



Experience
2020 Global Culture Report
O.C. Tanner Institute

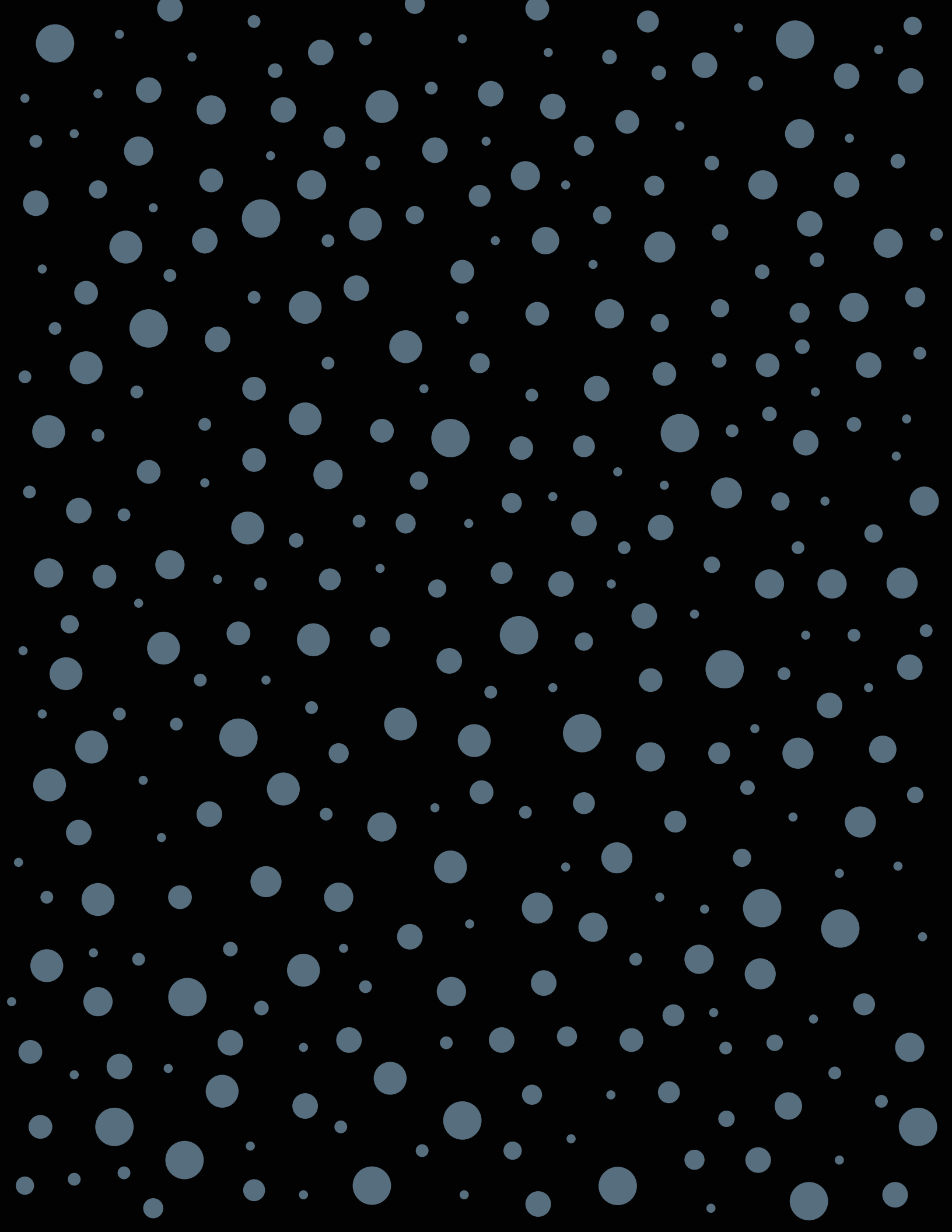


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In 2018/2019, we saw organizations make significant investments in workplace culture. Our research demonstrates that these deliberate culture strategies and efforts are making a difference across the board. However, the journey to thriving workplaces is just beginning. In spite of some positive changes in corporate culture, we have uncovered a new wave of challenges: a growing frustration with conventional workplace practices, an alarming increase in burnout, and a rejection of traditional leadership practices and philosophies. Organizations need to break out of the employee lifecycle mentality to focus on the everyday micro-experiences that, for employees, define life at work.

Last year, the O.C. Tanner Institute released our inaugural annual global culture report. Our objective was to provide a different type of research report that reflects both employees' and leaders' perspectives for a more holistic view of workplace culture. Our 2020 report continues this work, with an emphasis on how everyday employee experiences influence, and are influenced by, thriving workplace cultures.

We assert that a new approach to employee experience and workplace culture is needed. Why? Many organizations have depended almost exclusively on the “employee lifecycle” model to design better employee experiences. There is little doubt that this model has proven helpful. It provides a time-based framework for thinking about the different stages of an employee’s tenure. However, we found that the framework does not adequately reflect the employee point-of-view. Indeed, it barely scratches the surface of the broad range of day-to-day experiences that employees encounter at work. To create a better overall employee experience, organizations need to evolve beyond the limitations of the lifecycle view, and focus on high-impact, daily micro-experiences instead. These experiences connect employees to the cultural norms, values, and behaviors that add up to a thriving workplace culture. That culture, in turn, creates a strong, sustained influence on engagement levels, productivity, innovation, and many other core metrics of success.

This report draws upon a research study of more than 20,000 employees and leaders across the world who shared their experiences with the sometimes helpful, sometimes harmful aspects of corporate culture where they work. We learned that without deliberate and intentional efforts, there’s a real risk of continued increases in burnout, disengaged employees, and declining business results, particularly as we move into a softer economy. We’ve focused on sharing fresh insights, suggesting modifications to existing efforts, and offering a few possibilities for new initiatives. These will help you be more effective in your culture strategy, development, and design.

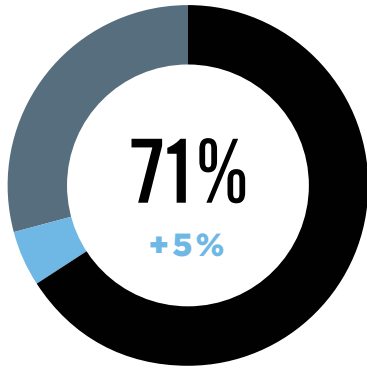
It's a story of progress and potential. As organizations become more intentional about improving workplace culture, identifying their target states, and beginning to address deficiencies and problems, every Talent Magnet index (as defined in last year's report) has increased. However, we still see evidence that culture initiatives are often siloed, and strategies are fragmented, leading to wide disparities in the employee experience. Organizations appear to be missing out on the potential synergies of addressing culture holistically. To continue substantial culture gains, organizations need to pursue a cohesive strategy that deliberately connects culture efforts with employee experience initiatives.

The modern workplace and the experiences and relationships employees have with their organizations are constantly evolving. Employees, especially younger ones, have higher expectations that will put pressure on organizations in 2020. Companies that can keep up with the rapid changes in the workforce will flourish, and companies that cannot will lose their best people, their competitive edge, and ultimately, their customers. The old mindsets and practices for leading and listening to employees are beginning to crumble and fade.

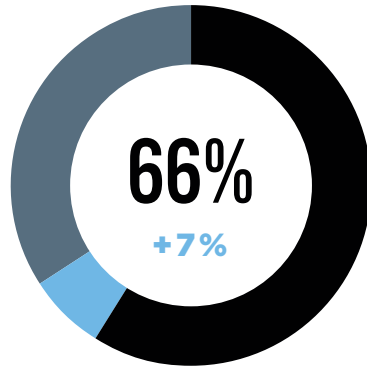
Leaders are fast waking up to the crucial role of workplace culture in organizational success. Great workplace cultures generate an energy that fuels their people to innovate, to wow their customers, to draw in the best people, and to outperform their competitors in virtually every aspect of business results. Still, organizations around the world struggle to foster workplace cultures that employees can connect to; ones that inspire passion and loyalty. However, this past year, propelled by the intentional efforts of leaders to improve workplace culture, employees are reporting that progress is being felt and experienced. Like a giant flywheel, it appears that the momentum is building. A renewed effort to improve workplace culture and enable employees to thrive at work is leading to broad-based improvements in culture. We believe it's just the beginning.

ORGANIZATIONS SHOW PROMISING IMPROVEMENTS

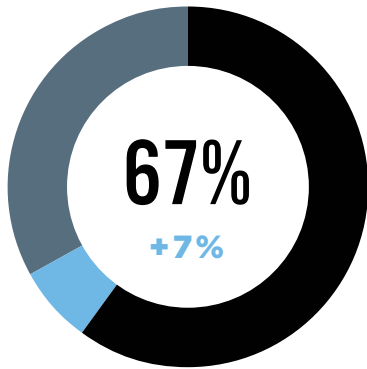
Last year's Global Culture Report identified six core elements of workplace culture that are crucial to an employee's decision to join, engage with, and remain at any place of work. We call them Talent Magnets, because of their power to attract and connect people to their teams and organizations. They are shown here with their corresponding improvement over last year's study.



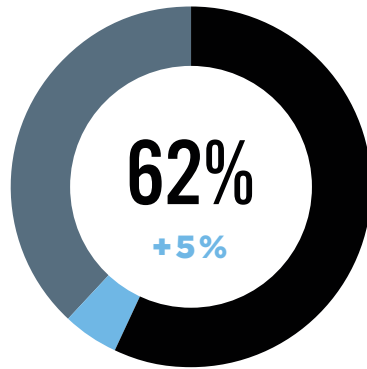
EMPLOYEE SENSE OF PURPOSE



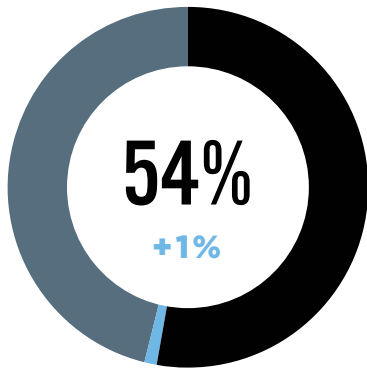
EMPLOYEE SENSE OF OPPORTUNITY



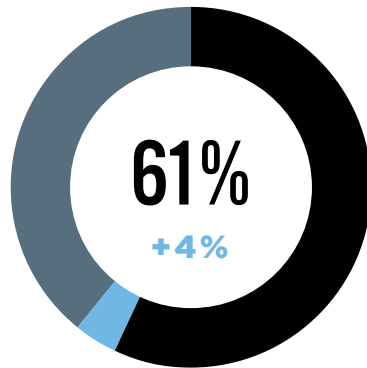
EMPLOYEE SENSE OF SUCCESS



EMPLOYEE SENSE OF APPRECIATION



EMPLOYEE SENSE OF WELLBEING



EMPLOYEE SENSE OF LEADERSHIP



Figure 1. THE TALENT MAGNETS™
Six essential elements that define a thriving workplace culture.

1. Purpose

Purpose is your organization's reason for being. It's the difference you make in the world. It's what would go missing if your organization ceased to exist.

In order to feel passionate about their work, employees need to feel connected to your company's purpose and understand how their role and the work they do contribute to it. Companies must clearly articulate their purpose and create experiences that inspire each employee to pursue it with all their heart, mind, and soul.

2. Opportunity

Talented, productive employees crave opportunity. So create an environment that helps them develop new skills, do work they are proud of, feel challenged, have a voice, and grow.

Opportunity is about more than promotions and pay increases. It's about empowering employees to make decisions, offering them a seat at the table, and including them in special projects where they can make new connections and expand their skills. Opportunity is enabling employees to make a difference and to experience personal and professional growth.

3. Success

Everyone wants to play on a winning team. So create a culture of success. Help employees feel the thrill of accomplishment, innovation, and personal victory.

Employees yearn to contribute in meaningful ways. Success needs to be experienced at the individual, team, and company level. It should be nurtured, articulated, and celebrated. To foster success, leaders must break down barriers to greatness, encourage risk-taking, and publicly recognize great work.

4. Appreciation

In order to thrive, people need to feel valued for their contributions and appreciated for their unique talents and points of view.

Employees lose heart when they are not appreciated. They need to know their extra efforts and above-and-beyond contributions are noticed and valued. To be effective, this needs to be done in a timely, personal, and meaningful way.

5. Wellbeing

Organizations need to care about more than just the physical health of employees. They need to care about the employee as a whole; their physical, emotional, social, and financial wellness. Wellbeing is ensuring employees can be their healthiest, most authentic selves at work.

Wellbeing is escalating in importance in today's workplace because more and more employees are feeling stressed, disconnected, and lonely at work. Leaders need to create an environment of inclusivity, work/life integration, and connection.

6. Leadership

Employees need leaders who act as mentors and coaches, who inspire and facilitate rather than micromanage, and who foster a sense of collaboration and support.

Leaders cultivate a sense of purpose, opportunity, success, appreciation, and wellbeing in their people. The best leaders are more than “bosses” who tell their employees what to do. They inspire, mentor, create shared purpose, and empower their employees to do great things.

Companies with thriving workplace cultures perform well across each of the six Talent Magnets. They also see higher levels of employee engagement, higher Net Promoter Scores (NPS, which indicate how likely employees are to recommend their organization as a place to work), better revenue growth, more innovation, lower turnover, and fewer layoffs.¹

Employee engagement increased six points to 72%, and employee NPS moved from a negative 8% to a positive 5%.



**AVERAGE ENGAGEMENT SCORE IS UP
6% FROM THE PREVIOUS YEAR**

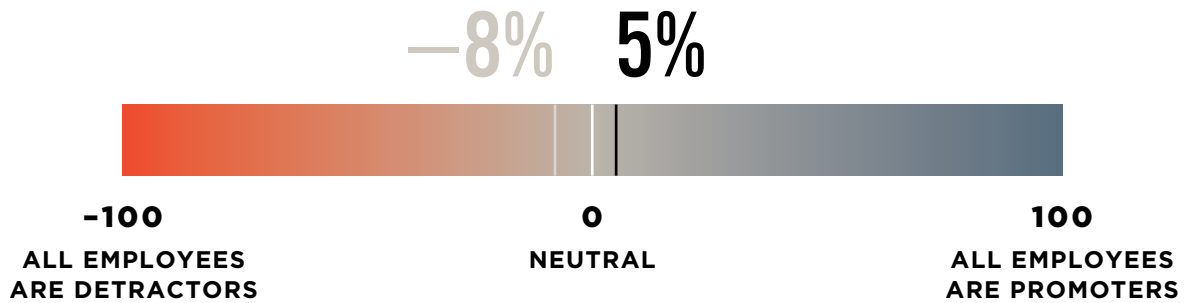


Figure 2. EMPLOYEE NET PROMOTER SCORE
 How likely are you to recommend the company you work for to others as a great place to work?

