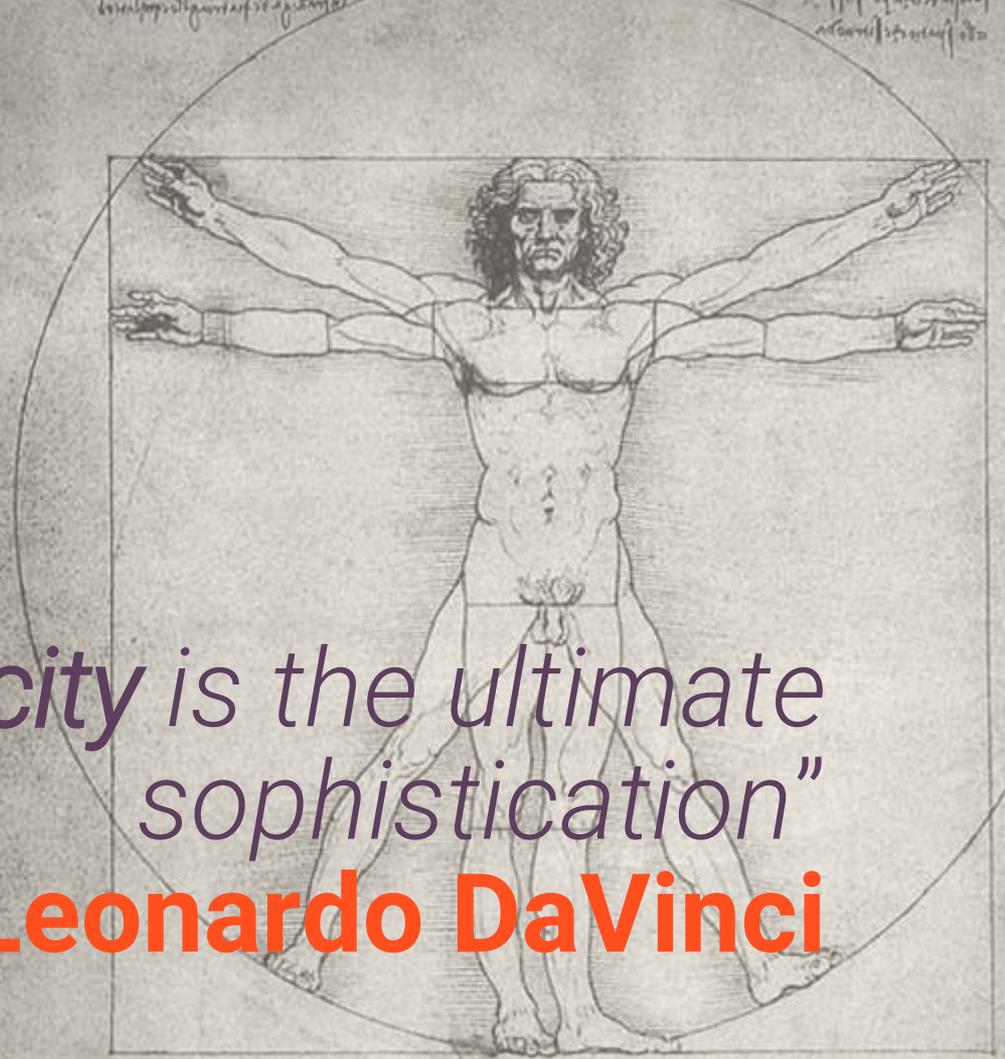
"*Simplicity* *is the ultimate sophistication*"
**Leonardo DaVinci**