It is encouraging to see that companies around the world are making progress, and that their concerted efforts are starting to pay dividends. While there may be some effect from external factors on these scores (good economic conditions, low unemployment, etc.), we see evidence that culture is gaining momentum. Purpose, in particular, increased significantly. Our research demonstrates that organizations are placing an increased focus on becoming more purpose-driven, creating and intentionally communicating a meaningful corporate reason for being. With coordinated efforts driven by senior leaders, HR, internal communication teams, and marketing departments, more employees feel connected to their organization’s purpose.

Our previous research found that the Talent Magnets are statistically interconnected. Improve one magnet, and there will be improvements in the others. This makes logical sense. A meaningful purpose, for example, creates a feeling of opportunity, which increases the chance for success. It also positively impacts employees’ perceptions of leadership, and helps them feel an elevated sense of appreciation and wellbeing. So improvement in purpose alone can strengthen your entire culture across the board. The same is true for every magnet.

These small but concentrated efforts may take time, but they are still having an impact. It’s clear the dial is moving.

BURNOUT IS STILL CAUSING MANY EMPLOYEES TO LEAVE

While workplace cultures are getting better around the globe, there is still a lot of room for improvement. The likelihood to leave an organization for a similar role, pay, and benefits at another company actually increased to 59% from 55% last year. While companies are improving when it comes to their workplace cultures, those cultures are not yet strong enough to cause employees to stay.

59%

If offered a job at a different company with a similar role, pay, and benefits TODAY, 59% of employees would accept the job.

2020 GLOBAL CULTURE STUDY, O.C. TANNER INSTITUTE

Just as concerning, employees are feeling more burned out than ever before. Employee burnout, a common occurrence in the healthcare industry, is now showing up in other industries. The World Health Organization officially classified burnout as a legitimate syndrome related to “chronic workplace stress that has not been successfully managed.”² Meanwhile, Oregon became the first state in the U.S. to give high school students five mental health days per year to mitigate burnout.³ Our research found that 79% of employees are experiencing some level of burnout at work. Organizations need to start looking at their culture to mitigate sources of chronic workplace stress.

High burnout shows that while workplace culture is improving, we have not yet reached the tipping point. There is still the lack of a coherent, integrated culture strategy to create breakthrough change in organizations, and address retention and burnout issues.

OUTDATED APPROACHES TO CULTURE DEVELOPMENT JUST DON'T WORK

The old ways that organizations define themselves, their leadership philosophies, work expectations, communications, and employee development are fading in effectiveness. In many cases, they are being outright rejected by incoming generations of employees. Workplace culture norms that worked for so long in the past are no longer relevant with Millennials and Gen Z-ers and do not work in the increasingly mobile, modern workplace.

Things like siloed, title-based decision-making processes, traditional leadership management practices, annual performance reviews, team structures, old technology tools, and even the 9-5 workday are no longer meaningful to today's workforce. Employees desire more autonomy, more transparent communication, more mentoring, and more flexibility in how and where they work. It is imperative that companies listen, learn, and adapt to new ways of leading their people to actively shape their culture moving forward.

Redefining and reinventing how organizations interact with their people is a big task. How do we create workplace cultures that help employees successfully handle workplace stress, want to stay, and thrive at work?

It all hinges on rethinking the employee experience.

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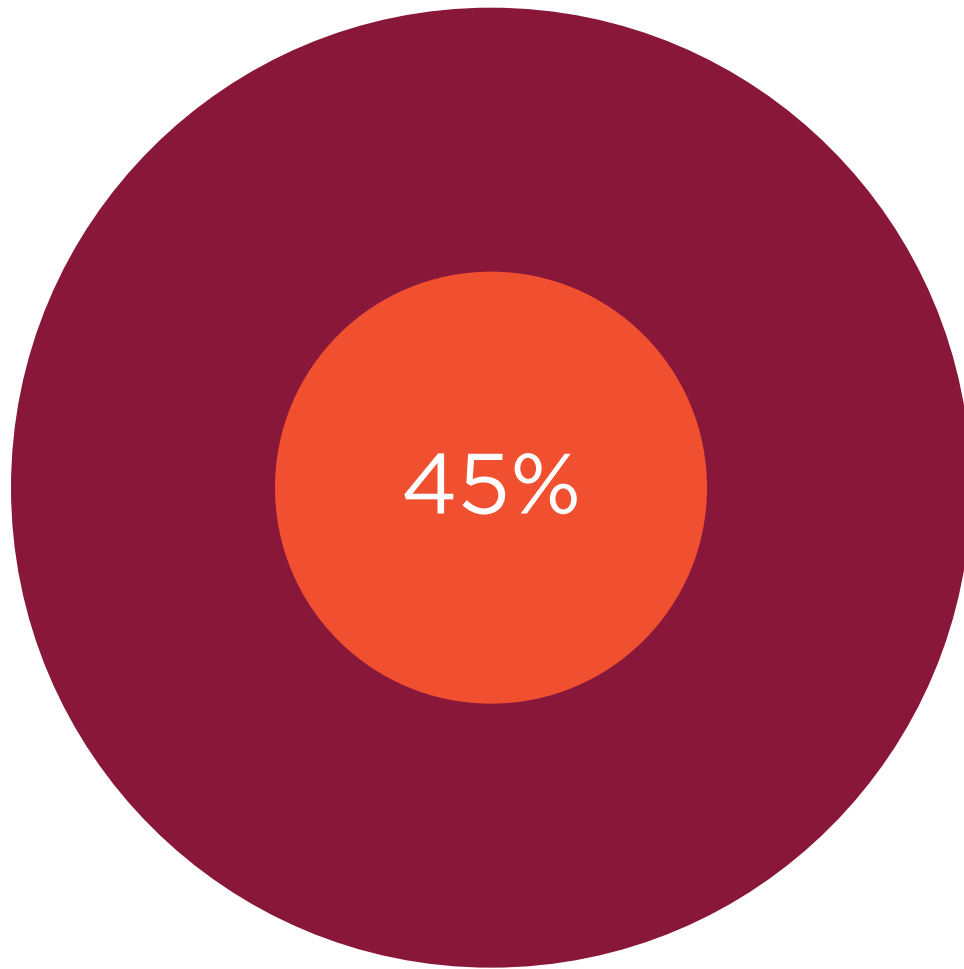
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Experiences



Rethink what you know. Organizations need to get hyper-focused on day-to-day employee experiences.





**ONLY 45% OF EMPLOYEES HAD A PEAK
MOMENT IN THE PAST MONTH**

Executives are becoming more and more aware of the importance of the employee experience. But they struggle to define it. Most HR leaders have looked to the employee lifecycle model to shape their employee experience strategy. While this model provides a helpful framework, it represents more of a corporate, rather than an employee, point-of-view. Therefore, many leaders miss what matters most to employees: the personal, everyday, career-defining, micro-experiences that shape life at work. Organizations that improve these day-to-day work experiences create a more engaging overall employee experience. They help people thrive by creating a culture where clear expectations, behaviors, and celebrations inspire organizational success.

What is employee experience?

Over the past few years, the phrase “employee experience” has become associated with the “employee lifecycle,” which effectively takes a time-based view of significant career events from pre-hire to post-retire (or separation). Companies have concentrated their employee experience efforts on these major milestones in an employee’s time with the company: when they are hired, through the onboarding experience, during training and development, while they are trying to engage and retain their people, and when employees leave. Most organizations implement company-wide programs around these stages to reach employees and try to provide an improved experience as they progress through each milestone.

Employee experience author and futurist Jacob Morgan¹ outlines the evolution of the employee experience. What started as a focus on utility—efforts to provide employees with the minimum of what was needed to work (desk, chair, phone, computer)—then shifted to what would drive employees to work harder, faster, and be more productive (employee optimization, repeatable processes). This evolved into employee engagement and how to make employees happy (annual survey, mission statements, perks). Now the employee experience encompasses things that make employees want to come to work, with an emphasis on culture, workspace, and an intentionally designed experience.

Despite company efforts, we found that only 66% of employees feel the employee experience matters at their organization. Deloitte reports 84% of employees said the employee experience was an important issue to improve, with almost 33% calling it one of their organization’s top three urgent issues.² This is for good reason. Nearly 1 in 5 employees, especially Millennials, left their jobs in 2017 due to a poor employee experience.³

Why are companies struggling to provide great experiences for their people?

Most organizations are missing a crucial piece of the employee experience. Companies create programs and experiences to talk at their people. Equating employee lifecycle with employee experience often leads to a “one-size-fits-all” approach when it comes to interacting with employees. What organizations overlook is the wide variety of everyday human interactions and events, trials and triumphs, adventures and misadventures that define life at work. This is the real employee experience. But rather than empathize with it, many organizations operate as though it doesn’t even exist.

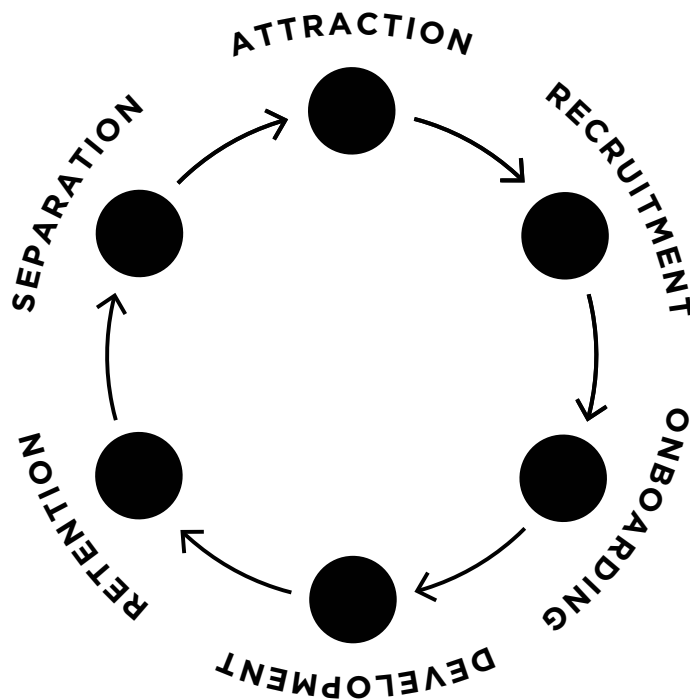


Figure 3. THE EMPLOYEE LIFECYCLE
The traditional corporate view of employee experience involves six distinct career stages known as the employee lifecycle.

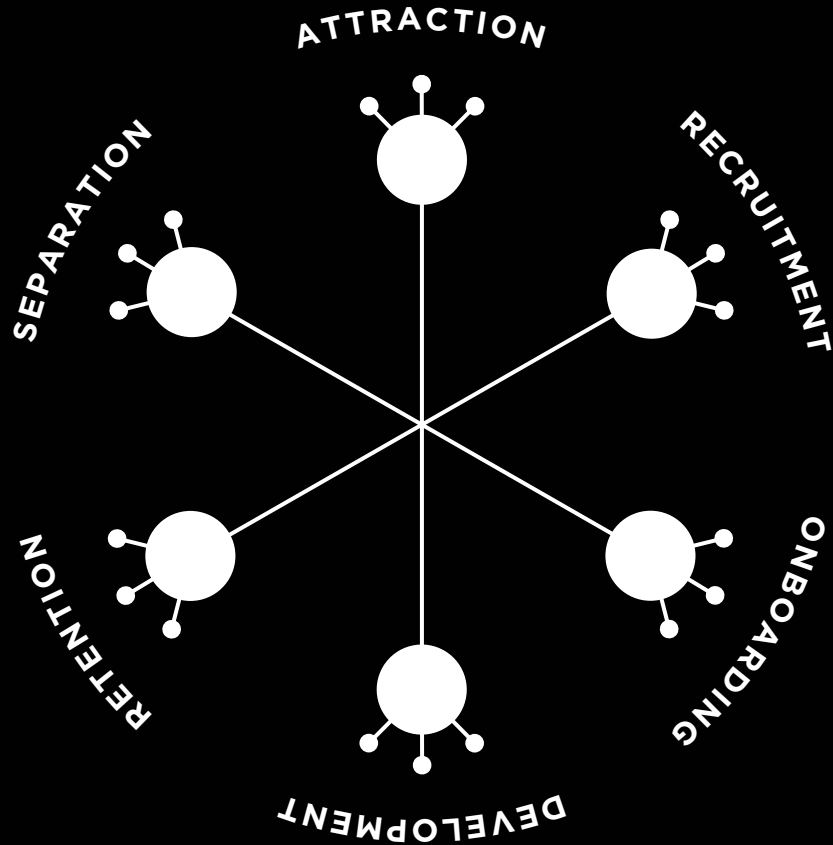


Figure 4. EMPLOYEE EXPERIENCES
To foster a positive work environment, HR leaders design programs to deliver employee experiences around each lifecycle stage.

THE EMPLOYEE IN FOCUS

Employees view the employee experience differently than organizations

When employees think of the employee experience, they aren't thinking of company-wide programs and perks or benefits. They also are not thinking about where they are in the employee lifecycle or journey. That's the corporate point-of-view. Employees are thinking of their personal experiences—a collection of thousands of interactions they have in an organization, both positive and negative. Every conversation they've had, email read, poster seen, appreciation received (or not received); how they are treated by leaders; how easy or difficult it is to get resources, answers, and information. What employees experience is not the once-or-twice-a-year HR initiative, but all the micro-experiences they encounter each and every working day. 92% of employees describe their employee experience as their “everyday” experience. Moreover, only 42% of employees would rate their employee experience as positive or extremely positive.

92%

of employees describe their employee experience as their everyday experience

42%

rate their employee experience as positive or extremely positive

2020 GLOBAL CULTURE STUDY, O.C. TANNER INSTITUTE

The employee experience is going through a similar transformation to the one customer experience went through several years ago. First focusing on customer service, then customer personas and journey mapping, organizations now understand that customers are real people who interact with their companies in a multitude of ways. Rather than just being an end-user or persona, customers are real people with real needs and emotions. Customers have stories, a desire for connection, families, and feelings.⁴

This shift to the customer perspective has led organizations to focus on ways to create more positive experiences, not simply agonize over call center wait times and user interfaces. How do we anticipate and answer questions and satisfy needs without going through four layers of supervisors or digging through 16 pages of a user guide?

Sue Barret, sales philosopher and speaker, writes in *Smart Company*, “This concept is not new. Peter Drucker, the father of business management and culture, wrote in his 1953 book: ‘The purpose of business is not to make profit but to satisfy the needs and expectations of customers. The consequence of satisfied customers is incremental profit.’ For too long, many businesses ignored the advice of Peter Drucker and focused on profit only, looking at customers as numbers and a means to an end for profit.”⁵

The same can be said of the employee experience. Our research shows that nearly one-half of employees believe their organization regularly sacrifices the employee experience to improve the customer experience. For too long, companies have looked at employees as a means of production and profit, as evidenced by the term “human resources.” Ironically, most organizations have neglected to incorporate the human element into their employee experience.

“Experiences are key to defining human interactions. Just as consumers choose the experience of shopping, as much as they choose the products they buy, progressive companies see the workforce as their ‘customers’ and look to turn current and future employees into the best thing possible: true believers.”

—CINDY COLEMAN, GENSLER⁶

THE EMPLOYEE LIFECYCLE IS JUST A SNAPSHOT OF LIFE AT WORK

The employee lifecycle is only the tip of the iceberg. For starters, each lifecycle event or period is actually made up of many smaller micro-experiences. Onboarding is about accepting an offer, receiving a welcome letter, your first day at work, orientation, meeting your team, settling into your workspace, learning about the company purpose, logging on to your computer, meeting your leader, getting your first assignment, being overwhelmed by policies and procedures, finding the cafeteria, and so on. These experiences determine whether you get a good or bad start to your new job, whether you buy into the company's purpose, whether you fit and belong, even whether you want to stay. And while some stops on the lifecycle happen over a few days or weeks, like recruitment or separation, others can last half a lifetime, like development or retention. The point is, the lifecycle looks very different when you put the employee at the center, and when you look at the lifecycle from the employee's point of view.

When you look from the employee's point of view, thousands of new workplace experiences come into focus. The employee's experience at work is, in reality, made up of countless micro-, or everyday experiences, as well as less frequent, but more memorable, "peak" and "valley" experiences, as demonstrated by the next chart. In their book, *The Power of Moments*, doctors Chip and Dan Heath describe why certain experiences have an extraordinary impact on our life stories. We tend to remember the best (peak) and worst (valley) moments, and often forget the rest⁷. Are organizations paying attention to creating these peak moments that matter? Our research found that peak experiences and everyday micro-experiences play a role in shaping our employee experience and work/life stories. Each generates a different impact.

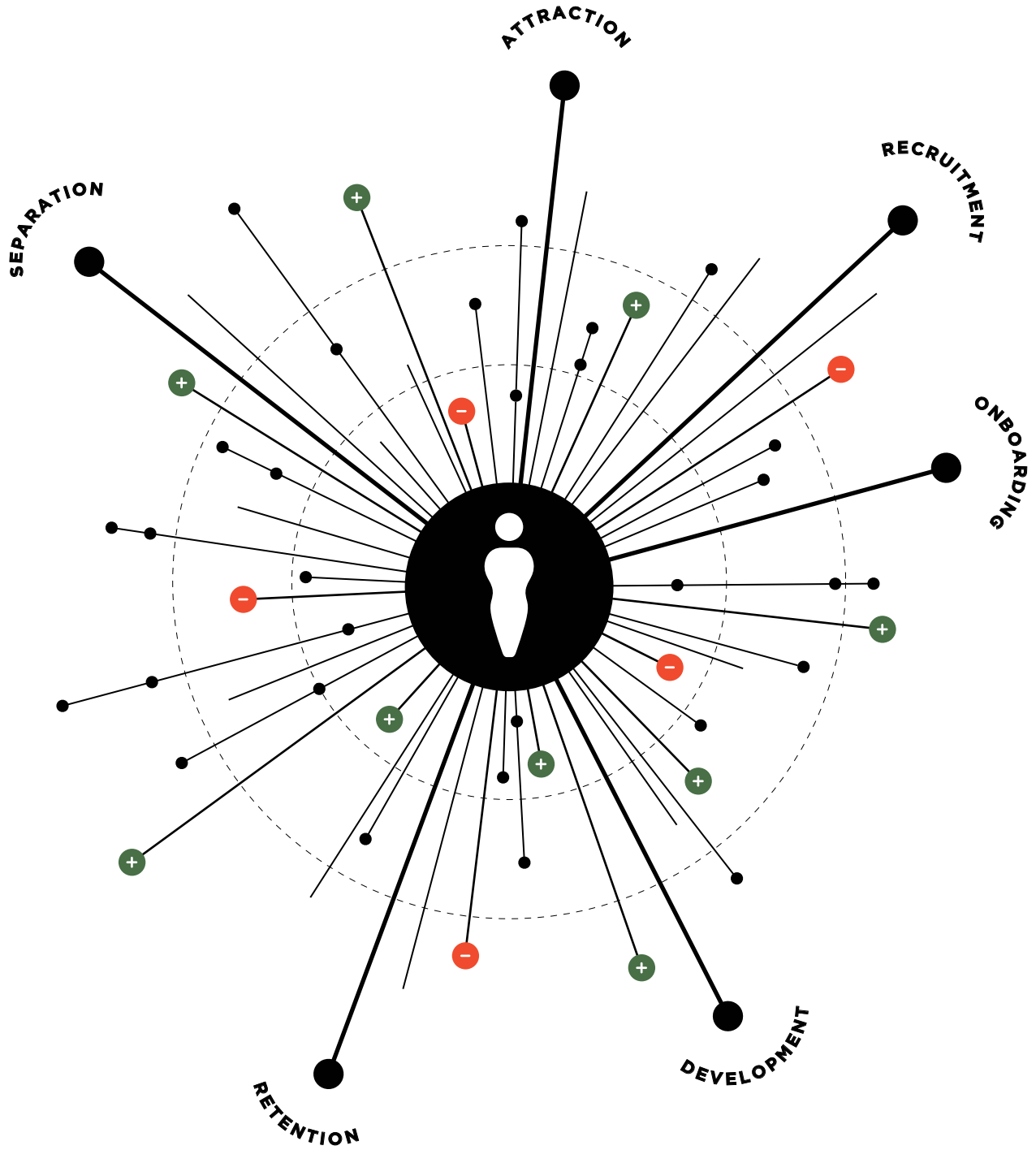


Figure 5. EMPLOYEE MICRO-EXPERIENCES
 The true employee experience involves many daily micro-experiences that go beyond the employee lifecycle and define life at work.

In order to make sense of the thousands of micro-experiences we might have in any given week or month or year, our brains simplify our interactions and group them into what we call “peak” experiences and “valley” experiences. These are different from “everyday experiences” as they tend to be more notable or remarkable than everyday interactions. Peak experiences are superbly positive experiences, while valley experiences are significantly negative experiences. Peak experiences could be as simple as an act of appreciation shown to someone or a great conversation they had with a senior leader, or as big as winning their first client or finishing a major project successfully. Valley experiences are formed when employees experience unnecessarily negative interactions with leaders and peers, unnecessary challenges and frustrations in getting resources or answers, feeling a lack of support, major undue stress, or a failed project.

Peak experiences, in particular, have a substantial impact. Because peak experiences tend to be accompanied by deep, positive emotions, they tend to be memorable. They serve as signposts and reference points to a broader story of the employee’s overall experience.

Peak and valley experiences help craft the overall story employees tell. Employees use them to create a narrative about their life at work. Day-to-day, personal micro-experiences, especially peak and valley experiences, are the real building blocks of a career. They are the wins and losses. They are the struggles and accomplishments. They are the moments remembered—the instances that create emotion from high and low points. The everyday micro-experiences impact our ongoing, overall sentiment about an organization, and the peak and valley experiences create the narrative we use to talk about it.

The impact of peak experiences lasts longer than valley experiences. Peak experiences affect an individual's perception of their employee experience for approximately four weeks, while valley experiences impact their perception for two weeks. That's why a few peak experiences can dramatically improve an employee's overall experience. HR groups work tirelessly to improve valley experiences because they can be challenging to address and often take months or years to fix. Creating peak experiences is not only more straightforward, but also a more effective path to shaping a positive overall employee experience.

Micro-experiences and peak and valley experiences are very important. But employees have numerous micro-experiences in any given day. How can organizations possibly affect them all?

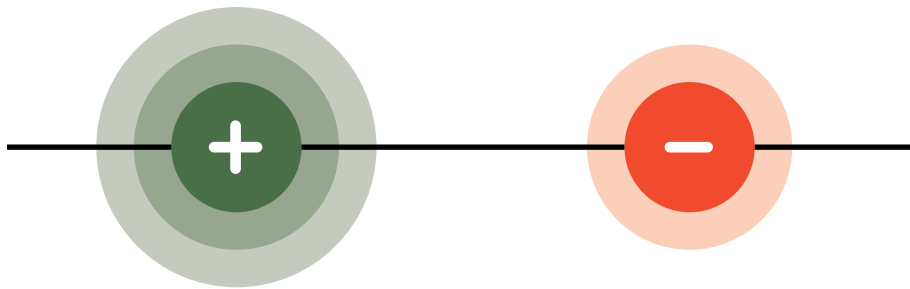


Figure 6. EXPERIENCE IMPACT
The influence of peak experiences lasts four weeks
while valley experiences last only two.

Culture and employee experience go hand-in-hand

HR leaders have been increasingly tasked by CEOs and senior leaders to cultivate a positive workplace culture and improve the employee experience. It's a daunting task. HR teams are implementing different initiatives and programs to try and tackle both successfully. While these unaligned, separate efforts on culture and employee experience have led to some improvement, we still have a long way to go.

Josh Bersin⁸ argues that “employee experience” has become a “giant vortex for everything in HR”, to the extent that all the programs that companies have invested in over the past few years have become part of the employee experience: think leadership, work environment, growth and development, health and wellbeing, etc. Organizations now struggle with too many programs, too much technology, too many fragmented tools at work—all under the guise of employee experience efforts.

Our research shows you can do both—build a vibrant workplace culture and an incredible employee experience—by better understanding the powerful relationship between the two.

The importance of an employee's micro-experiences cannot be emphasized enough. And workplace culture and employee micro-experiences are deeply interconnected. They work synergistically. Culture affects how employees interact, think, and work. It causes people to have specific micro-experiences, including peak and valley experiences. These experiences then, in turn, reinforce your corporate culture.

If you want to build a thriving workplace culture, create great micro-experiences. This is where the Talent Magnets come into the picture. They define the essential categories of experiences that

employees look for in a great place to work. So think of creating micro-experiences that connect employees to purpose, opportunity, success, appreciation, wellbeing, and leadership. An organization filled with peak and positive micro-experiences in each of those areas is one that employees will seek to work for, engage with, remain at, and give their heart-and-soul to help succeed.

“Our belief is that if you get the culture right, most of the other stuff, like great customer service, or building a great long-term brand or empowering passionate employees and customers, will happen on its own.”

—TONY HSIEH, ZAPPOS

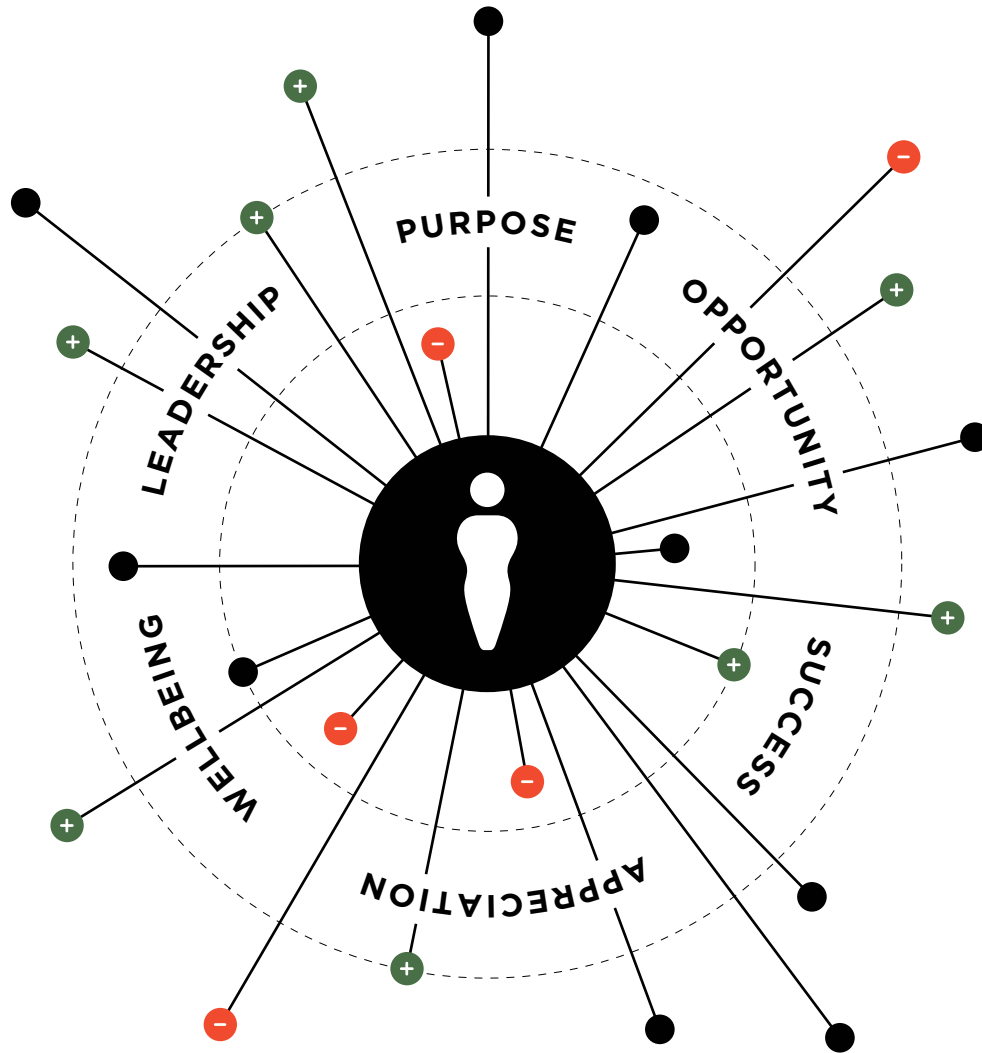
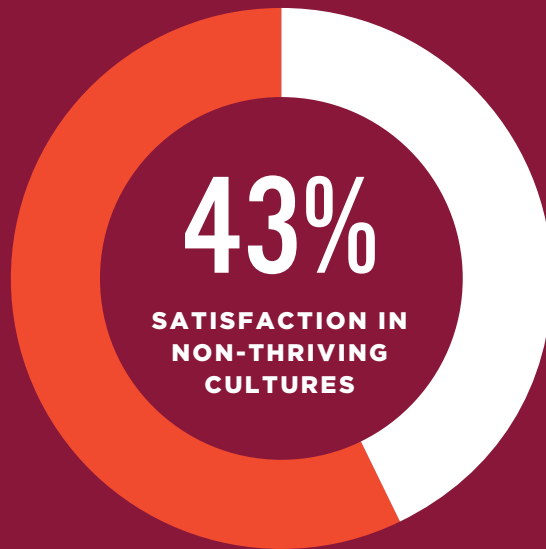
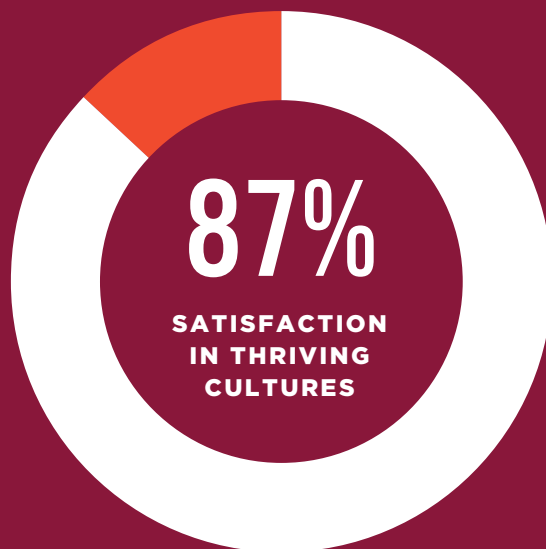


Figure 7. MICRO-EXPERIENCES AND CULTURE
 To create experiences beyond the employee lifecycle, look to the Talent Magnets. They provide the ideal framework for creating positive everyday micro-experiences—the very DNA of thriving workplace cultures.