# Experience as a Service℠



Engagement
Marketing  Sales  Service

Artificial Intelligence
Conversation  Automation  Optimization

Customer and Employee Data
Historical data  3rd party data  Behavioral data

Personalized
Empathy  Trust  Loyalty
Experiences
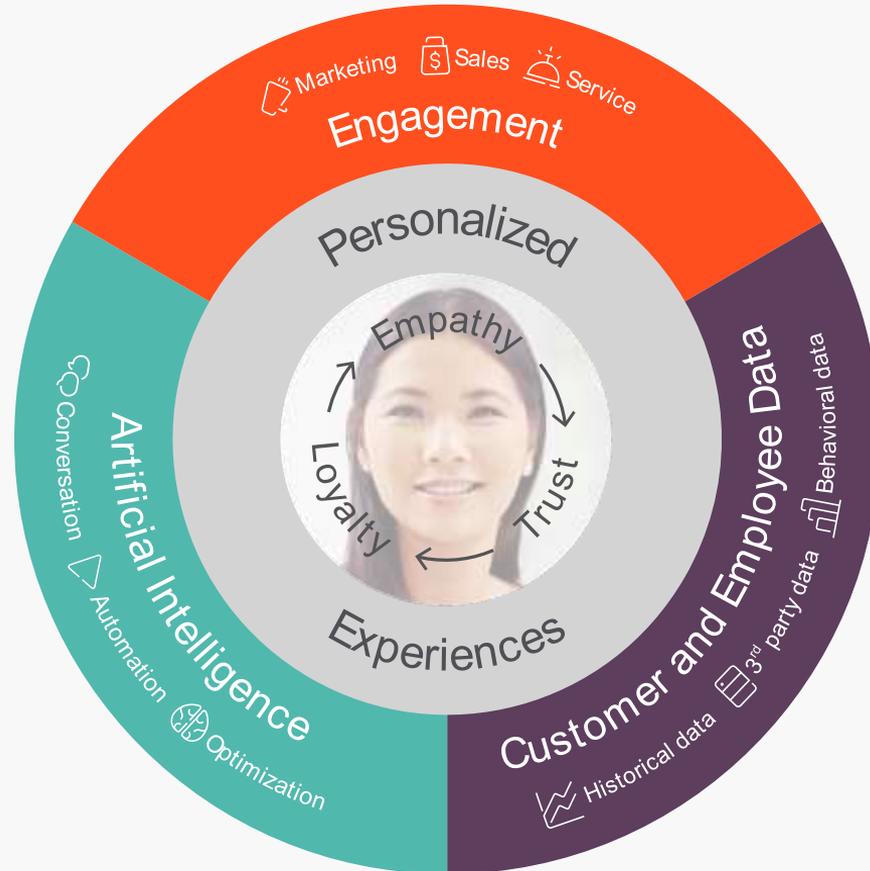
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# 71%

of executives say that employee engagement is critical to their company's success.

FastTrack360

# 69%

of employees say they'd work harder if they were better appreciated

HubSpot

# Why does employee engagement matter?

More than 62% of Employees are not committed to their organizations

Source: AON Hewitt - 2016

The cost of disengaged employee translates to:

- 2X satisfaction decrease
- 4X more quality defects
- 2X in employee turnover

Source: AON Hewitt

# WFM → WFO → WEM

- ## What is the difference?

  The short answer is that WEM focuses on generating a positive employee experience, whereas WFO focuses on making sure customer interactions are as valuable and efficient as possible.

  However, studies have shown that positive employee experiences directly relate to the quality of customer experience provided; which is why it's fair to say that WFO falls under the umbrella of WEM

Onboarding & Recruitment

Voice of the Employee (VoE)