WHEN ORGANIZATIONS HAVE A THRIVING CULTURE, EMPLOYEES RATE THEIR SATISFACTION WITH EMPLOYEE EXPERIENCE 102% HIGHER



Thriving cultures with great employee experiences are:

6x more likely to have promoters on the Net Promoter Scale

8x more likely to have high incidence of great work

13x more likely to have highly engaged employees

3x less likely to have layoffs

2x more likely to have increased in revenue

3x less likely to have employees experiencing moderate-to-severe burnout

7x more likely to have employees innovating

RECOMMENDATIONS

Rather than trying to implement disconnected programs that reflect the company point-of-view, intentionally design a culture focused on micro-experiences that connect employees to their work, their team, and the organization. We recommend you:

- 1. Diagnose if burnout is a problem in your organization and then find the cultural issues causing it.**
- 2. Rethink leadership. The outdated leader-knows-best style and lopsided power structure of leadership are not working anymore. Help leaders encourage a model of shared leadership with their teams.**
- 3. Build connections with people by better utilizing regular one-to-one conversations between leaders and their team members.**
- 4. Enable teams where employees feel included, supported, and psychologically safe.**
- 5. Actively listen to understand your people—don't ask for feedback just to "check the box."**

There are many tools to craft a best-in-class workplace culture with excellent employee experiences, but these five are critical for lasting impact. Each will be covered in detail in sections 4 to 8 of this report.

Focus on the importance of the employee point-of-view and designing up rather than defaulting to top-down. Look at the micro-experiences your employees are having and improve daily interactions. Create peak experiences. Not only will you significantly impact employee experience, culture, and business outcomes, but you will also reduce the likelihood of employee burnout, which is becoming the next workplace crisis.

EXPERIENCE—4 KEY TAKEAWAYS

Companies are missing the human part of the employee experience

Employee experience is made up of everyday micro-experiences

Peak experiences shape the narrative employees tell about their organizations

The employee experience and culture are intrinsically connected

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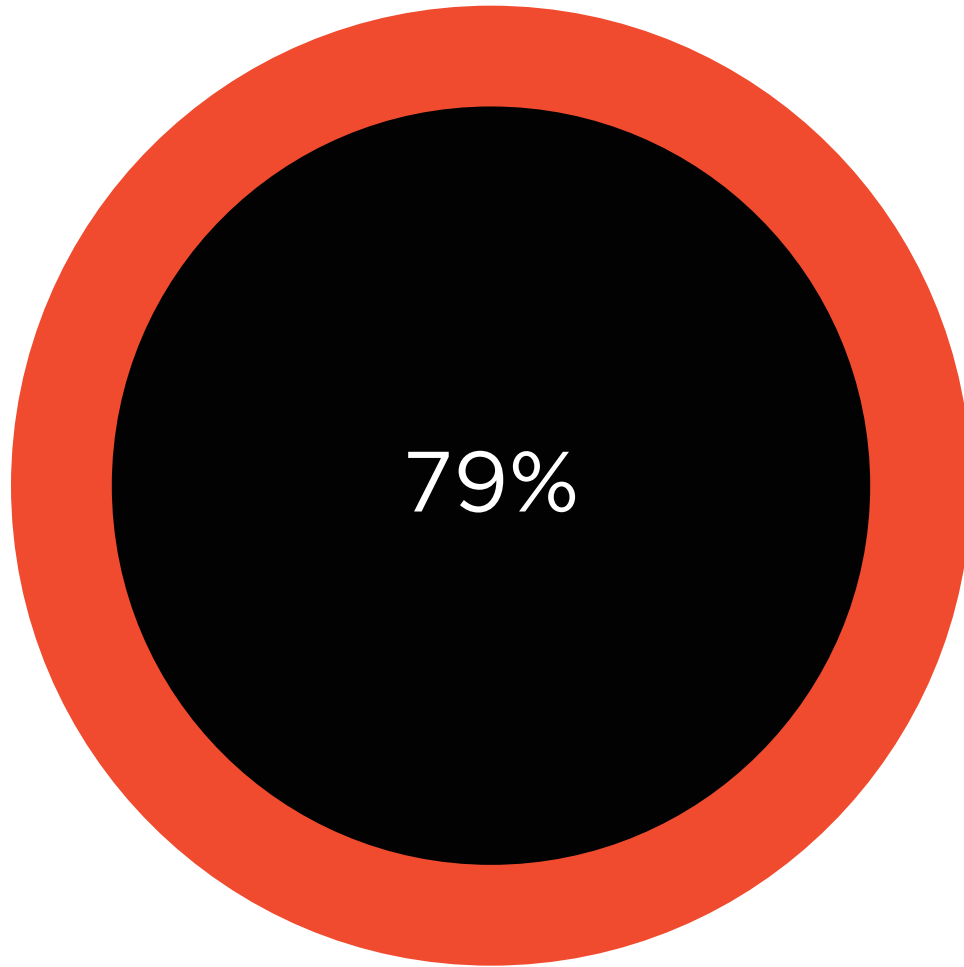
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Burnout



There's a new workplace crisis. And it comes from chronically ill cultures that are making people sick.





**79% OF EMPLOYEES ARE SUFFERING FROM
MILD, MODERATE, OR SEVERE BURNOUT**

Observant leaders recognize that the current workforce is shouldering unprecedented demands. Now, more than ever, employees are expected to do more with less. Burnout is a real and present threat. After decades of being isolated to a small number of specific industries, many global organizations now realize that burnout is more pervasive and may be curbing their ability to succeed.

Burnout not only affects the organization and its people, but also the larger communities to which they belong. This precipitates a wider ripple effect of elevated anxiety levels and other psychological and physiological health issues. Organizations need to measure burnout, identify workplace cultural preconditions that foster burnout, and take active steps to mitigate it.

A term once reserved for healthcare workers who put in too many hours in high-stress jobs, “employee burnout” has now extended across industries and applies to all types of workers. Recently, the World Health Organization officially classified burnout as a syndrome related to “chronic workplace stress that has not been successfully managed.”¹ Our research found 40% of employees are experiencing moderate-to-severe burnout. 95% of HR leaders admit burnout is hurting retention at their organizations, contributing to up to one-half of annual workforce turnover.²

Burnout can be measured through the following framework:

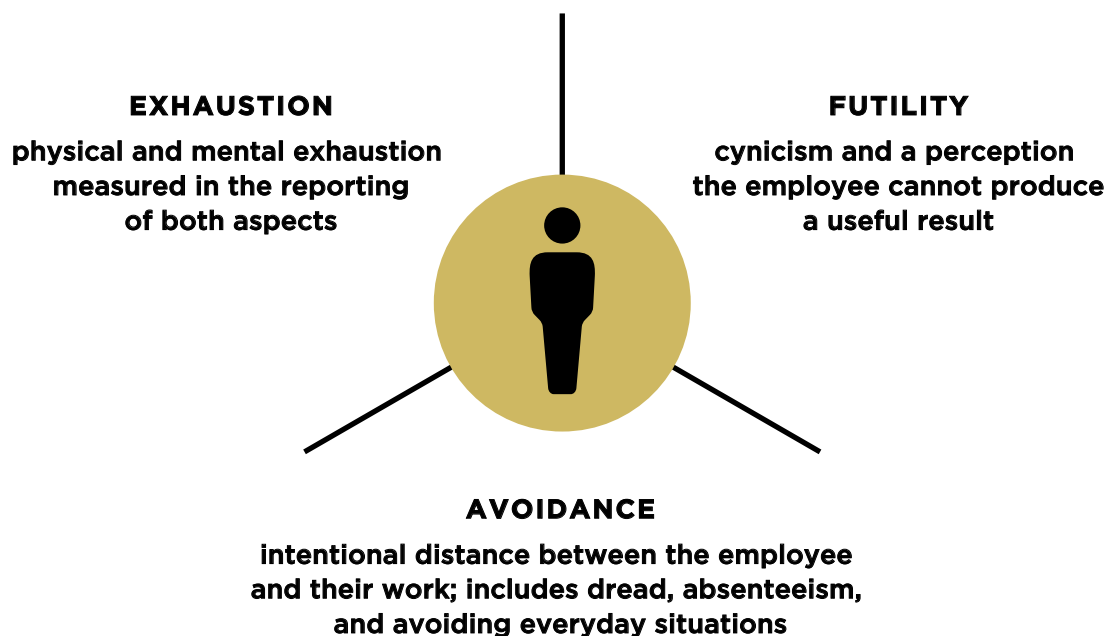


Figure 8. INDICATORS OF BURNOUT
Burnout exists when one or more of these factors are present.

Employee burnout is costly: burnout is estimated to be attributed to 120,000 deaths per year and \$190 billion in healthcare spending. This doesn't include burnout's toll on decreased productivity, an increase in errors, absenteeism, and other organizational costs.³ Companies with moderate-to-severe burnout have a 376% decrease in the odds of having highly engaged employees, 87% decrease in likelihood to stay, 22% decreased work output, and 41% decrease in the perception of the employee experience.

Moreover, the effect of burnout goes home with employees: Gallup reports burned-out employees are 23% more likely to visit the emergency room.⁴ Another study⁵ saw major health risks as a result of burnout: Type 2 diabetes, coronary heart disease, gastrointestinal issues, high cholesterol, and even death for employees younger than 45.

Even mild burnout has a negative impact on companies.

Companies with mild burnout see:

220% decrease in the probability of highly engaged employees

247% decrease in the probability of great work incidence

210% decrease in the probability an employee will be a promoter of the organization

12 point decrease in the reported employee experience rating

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Employees who say they very often or always experience burnout at work are:

63% more likely to take a sick day

23% more likely to visit the emergency room

2.6 times as likely to leave their current employer

13% less confident in their performance

GALLUP⁶

WHAT CAUSES BURNOUT?

Poor workplace cultures lead to a 157% increase in the incidence rate of moderate-to-severe burnout. A study by Kronos found 56% of burnout was caused by poor management and a negative work culture.⁷ Even the smallest lapses in workplace culture can lead to mild burnout.

Past research shows a lack of appreciation, conflicts in cooperation, role ambiguity, and role stress are all found to be strong predictors of burnout⁸. While Millennials⁹ are more likely than workers in older generations to feel burned out, burnout is similar in white-collar and blue-collar workers, leading us to believe it's not the type or amount of work that causes employees to burn out, but the culture they work in.

Why?

Working hard, day in and day out, and not feeling appreciated can accelerate burnout. A reduction in giving and receiving recognition leads to increased odds of burnout by 45% and 48%, respectively. When there was no consistent organizational strategy for recognition in place, the odds of burnout increased by 29%.

When companies treat their people as merely workers, rather than people, employees are more likely to feel burned out. Increased perception that the bottom line is more important than people leads to an 18% increase in the odds of burning out. Similarly, feeling stressed, overworked, and not connected to your team or organization can quickly burn employees out. Decreased work/life balance and decreased sense of belonging at work result in 26% and 21% greater odds of burnout.

In addition to reduced appreciation and wellbeing, we found that negative performance in purpose, opportunity, success, and leadership also increased the odds of burned-out employees:

Purpose: Companies with a non-existent or uninspiring purpose can increase odds of burnout by 39%. If employees don't have a unifying goal or mission to accomplish, or their organization's purpose doesn't resonate with them, they won't be able to work tirelessly to fulfill that purpose without burning out.

If you don't know (or aren't inspired by) the purpose of your organization, and why your work makes a difference, you're more likely to feel burned out. It's hard to stay excited when it seems the work you do simply doesn't matter to anyone. Employees need to know how what they do impacts the organization, customers, and society. If leaders fail to help employees see the larger picture or the "why" behind the work they do, there is a 22% increased odds of employee burnout.

A man with a beard and short hair is looking down at a stack of papers on a desk. He is wearing a light-colored button-down shirt. The background is slightly blurred, showing what appears to be an office environment with a computer monitor and other papers. The overall tone is professional and contemplative.

EMPLOYEE EXPERIENCE—CHRISTIAN

Christian, a mortgage broker, shared his story with us. After graduating from college, he landed his first real job. “I loved it,” he told us, “because the harder I worked, the more money I made.” He quickly became one of the company’s top brokers. “It was great at first,” he said. “My boss loved me. I was getting recognized all the time. But then everything changed.” Christian was assigned to a new department where his boss only cared about numbers. “I was still on top and getting great bonuses,” Christian said. “But, it never seemed to be enough. The aura changed. The accolades were over. The bar kept getting raised higher and higher until our goals were completely out of reach. The long hours and weekends were just expected. It wasn’t a happy place where we celebrated anymore. It was high stress.” Christian left the company within a year after the transition. “I was making amazing money. But, I was burned out.”

Opportunity: A lack of learning opportunities, or an increase in a sense of favoritism, can stifle engagement and increase odds of burnout by 16% and 23%, respectively. Employees want to grow and develop in their roles. They want to feel challenged and learn new things. If they feel there's no opportunity for personal growth and development in the organization, or that those things are reserved for a select few, they are more likely to feel burned out at work.

Leadership: Decreased trust in leaders can increase burnout by 29%. Lack of trust in a leader leads to resentment, disengagement, poor wellbeing, burnout, and, ultimately, turnover.

Wellbeing: Decreased work/life balance, feeling like work has a negative effect on health, or a decreased sense of belonging can increase risk of burnout by 22%, 40%, and 56%, respectively. When employees don't feel their best at work, physically, emotionally, or socially, they will eventually burn out.

“We talk about ensuring that employees are challenged, appreciated, and in sync with strategic objectives, but even when they have an emotional engagement with their work they sometimes still feel overwhelmed. While not all burnout can be eliminated, much of it can be avoided by balancing consistency and personalization of schedules and workload; leveraging managers as models for how their team can achieve work/life balance; and implementing tools and technology that proactively manage burnout.”

**—MOLLIE LOMBARDI, CO-FOUNDER AND CEO,
APTITUDE RESEARCH PARTNERS**

PREVENTING BURNOUT

We can't all do what Dutch design firm HelderGroen does to prevent burnout at work. The company closes shop at 6 p.m. every day, and physically lifts the company's desks up to the ceiling with steel cables. The floor is cleared of furniture and the space is rented, for free, to the community as a dance floor, reception space, or yoga studio. Creative director Sander Veenendaal says, "We think that doing activities like this makes it easier for people to work here. You know when it is time to relax or do something else that inspires you."¹¹ Unfortunately, most companies aren't physically able to follow HelderGroen's lead. However, there are many other ways to prevent burnout.