Levels of Satisfaction

Performance Tracking

Metrics & Recognition

Compliance

Gamification

Forecasting

Attendance

Training Management

Scheduling

Time Management

Workforce Management          Workforce Optimization          Workforce Engagement
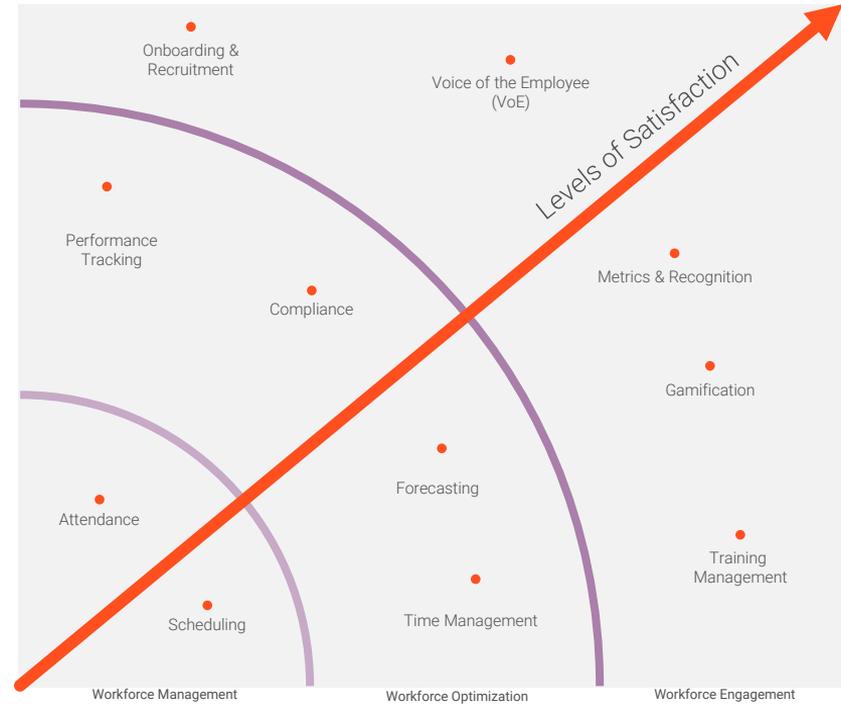
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# Old Way: silo approach to employee engagement

## Plans and Goals
Identify and define metrics and goals by teams and employees

## Reports
Performance data against propose goals

## Alignment
Plan adjustment, align on targets, milestones and implementation

## Optimization

## Corrective actions
Implement process and corrective actions to address the challenges

## Reviews
Evaluate progress, identify challenges and behavior rewards

# VS.

# New Way: Integrated work, AI powered
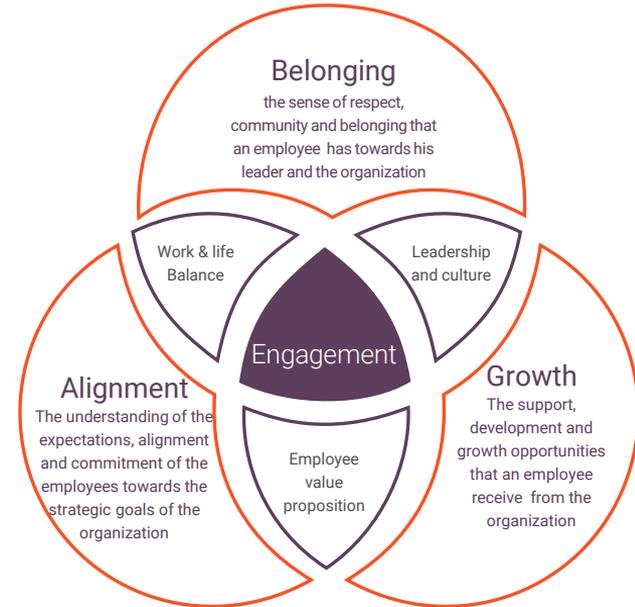
## Belonging
the sense of respect, community and belonging that an employee has towards his leader and the organization

Work & life Balance

Leadership and culture

## Alignment
The understanding of the expectations, alignment and commitment of the employees towards the strategic goals of the organization

## Engagement

Employee value proposition

## Growth
The support, development and growth opportunities that an employee receive from the organization

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# What's AI got to do with it?