A 12-year study of the predictors and consequences of worker burnout found that burnout is a process. It's not something that happens overnight; rather it's a slow accumulation of exhaustion and cynicism. Giving employees more information, support, and control over their work could lower burnout levels.¹²

How can organizations do this? By creating peak and micro-experiences that help employees feel connected to their organizations, supported and appreciated by their leaders and teams, clear about their goals and performance, and listened to by their companies.

The same tools that can improve the employee experience (rethinking leadership, utilizing one-to-one conversations, building safe and supported teams, and active listening) also help with burnout. Perhaps the most impactful thing you can do is change how leaders interact with their teams. The many issues that cause employee burnout can be fixed with small changes in how your organization and leaders interact with employees on a daily basis.

BURNOUT—4 KEY TAKEAWAYS

Employees are more burned out than ever

The World Health Organization has made burnout an official syndrome

Employee burnout costs companies more than \$190 billion in healthcare spending

Burnout is caused by poor workplace culture

Burnout Sources

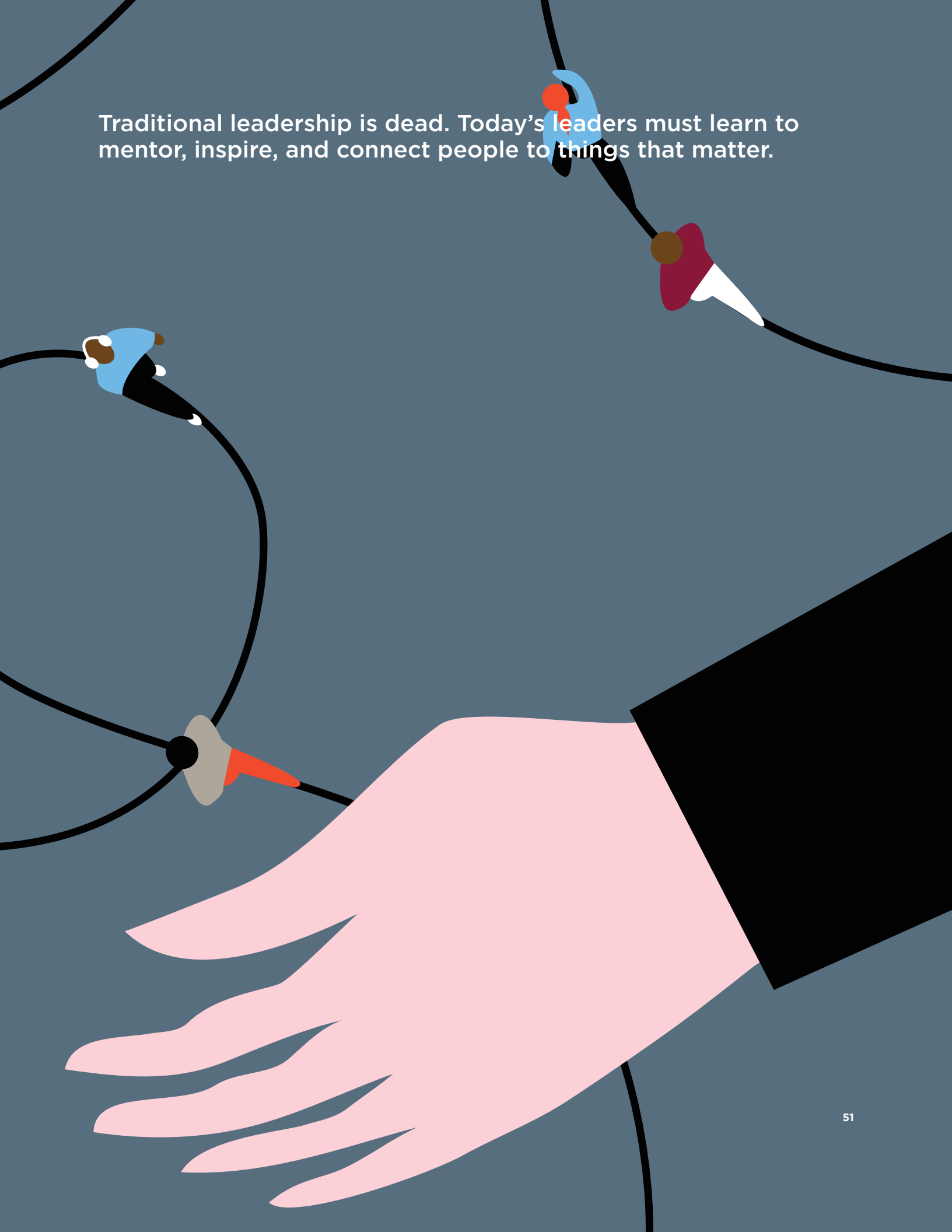
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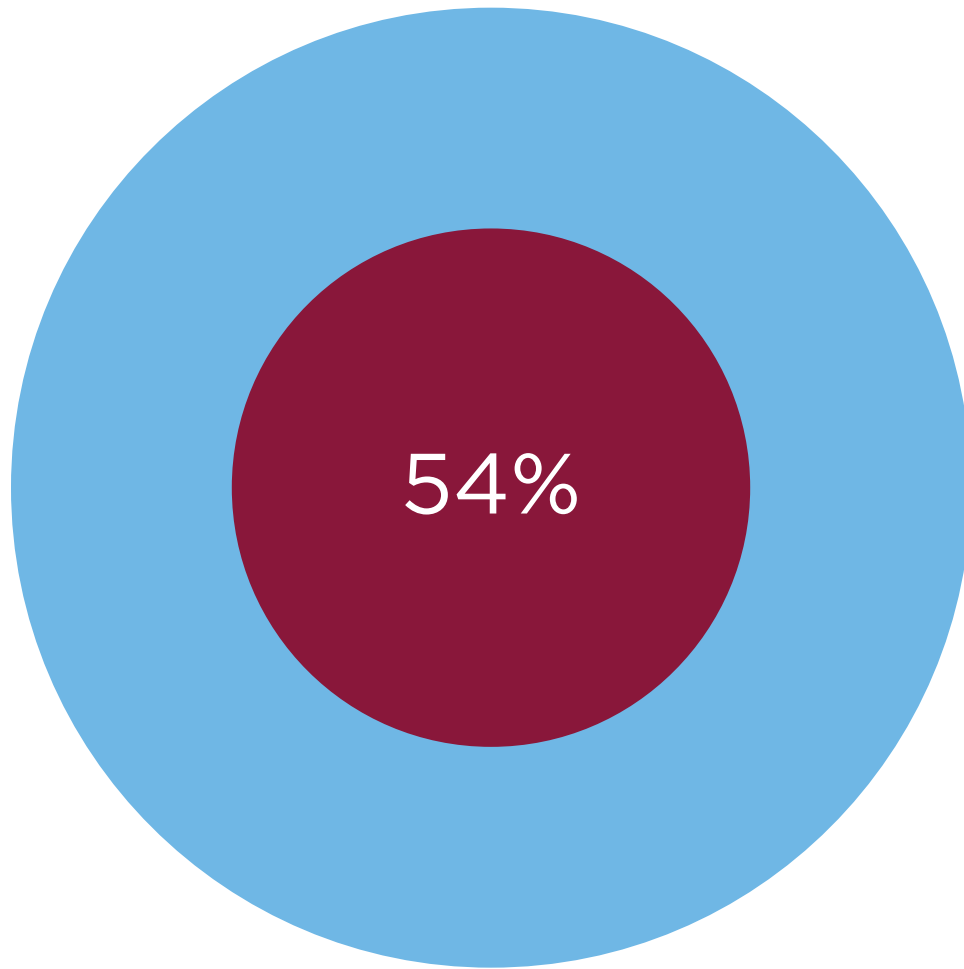
3

Leadership



Traditional leadership is dead. Today's leaders must learn to mentor, inspire, and connect people to things that matter.





**ONLY 54% OF EMPLOYEES REPORT THAT THEIR
LEADER KNOWS WHAT THEY DO**

We could all feel it coming. Now it's here. Younger generations are rejecting old-school leadership practices outright, forcing organizations to rethink and reshape the way leaders lead. The terms "boss" and "supervisor" sound out of touch to today's employees. Effective leaders are described as inspiring mentors, advocates, and influencers. By today's standards, if you aren't helping employees to succeed, learn, grow, and find meaning in their work, you're not viewed as a leader. Period. Great leaders connect employees to three essential things: purpose, accomplishment, and one another. They provide support, encouragement, and advice. They encourage employees to dream bigger, reach higher, and do their very best work. This, in turn, drives personal and organizational success.

Leaders are critical to building positive employee experiences. They hire the team you work with, set the tone for the team, affect wellbeing, and provide direction and resources. They help each individual to succeed, to feel appreciated and supported, and to grow and develop. They translate the purpose and values of the organization and personalize them for their team. Unfortunately, many of today's leaders and companies approach leadership traditionally, using aged practices that damage their teams, create negative experiences, and perpetuate chronically stressed workplace cultures.

A CRISIS IN LEADERSHIP

Most organizations still follow age-old traditional leadership practices that concentrate a dangerously high percentage of decision-making power and control in a small percentage of designated leaders. This robs individuals and teams of the opportunity to develop critical thinking skills and share responsibility. It also increases the risk of decision bias and reduced innovation. Workers have essentially tolerated (and resented) this management approach for decades. Now we're finding Millennials and Gen Z-ers are rejecting these practices outright and expecting more.

The research results are sobering. Less than one-half of employees feel their leader works to develop them. Only 26% feel their leader encourages collaboration. More than one-half say their leader won't give up control over anything. Only 59% believe their leader values them. 1 in 5 say their leader regularly expresses doubts about them.

The impact of poor leadership is disastrous. Companies that support and maintain these traditional leadership approaches have lower scores on employee experience, engagement, great work, NPS, and all six essential aspects of workplace culture—purpose, opportunity, success, appreciation, wellbeing, and leadership. They have a decrease in odds of growing revenue and increased odds of laying off employees.

OUTCOME	EFFECT OF "TRADITIONAL" LEADERSHIP PRACTICES
Employee Experience	-43%
CULTURAL IMPACT	
Purpose	-20%
Opportunity	-42%
Success	-27%
Appreciation	-38%
Wellbeing	-13%
Leadership	-36%
Engagement	-33%
Great Work	-58%
Promoter	-44%
Burnout	+10% greater incidence of burnout
Revenue	-84% odds of growing revenue
Layoffs	+16% odds of layoffs

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More than a century ago, German sociologist Max Weber argued that “highly organized bureaucracies with clear hierarchies” were the best way to run businesses.¹ More than 100 years later, too many companies are still following this philosophy, despite decades of evolution in our working environment.

The modern workplace has changed. No longer are employees working 9-5 in an air-conditioned cubicle or office, taking an occasional break to mingle by the water cooler. Employees aren't working on teams of 200 people with one boss who tells them what to work on and how to do their jobs.

FLEXIBLE WORKSPACES

74%

of employees have the ability to move to different areas to do their work

FLEXIBLE WORK TIME

52%

of employees say they have some choice over when they work

REMOTE WORKING

43%

of employees work away from their team at least some of the time

MATRIXED TEAM

84%

of employees are matrixed to some extent²

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Leaders often think their remote workers' expectations of work are the same as in-office employees', but if not managed well, the element of isolation for remote workers can result in a 21% drop in performance.³ Leaders need to adapt to a more mobile, autonomous, global workforce.

Other things have changed as well. Newer generations aren't as interested in money, legacy, or hierarchy. 89% of employers think employees leave because of money, when only 12% actually do.⁴ In fact, according to a survey by Virtuali, 47% of Millennials want to be leaders because they want to empower others, not because they want to tell people what to do.⁵

“Boomers have been autocratic leaders that are all about command, control and policies, such as working nine-to-five. Millennials want to create a more collaborative environment where they exchange ideas with peers and accomplish a mission instead of a corporate culture that’s rigid with policies and procedures.”

—SEAN GRABER, CEO VIRTUALI⁶

In order to effectively lead these new generations of employees, companies will need to drastically change how their leaders interact with their people. The traditional leadership style, along with its associated guarding of information and decision-making, is going away.

GREAT LEADERS HELP PEOPLE MAKE CONNECTIONS

Employees are looking for more than a boss and micromanager; they are looking for a leader who mentors and inspires. They want a leader who is interested in them, who cares about their goals and aspirations. One who encourages them to strive for greatness and helps them feel connected.

27%

Inspiration is 27% more predictive of performance than employee engagement. When employees are authentically dedicated, deeply accountable, and fully responsible, they contribute in an enduring and consequential way.

THE HOW REPORT, 2016⁷

Great leaders connect employees to three specific things: purpose, accomplishment, and one another. They show how their employees' work makes a difference, how it furthers the company's purpose, and why it matters. They teach people to succeed and help them accomplish great things by connecting them with new skills and new ways of working. And they bring people together by building strong teams and enabling strong social networks.

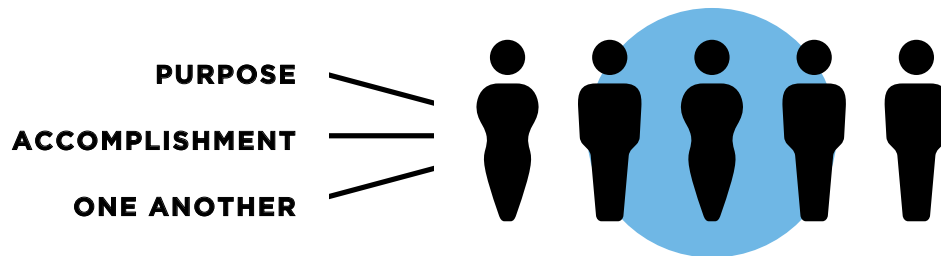


Figure 9. CONNECTIONS THAT MATTER
Great leaders connect team members to three things.

The numbers are overwhelmingly in favor of this new kind of leadership. Our research shows that when leaders connect their people to purpose, employees are 373% more likely to have a strong sense of purpose, 747% more likely to be highly engaged, and 49% less likely to burn out.

Our data also shows when leaders connect their people to accomplishment, there is a 259% increase in odds an employee will have a strong sense of opportunity, 247% increase in odds an employee will do great work, and they will be 46% less likely to burn out.

When leaders connect their people to one another, there is a 156% increase in odds that an employee will have a strong sense of wellbeing, a 374% increase in odds that an employee will feel appreciated, and the employee will be 47% less likely to burn out. All of which indicates that modern leaders need to learn and practice the art of building connection.



When leaders connect people to purpose,
accomplishment, and one another:

250%

greater odds an employee will be a promoter

405%

greater odds an employee will highly rate
their employee experience

845%

greater odds an employee will be engaged

1,674%

greater odds an employee will have a strong
positive perception of leadership

56%

reduction in burnout

The impact of reinventing leadership is powerful. When companies adopt a more connected, collaborative, and mentoring approach to leadership, they see massive improvements in the employee experience, all six essential elements of workplace culture, engagement, great work, and the likelihood to recommend the company. There's also less burnout, fewer layoffs, and increased revenue.

On the other hand, organizations with traditional leadership styles see dramatic decreases in the employee experience and all areas of workplace culture, higher burnout rates, and an increased odds of layoffs.

“We’re not just selling a cot, for example. We’re selling something so important to a mother, something so important to a father. We are becoming part of a person’s life and a part of a person’s home, and that’s the difference we’re making.”

—FOCUS GROUP PARTICIPANT, UK

57%

When leaders connect their people to purpose, accomplishment, and one another, there is a 57% reduction in burnout.

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THE EVIDENCE FOR CONNECTION IS CLEAR. BUT HOW CAN LEADERS PUT IT INTO PRACTICE?

It's easy to tell leaders they have a new role, to connect team members to purpose, accomplishment, and one another. But how does that actually look in practice? What are some day-to-day micro-experiences leaders can create for employees to make those connections stick? Are there examples we can learn from? Are any leaders or companies out there doing a good job of this already?

The answer is yes. As part of this year's Culture Report, we researched what leaders in top organizations are doing to build the kinds of connections we are talking about. The following pages take the idea of connection one layer deeper to reveal the day-to-day experiences leaders are using to actually help employees feel a deeper connection to things that matter. Because, as the research indicates, those connections are key to employee engagement, productivity, longevity, and growth.

MEASURE	TRADITIONAL LEADERSHIP	MODERN LEADERSHIP
Employee Experience	-43%	+55%
CULTURAL IMPACT		
Purpose	-20%	+38%
Opportunity	-42%	+43%
Success	-27%	+35%
Appreciation	-38%	+42%
Wellbeing	-13%	+66%
Leadership	-36%	+56%
Engagement	-33%	+40%
Great Work	-58%	+86%
Promoter	-44%	+64%
Burnout	+10%	-57%
Revenue	-84% odds of growing revenue	+81% odds of growing revenue
Layoffs	+16% odds of layoffs	-67% odds of layoffs

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RECOMMENDATIONS & IMPACT

To connect your people to purpose, accomplishment, and one another, leaders should do the following:

1 Connection to Purpose

Clearly articulate the meaning of each employee's work and communicate how it impacts the organization, its customers, and the world. This can be done in four ways:

Understand what your employees actually do. While this seems elementary, only 54% of employees report that their leader knows what they do. When leaders make an effort to understand their employees' jobs, their struggles, challenges, workload, and responsibilities, employees feel their leader is invested in the work they do. In fact, there is a:

36% increase in employees feeling they have the support of their direct leader

35% increase in the feeling that their leader acknowledges the great work they do

29% increase in engagement



BEST PRACTICE—NIKE, GOOGLE, AND CVS

Imagine an employee who spends their day assembling spray bottles for window cleaners. Their mindset is focused on zero defects. Their focus might be on streamlining efficiency and meeting quotas. But they might never get the chance to see how their work impacts the lives of their customers—a parent watching children play in the back yard and ensuring no one gets injured, a pilot cleaning a windshield before flight, or a weary driver pulling into a gas station in the middle of the night to ensure a clear view for the next few hours of driving. Instantly, an employee assembling spray bottles understands the impact they have on the recipient of their work. This impact can be shared with employees through customer testimonials, field trips to see customers engage with the work, and shared through company purpose and vision statements. Consider the mission statements of organizations like: **Nike** (to bring inspiration and innovation to every athlete in the world), **Google** (to organize the world's information and make it universally accessible and useful), **CVS Corporation** (to be the easiest pharmacy retailer for customers to use). When employees see and hear about how their work contributes to the organization, and to the lives of their customers, they are more likely to give their all.⁸

Articulate why your employees' work has meaning. Why is the work each person does important? How does it make a difference and further your organization's purpose? We all want to do something that matters. By clearly communicating the meaning of an employee's contributions, companies can see a:

15% increase in organizational purpose clarity

17% increase in purpose differentiation

27% increase in pride in the organization

21% increase in putting discretionary effort into helping the organization succeed

200% increase in the incidence of great work

Show how your work affects the customer. Most employees don't come to work to help your company make money. They invest effort to make a difference in the world. How does their work improve the lives of your end-user, the customer, and community?

When leaders can express the specific way an employee's work impacts customers, there is a 22% increase in feeling like the organization inspires employees to work toward a collective goal, and a 23% increase in feeling like the organization's purpose motivates employees to do their best work.

Create shared plans and goals with your team and connect them all back to your organization's purpose. There's a 103% increase in the perception of employee experience and an 87% increase in the amount of great work happening when leaders are transparent with their team about how they collectively can work together to achieve the company's purpose.

2 Connection to Accomplishment

Show you believe in your people, be involved in the entire process of accomplishment, and allow employees to lead out on their own.

Actively show you believe in your people and value their career goals. Talk with employees often about their own personal goals and dreams for their role. Tell them you value their unique skills and talents and believe they can succeed. Trust them to make decisions and work autonomously. When this happens, there is a:

39% increase in an employee feeling like they have the opportunity to grow, even if they weren't a "favorite"

33% increase in an employee feeling like they are working for a winning team

43% increase in an employee feeling like they belong at the organization

“What makes Pixar special is that we acknowledge we will always have problems, many of them hidden from our view; that we work hard to uncover these problems, even if doing so means making ourselves uncomfortable; and that, when we come across a problem, we marshal all of our energies to solve it.”

—ED CATMULL, CO-FOUNDER AND FORMER PRESIDENT OF PIXAR

Stay involved during the entire process of achievement, providing specific, constructive feedback throughout, not just at the beginning or the end. Don't micromanage the project or process, but celebrate small accomplishments, act as a guide and advocate for your people, and work to break down barriers inhibiting innovation. Check in often with your people on their progress and offer coaching and support. When leaders do this, they see a:

86% increase in feeling they are learning new, valuable things in their current role

43% increase in feeling like they receive the support they need from their leader to do their job well

207% increase in feeling like their leader connects them with opportunities

29% increase in knowing what the leader wants them to achieve

133% increase in the incidence of great work

Recognize your people throughout the process, not just when an accomplishment has been made. By recognizing small wins and efforts along the way, leaders see an 83% increase in engagement and a 136% increase in feeling like a subject matter expert at their organization. A word or note expressing appreciation when a team member puts in extra effort, overcomes an obstacle, innovates, helps a peer, or goes above and beyond provides extra encouragement and motivation to succeed.



LEADER EXPERIENCE—JAY SAMIT

Success is a process. Projects often get worse before they get better and eventually achieve success. In fact, most workplace projects are similar to getting a haircut. Things are going to look worse before they look better. And employees need to be recognized throughout the life of a project—for their small wins, their daily efforts, and even during times of struggle—because knowing they’re supported during failures is important. Jay Samit, author of *Disrupt You*, is a person who has spent his entire career in tech and innovation. He may have summarized it best when he told us, “I have always told my employees that if they do not fail within the first year of employment, they will be fired. If people are not failing, then they aren’t truly trying to improve something.”⁹

Share leadership. Give employees latitude to lead out on their own. Employees don't want a micromanager; they want a leader who inspires them. When you empower your people to take ownership, make decisions, lead, and innovate, you'll find:

88% increase in the sense of opportunity at the organization

78% increase in engagement

255% increase in the incidence of great work

184% increase in the perception of their direct leader

**“Before you are a leader,
success is all about growing
yourself. When you become
a leader, success is all about
growing others.”**

—JACK WELCH, FORMER CEO, GE

3 Connection to One Another

Mentor, encourage collaboration, and help employees build their own social networks within teams and with others in the organization.

Connect employees to their team, either for mentorship opportunities or project guidance. When employees feel connected to their teams, there is a:

91% increase in feeling like they belong at the organization

133% increase in feeling like they continuously learn new and valuable things

55% increase in engagement

83% increase in the incidence of great work

Encourage collaboration within and outside of the team whenever possible. This is a departure from traditional, “territorial” behaviors. When leaders do this, companies see a:

43% decrease in the incidence of observed exclusion

133% increase in promoters on the net promoter score

44% decrease in the incidence of moderate-to-severe burnout

BEST PRACTICE—DELTA

A core principle to building trust and connection with employees is engaging them in solving problems and co-creating solutions. Consider the lengths Delta Airlines pursued when it recently launched new uniforms throughout the company—for all employees. You may have noticed the striking purple attire on a recent flight, aptly named “Passport Plum.” The company knew the project would be daunting. They also knew that they wanted to include opinions from employees—the people who would be wearing the uniforms on daily basis. Conducting more than 80 employee focus groups and reviewing more than 30,000 employee survey responses, Delta’s design team then made more than 165 changes to the uniforms before launching the final product. Employees knew their opinions were heard. “The new Delta uniform collection offers unity between all workgroups like never before,” said Delta CEO Ed Bastian. “We are one proud Delta team and it really shows.”¹⁰

A photograph of a meeting room with a whiteboard and people working. The image is overlaid with a semi-transparent red filter. In the background, a whiteboard has some faint writing on it. A man with a beard is sitting at a table on the left, looking at a laptop. A woman with curly hair and glasses is standing on the right, looking towards the camera. There are other people and tables in the foreground, but they are out of focus.

BEST PRACTICE—BP

BP is an example of a company that is intentional about building connections between their people located all over the world. Percentage-wise, just a small portion work at the company's headquarters. Realizing this could negatively impact decision-making and collaboration, the company set out to nurture social networks by moving employees across functions, business units, and countries as part of their career development. By changing roles frequently, and working with new team members frequently, the company has been able to socialize learning across business units and develop strong personal connections between people that break down territorialism. As a result, it is not uncommon for leaders at BP to have worked in numerous businesses at various geographic locations over the past decade. This builds relationships across the entire organization.¹¹

Build a team that cares about each other, can depend on one another, and celebrates each member's success. Teams with leaders that do this well have members with a 284% increase in feeling like the employee belongs at the organization, 33% increase in engagement, 41% increase in likelihood to stay, and 88% increase in a sense of wellbeing.

CONCLUSION: CONNECTIONS HELP PEOPLE THRIVE.

Modern leadership is moving beyond telling employees what to do; it's about inspiring them to find and carve out their own path. Smart leaders look for opportunities to create micro-experiences that connect employees to purpose, accomplishment, and one another that build a culture of motivation and success and propel employees to do great things. Helping leaders shift from a traditional mentality to a more modern mindset takes time (and active development), but it will dramatically improve the everyday employee experience, create a thriving workplace culture, and lead to business success.

**“Success is best when
it's shared.”**

—HOWARD SCHULTZ, CHAIRMAN & CEO, STARBUCKS

LEADERSHIP—4 KEY TAKEAWAYS

Leaders have a major impact on company culture and the employee experience

Traditional leadership practices are outdated and being rejected by the modern workforce

Effective modern leaders are mentors and coaches rather than bosses

Great leaders focus on connecting people

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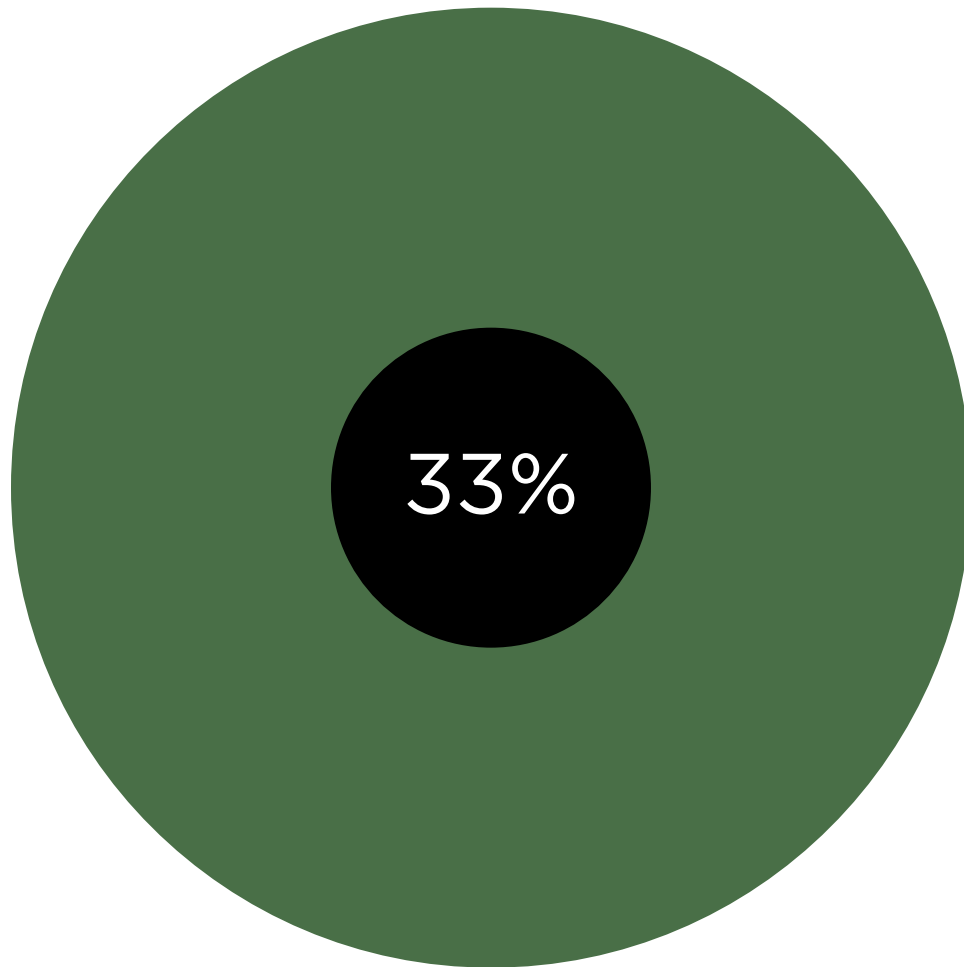
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One-to-ones



One-to-ones are a crucial point of connection and an underutilized, but powerful tool for leaders.





**33% OF EMPLOYEES DREAD MEETING
WITH THEIR LEADER**

Though simple in principle, one-to-ones have been elusive as an organizational practice. Companies and leaders know they're an essential part of people management, but their integration into the employee experience has been haphazard at best. Moreover, even if leaders are having consistent one-to-ones, the vast majority are rigid, too focused on project updates, and not attuned to what the employee sees as a valuable use of time. One-to-ones may be difficult to get right, but they are a vital part of the employee experience. Increased engagement, reduced burnout, and plenty of great work await organizations and leaders who have co-created, meaningful, bi-weekly one-to-ones.

Last year, we saw in our research that the annual review cannot be the only method of performance management. Its generic, one-size-fits-all approach makes it impersonal, biased, emotionally charged, and largely ineffective. Employees must be given the opportunity to discuss their progress in performance and development with their leaders more than once a year. Ideally, a whole lot more.

The solution is continuous performance management and co-created one-to-ones. Continuous performance management is more useful and engaging, and still includes an annual review (along with other reviews, team meetings, and conversations). Co-created one-to-one meetings are just as essential and provide far more than just a time for leaders to check in on their direct reports. Regular one-to-ones enable leaders to form meaningful, collaborative connections. They act as positive micro-experiences that reinforce your culture by connecting people to purpose, showing appreciation, and providing opportunities for mentoring and development.