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- Sales
- Service

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- Automation
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- 3rd party data
- Behavioral data

Personalized Experiences

Empathy · Trust · Loyalty
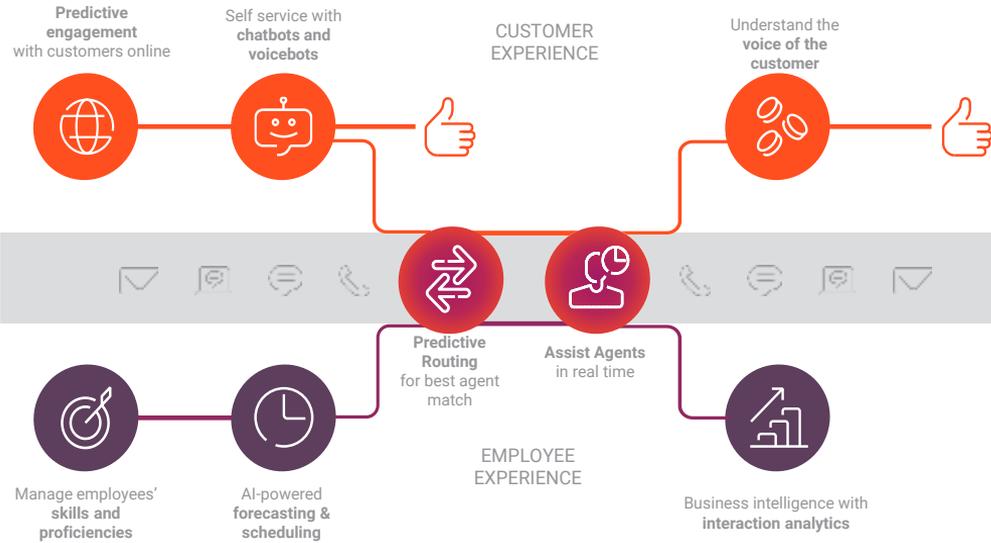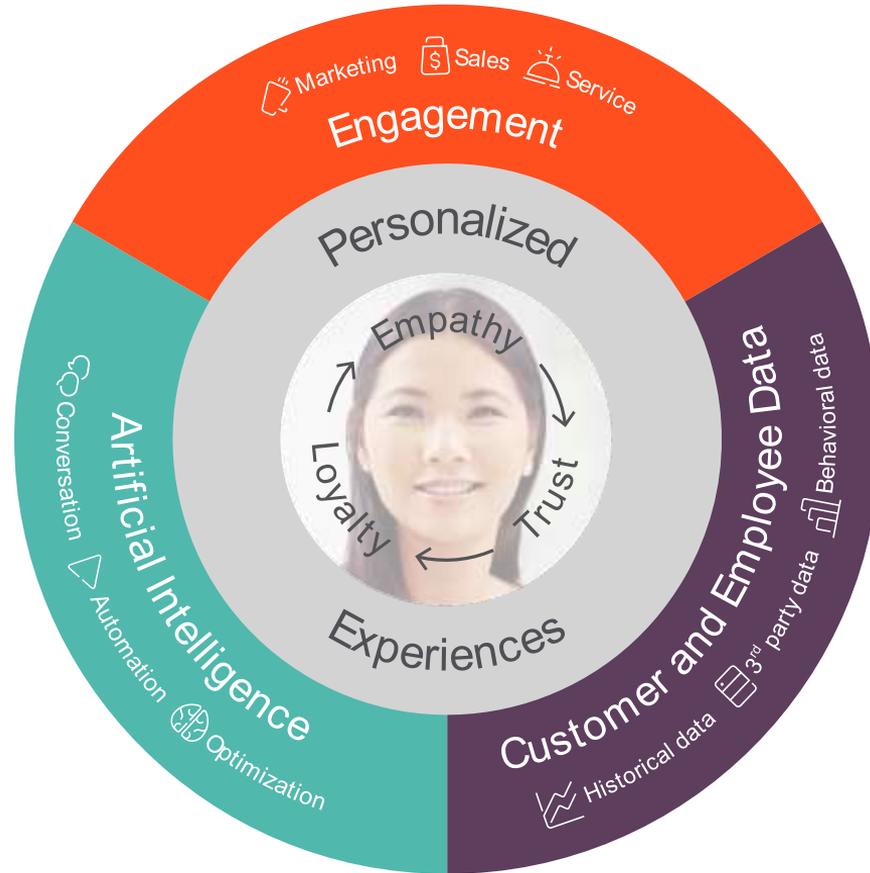
# Thanks

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