Peter Cappelli and Anna Travis explain in a recent *Harvard Business Review* article that companies are doubling their efforts on employee development by putting employees in charge of their own growth. Doing this, however, requires a high amount of feedback from leaders, something that's "better met by frequent, informal check-ins than by annual reviews."¹



LEADER EXPERIENCE—MICHAEL MASSARI

We've heard some leaders make the assumption that certain types of workers, especially younger workers, would prefer to communicate via technology instead of having in-person one-to-one meetings. Michael Massari, Caesars Entertainment's Senior Vice President of National Meetings and Events—a leader who has been featured in nearly every meetings trade publication—disagrees. "Millennials are highly collaborative and want instant feedback. They want to meet, learn and grow. If we don't engage Millennials through active participation in face-to-face meetings, and if we don't help build their professional relationships, we will lose their talent and attention to organizations that do."²

MISSED OPPORTUNITIES

The one-to-one meeting is not new. It's been around for a while, and we found that 56% of employees reported having a regular one-to-one meeting. But 1 in 3 employees dread meeting with their leader, and 1 in every 5 one-to-ones are canceled. Just less than one-half of employees and leaders prepare for one-to-ones with each other, and 1 in 3 employees have no say in their agenda.

Not surprisingly, one-to-one meetings haven't been very effective.

This is a grave missed opportunity. One-to-one meetings serve as a connection point between leaders and employees. They encourage authentic communication, meaningful development conversations, and give employees opportunities to discuss their goals, purpose, and a direction they can work towards. They are crucial micro-experiences to get right.

Burnout can be mitigated simply by having frequent one-to-ones:

**Monthly one-to-ones
decrease the odds of
employee burnout by**

39%

**Bi-weekly one-to-ones
decrease the odds of
employee burnout by**

84%

2020 GLOBAL CULTURE STUDY, O.C. TANNER INSTITUTE

A study of European CEOs³ found that CEOs who worked more hours typically spent those extra hours meeting with their people. Extra time spent at work with employees improved company performance, while extra time at work spent with people outside the company didn't seem to make a difference. A 1% increase in the number of hours a CEO spent with his or her own people correlated to an increase in productivity of 2.12%. While CEOs are expected to be the public face of their company, the reality is that interacting with and supporting employees is a much more effective use of their time.

One-to-one meetings have a substantial impact on workplace culture and multiple aspects of “the employee experience.” When one-to-one meetings are done well, there is a:

432% increase in the odds that an employee has a strong sense of leadership

226% increase in the odds an employee will highly rate their employee experience

430% increase in the odds that an employee will be highly engaged

27% decrease in employee burnout, and a 58% decrease in moderate-to-severe burnout



LEADER EXPERIENCE—BEN HOROWITZ

Ben Horowitz, former CEO of Opsware, recalls a time where he almost fired a manager and his senior leader because the manager was not having one-to-ones with his team. The manager had not met with any of his employees in the past 6 months, and because of that, the manager had no real connection with his people or any idea how his team members felt about their jobs or the company. Horowitz's purpose was to make Opsware a good company to work for because it was important to him that "the people who spend 12 to 16 hours/day here, which is most of their waking life, have a good life. It's why I come to work." Horowitz felt so strongly about getting their culture right, he gave the manager 24 hours to meet with each of his employees, or both he and his senior leader would be fired.⁴

"One-to-ones provide an excellent mechanism for information and ideas to flow up the organization and should be part of your design."
—Ben Horowitz, former CEO, Opsware

THE IDEAL ONE-TO-ONE MEETING

Many leaders aren't sure what makes a great one-to-one meeting. They don't know when to have it, what to discuss, what it involves, or how it's different from other types of meetings. Some see it as a waste of time, while others are simply unsure how to maximize their utility. They can be perceived as awkward, causing leaders to avoid or repeatedly postpone them altogether. But if you get the fundamental components right, one-to-ones are simple: just two people having a natural, meaningful conversation.

First, our global research shows that at a minimum, one-to-ones should be monthly, but having bi-weekly or weekly meetings is more impactful. Bi-weekly or weekly one-to-ones have a significant impact on employee perceptions:

157% increase in the probability an employee will believe their leader understands the realities of their day-to-day job

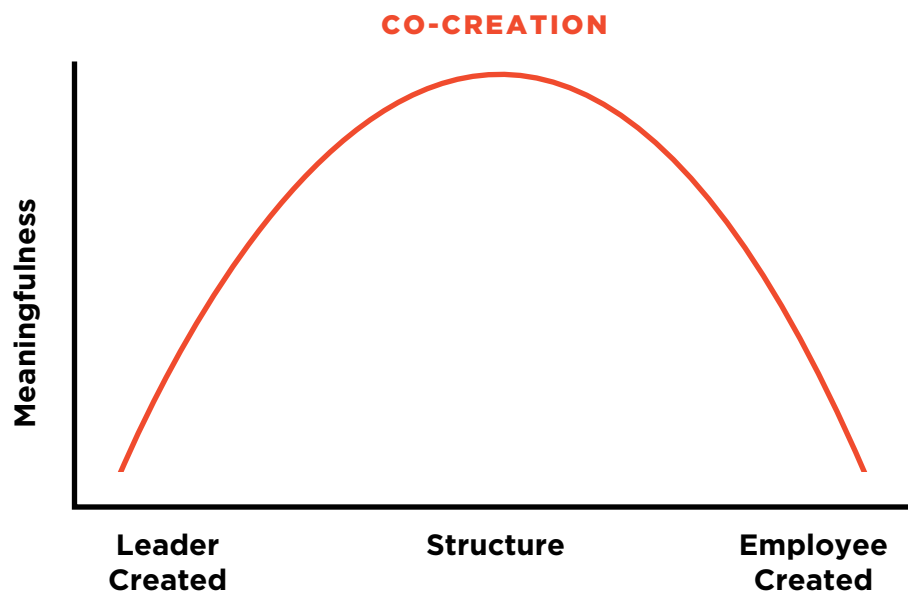
276% increase in the probability an employee feels like they are close with their leader

251% increase in the probability an employee feels like their leader is an advocate for their career

“We have one-to-ones monthly because the work we do is quite stressful. I find that if we don’t have them regularly, we have more problems. Sometimes, when it has been three months, morale in the team goes down. One-to-ones help address issues as we go along, not wait 12 months to fix.”

—FOCUS GROUP PARTICIPANT, UK

Secondly, co-created conversations are ideal, as they make the meeting meaningful to both employees and leaders. Both leaders and employees should work together to set the agenda and craft a purposeful conversation. Additionally, as the structure of one-to-ones become more formal and rigid, meaningfulness decreased.



Finally, the best one-to-ones include four parts:

1. Constructive feedback
2. Recognition
3. Time to brainstorm new ideas and approaches
4. Opportunity for development

“Both the leader and the employee should have an idea of what the meeting will cover. They should not have a meeting just to have a meeting, they need to be prepared for what the meeting will accomplish.”

—FOCUS GROUP PARTICIPANT, AUSTRALIA

When all four elements are part of a one-to-one meeting, perceptions of employee experience and workplace culture both improve:

MEASURE	IMPACT ON THE PROBABILITY OF A FAVORABLE PERCEPTION
Employee Experience	+41%
CULTURAL OUTCOMES	
Purpose	+32%
Opportunity	+73%
Success	+53%
Appreciation	+73%
Wellbeing	+47%
Leadership	+91%

2020 GLOBAL CULTURE STUDY, O.C. TANNER INSTITUTE

However, if a one-to-one is used only to provide the department or company updates, there is a negative effect on sense of opportunity (decreases 14%), appreciation (decreases 19%), and leadership (decreases 7%).

One-to-ones provide an opportunity to prevent emerging issues from becoming bigger problems. They allow the employee and leader to address issues as they happen, rather than waiting until the end of a project or several months later. A word of caution, though: one-to-ones can lead to feeling micromanaged if too much course-correction is involved.

“Hold presence, be fully with your person right now. There is nothing else in the world that needs your attention. This is the most important thing you have to do right now. Hold these people as magnificent. Intend for them to shine. And they will step into that. They will feel your presence, your regard for them, and your intent. And if there are concerns, you will navigate them together.”

—ANESE CAVANAUGH, CONTAGIOUS CULTURE⁵

RECOMMENDATIONS & IMPACT

One-to-ones are a critical component of positive workplace cultures. As a tool, they can influence all six Talent Magnets. But it's not enough to hold them regularly, they need to include the right best practices:

①

One-to-ones should be informal, relaxed, and feel more like a regular conversation.

They should happen “in-the-moment” and often. When one-to-ones become a natural habit, employees feel more at ease and valued. They also feel more confident in opening up to their leader and being transparent about their concerns and challenges.

When one-to-ones feel more relaxed and informal, we see a 212% increase in the probability of a favorable leadership perception.

“The best one-on-one is personalized to me and my concerns, or what I want to address. It is informal, approachable, and we’re not afraid to say something. It may include hearing winning stories about other people to motivate me by how others achieved a deal so I can apply that to what I’m trying to do.”

—FOCUS GROUP PARTICIPANT

Employees and leaders should both have input into the content of the one-to-one.

Co-creation is a necessary part of successful one-to-ones. Leaders can take time to act as mentors to their people, check in, give guidance, and provide coaching in areas that employees request help or want to focus on. This leads to a 388% higher probability of favorable leadership perception.

Possible items to include for one-to-one meetings:

- 1. What's new? What's going on?**
- 2. Positive feedback, discuss achievements**
- 3. Current issues, areas where they need help from leader**
- 4. Discussion/brainstorm solutions**
- 5. Employee growth/development plan, coaching, areas for improvement**
- 6. Plan of action/next steps**
- 7. Any other questions/concerns**

Employees and leaders should both prepare for the one-to-one.

Employees want one-to-one meetings to be very action-focused. They are looking for specific steps from their leaders to break down barriers, coach them on areas to improve, and follow through on personal development plans.

This takes preparation—from both parties. There is a 127% increase in an employee's perception of their leader when the employee is encouraged to prepare for their one-to-one. When leaders prepare, there is a 219% increased probability of favorable leadership perception by employees.

While one-to-one meetings are not new, their potential is rarely realized. Leaders who take the time to prepare for and co-create meaningful, informal, frequent, one-to-one conversations have an easier time anticipating and preventing the problems that make people leave organizations. They create development opportunities, show appreciation, and provide the mentorship and support that builds positive micro-experiences. One-to-ones are part of a continuous performance management process that enables employees to learn, grow, and feel successful. By not leveraging one-to-ones, organizations are missing an incredible opportunity to reduce burnout and positively impact the employee experience.



LEADER EXPERIENCE—ANDY GROVE, DAVID CANCEL, AND ED CATMULL

How do senior leaders at leading companies feel when it comes to one-to-one meetings?⁶

“90 minutes of your time can enhance their quality of work for 2 weeks, or 80+ hours. The most important criterion governing matters to be talked about [in one-to-ones] is that they be issues that preoccupy and nag the employee.”

—Andy Grove, co-founder and former CEO, Intel

“We have this religion that everyone has one-to-ones on the team. We think everyone should be doing it. It just leads to a happier workplace and it takes almost no investment. It really pays off.”

—David Cancel, former CPO, Hubspot

“You needed to show your people that you meant it when you said it...not just saying that we did, but proving that we did by the actions we took. We were protecting the culture.”

—Ed Catmull, co-founder and former president, Pixar

“My one-on-ones look like this with a lot of mentorship, and I feel so excited about going to work. I’m a lifer at my company and these regular one-on-ones are contributing to that. It would make me more enthusiastic about going to work and having the company in my future. In 10 years I wouldn’t think about being somewhere else because the culture would be different.”

—FOCUS GROUP PARTICIPANT

CONSTRUCTIVE CULTURES PERFORM BETTER

Based on 40 years of research, the Organizational Culture Inventory® (OCI) from Human Synergistics measures the relative strength of norms and expectations for Constructive, Passive/Defensive, and Aggressive/Defensive behaviors in organizations. Constructive norms encourage positive interactions and fulfillment of higher-order satisfaction needs. Passive norms prioritize self-protection and security, while Aggressive norms emphasize self-promotion and status. Viewed as ideal across industries and around the world, constructive cultures promote members' motivation and engagement, teamwork and cooperation, and organizational adaptability and sustainability.

O.C. Tanner and Human Synergistics partnered to understand how the Talent Magnets™ support a constructive culture. The results are spectacular:

4x	increase in the probability of a constructive culture when the organization has a clear purpose
2.5x	increase in the probability of a constructive culture when organizations ensured opportunities were available for all employees, not simply “favorite” ones
2.5x	increase in the probability of a constructive culture when organizations broadcast the successes and accomplishments of people within the organization
3x	increase in the probability of a constructive culture when recognition practices are consistent across the organizations

Why support a constructive culture? Simple: employees were 4x more likely to be engaged in a constructive culture.

Not only does leadership have a significant impact on the employee experience, but it also dramatically supports a constructive culture. The easiest way to start? Building trust. When employees strongly trust their leader, there is a 250% increase in the probability of a constructive culture. One-to-ones play an active role in facilitating trust: frequent one-to-ones increase trust by 29%.⁷

ONE-TO-ONES—4 KEY TAKEAWAYS

One-to-one meetings are a point of connection between employees and their leaders

Co-created, informal one-to-ones are the most meaningful

One-to-ones should happen frequently and not be too structured

Agendas should include time for development, recognition, and mentorship

One-to-ones Sources

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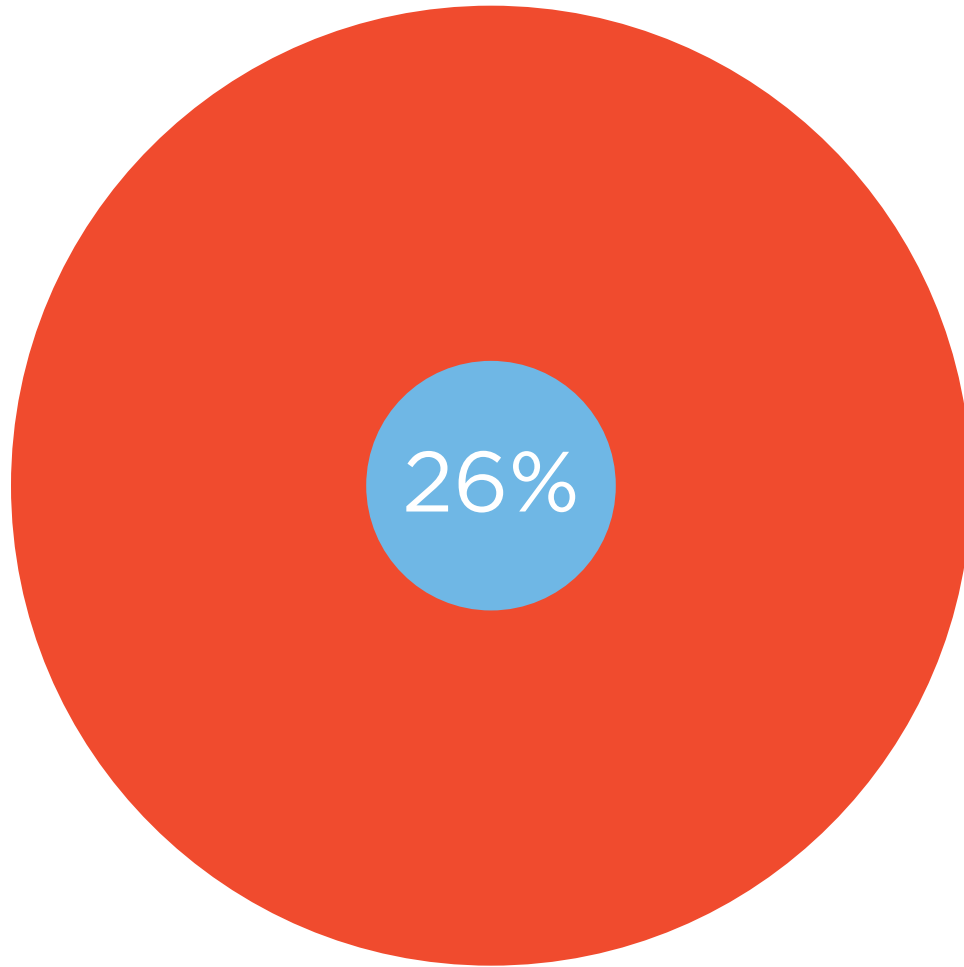
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Teams



Thriving teams are built on autonomy and psychological safety. Great leaders create this environment of trust.





**ONLY 26% OF EMPLOYEES FEEL THEIR TEAM
WORKS SEAMLESSLY TOGETHER**

Our research shows that leaders and employees equally seek high autonomy and psychological safety. Yet, they are often absent within organizations. High-functioning teams need both to succeed. This requires a commitment from leaders and team members alike. Furthermore, high-performing teams conduct peer-to-peers—thoughtful conversations with other team members to share feedback, support development, and grow together. Leaders can nurture autonomy through a shared leadership model where team members feel like they influence the work at hand. In a workplace where meaningful interactions are at the heart of the work, psychological safety becomes an abundant resource to support a thriving team.

Team members are just as influential as leaders in affecting the daily employee experience, but team dynamics are often overlooked in initiatives to improve company culture. An employee's team is fundamental to their wellbeing, engagement, and likelihood to stay. Teams must be safe, empowering places for all employees. Best practice teams have 57% lower odds of moderate-to-severe burnout.

Unfortunately, like leadership, teams are currently not as effective as they could be—only 26% of employees feel their team works together seamlessly. While 60% say their teammates are at least somewhat respectful of each other, only 28% of teammates are willing to let others lead a project, and only 19% report that their teams ensure credit is given to deserving members.

This is not an environment conducive to collaboration, innovation, or great work.

TWO ESSENTIAL CHARACTERISTICS OF THRIVING TEAMS

In our research, we've uncovered two essential characteristics of thriving teams:

1. A strong sense of autonomy

Autonomy means to be able to act independently. Employees in the modern workplace thrive on autonomy. But that doesn't mean each individual works independently from the others. Instead, the team is granted autonomy as a whole. They can set goals, make decisions, and decide what projects to do and how to do them with little or no leader involvement. People crave autonomy, because no one likes to be told what to do. And the outdated traditional management practices of factories last century that tell people what to do and how to do it, no longer apply to the modern workforce.

In his book, *Drive*, Daniel Pink reveals four decades of research showing that humans are most motivated by the desire to direct their own lives.¹

Autonomy isn't a modern desire; people are just finally talking openly about it at work.

Our findings suggest that there are six elements to creating autonomy within the team at work:

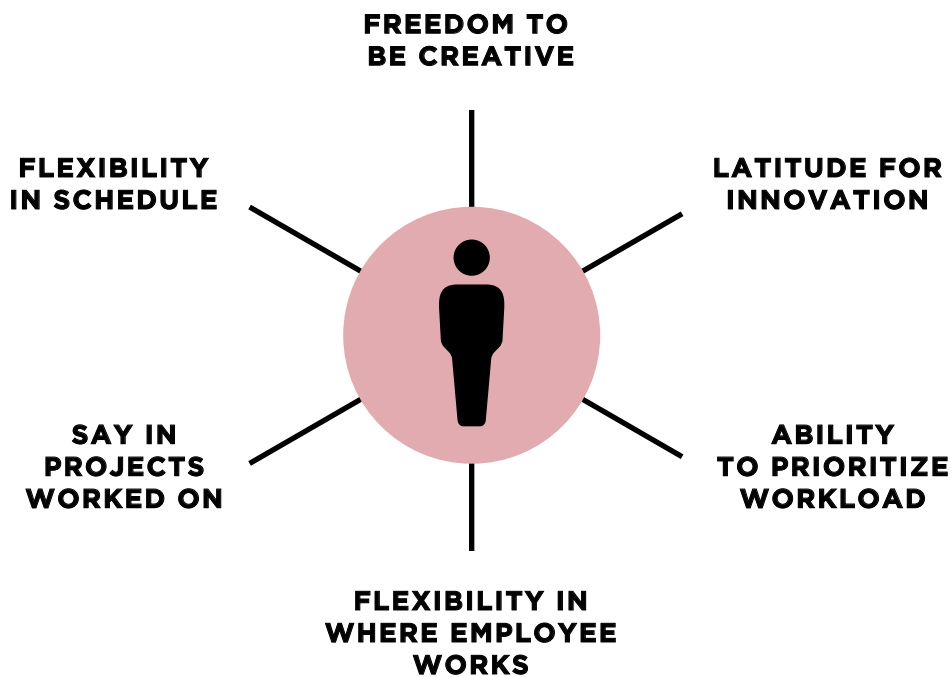


Figure 10. ELEMENTS OF AUTONOMY
Six freedoms that foster employee independence.

Flexibility is a significant part of autonomy—giving employees the choice of when, where, and how they work. Work/life integration can provide this feeling of choice, but what it really takes is freedom. Freedom to create, take risks, innovate, select preferred projects, and identify what’s most important. Giving teams this flexibility and freedom sets them up for success. They feel a stronger sense of ownership, are more motivated, and more likely to innovate. With the freedom to own their own decisions, autonomous teams are more likely to take risks and improvise to achieve the best outcome.

This type of trust in employees is powerful. The 2016 edition of *The How Report* finds that organizations where employees are more “self-governing” (in other words, they act as leaders regardless of their role or job title) outperform their peers in market share, customer satisfaction, engagement, and long-term business sustainability. They also found that 99% of employees in these types of companies would recommend their employer as a great place to work, compared to 31% in “blind obedience” organizations.² A study in the *Journal of Managerial Issues* supports this line of thought, showing that autonomy and the freedom to determine how employees did their jobs played a large role in getting the most effort from employees.³

“Our primary initiative this next year is to make sure that work is designed around that person’s work/life needs. I believe it will have a discernible impact on people’s freedom to be able to live the lives that they want to, to be able to come to work when they are ready to come to work, and to leave work when they’re ready to leave work. We very much need to stop assessing people on the [hours] they’re behind their desk and more around their productivity, performance, and their output.”

—SENIOR VICE PRESIDENT, HR

Gallup⁴ finds a correlation between autonomy and increased performance and engagement, but also with an uptick in the sensitivity to failure. While teams prefer the flexibility and freedom of independence at work, they still need leaders to support them during challenging and stressful situations. Leaders can't micro-manage, but they can't disappear either. They should serve as mentors, guiding and supporting their teams with resources and help as needed. Leaders are asked to keep their teams accountable, ensure goals are met, and that the team is functioning efficiently.

Currently, 37% of employees report having high autonomy at their organizations, 40% have a medium level of autonomy, and 23% have low autonomy. The impact of autonomy on employee experience, burnout, and workplace culture is compelling: employees who have a high sense of autonomy are 2-3x more engaged, much more likely do great work, have a good employee experience, and have less burnout than employees who have a medium or low sense of autonomy.

Team dynamics can also influence autonomy. Team members must be able to collaborate and be willing to share both their successes and their failures. When there's a strong sense of working together to achieve and innovate, there is a 30% greater chance of individual employees feeling like they have autonomy in their role.

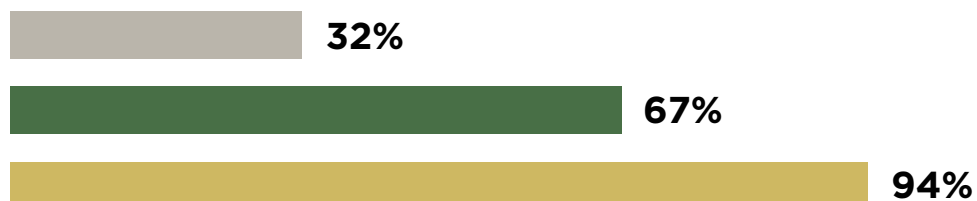
Team members must also support and listen to each other, rather than compete with one another or work in silos. Teams that do both well see a 33% and 34% greater chance of high autonomy.

Innovating, succeeding, and failing together can strengthen team bonds and create a well-defined team identity that fosters a high sense of autonomy.

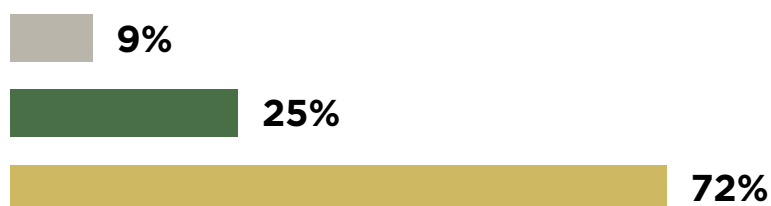
Effects of Low, Medium, and High Autonomy on Employee Experience

■ LOW ■ MEDIUM ■ HIGH

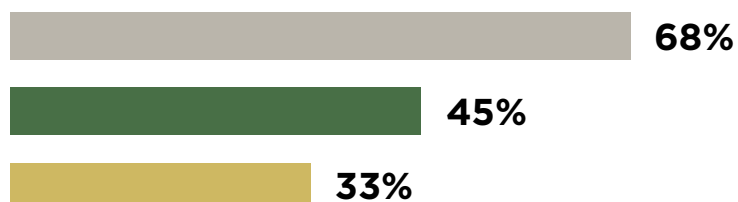
Engagement



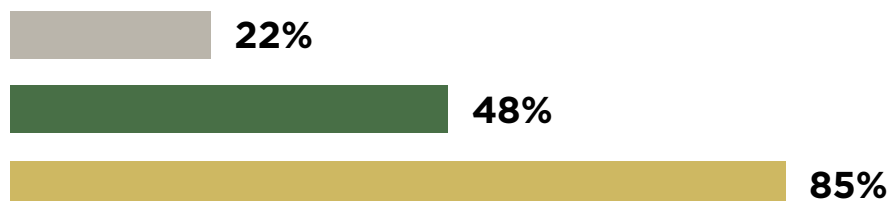
Incidence of great work



Incidence of moderate-to-severe burnout



Have a favorable employee experience





BEST PRACTICE—ATLISSIAN

Atlassian has been named one of the best places to work in Australia several times over. A big reason for those accolades has been the company's approach to autonomy. Four days a year, Atlassian asks their employees to drop their normal work and spend time on any creative project they want. No limits. This policy has produced countless innovative results, including new product features and even a mini-arcade in their office. They've also created a system of giving each other "kudos" on handwritten cards and gifts in recognition of great work. Daniel Pink cites Atlassian as a prime example of how autonomy is better at encouraging creativity than any financial incentive.⁵

2. A strong sense of psychological safety

The basic definition of psychological safety (Kahn 1990⁶) is “being able to show and employ one’s self without fear of negative consequences of self-image, status, or career.” When employees feel emotionally safe at work and with their teams, they can take risks, innovate, share new ideas, and be themselves without worrying about being criticized or ostracized by their peers.

Employees are often hesitant to bring up new or radical ideas, fearing rejection. This hampers organizations, as a diversity of ideas and perspectives is key to team and company success. By only allowing thoughts and ideas that are safe or mainstream, companies miss out on a host of opportunities for improvement and innovation.

Interestingly, autonomy is an antecedent to psychological safety. When teams are given more latitude and flexibility to be creative and do things in new ways, they feel safer to take risks and speak up. No one wants to bring a new idea to the table if the company is always telling people what to work on and how to do their work. Even with only a medium sense of autonomy, there is a 200% greater chance of employees feeling psychologically safe. When they have high autonomy at work, the odds rise to a whopping 586%.



EDMONSON AND PSYCHOLOGICAL SAFETY

Psychological safety wasn't generated by Millennials or Generation Z. The term originated in the late 1990s, when medical mistakes at hospitals were becoming an epidemic. At the time, researcher Amy Edmondson had been studying the performance of various hospital teams. Her big question was: Do better teams make fewer mistakes? According to her research, the most solid teams actually reported making the most mistakes. Did that mean the best teams in the hospital made more mistakes than their peers? Not exactly. They were simply more willing to talk about them—because they felt psychologically safe. This research became Edmondson's influential 1999 paper, *Psychological Safety and Learning Behavior in Work Teams*. “The term [psychological safety],” says Edmondson, “implies a sense of coziness—you know, ‘Oh, we’re all going to be nice to each other,’ and that’s not really what it’s about. It’s about candor. It’s about being direct, taking risks, being willing to say, ‘I screwed that up.’ And being willing to ask for help when you’re in over your head.”⁷

Feeling like you can take risks and think outside of the box contributes to a great company culture. But culture can also detract from a sense of psychological safety. Company cultures where employees are stressed, overworked, unrecognized, and uninspired aren't conducive to an environment of safety. Without work/life balance, employees won't feel the company cares about their wellbeing, and there's an associated 26% decrease in psychological safety. A lack of peer-to-peer recognition is also a detriment to culture—when employees don't feel their opinions or ideas are valued, there is a 37% decrease in feeling emotionally safe at work. And if employees don't feel like their organization positively affects the lives of others—has a weak or no purpose—there is a 31% decrease in the odds they'll feel psychologically safe. After all, why would employees speak up if they don't feel like their work matters?

Leaders play a big role in building psychological safety. A study published in the *Journal of Organizational Behavior* found “if a leader takes an authoritarian, unsupportive, or defensive stance, team members are more likely to feel that speaking up in the team is unsafe. In contrast, if a leader is democratic, supportive, and welcomes questions and challenges, team members are likely to feel greater psychological safety in the team and in their interactions with each other.”⁸

The fear of speaking up is common and evident in the results for Passive/Defensive norms like accepting the status quo, not rocking the boat, going along with others, and never challenging superiors. Support a constructive culture by increasing peer-to-peer recognition: the probability of a constructive culture increases by 2.5x. Peer-to-peer recognition strengthens connection between employees and increases psychological safety.

—O.C. TANNER AND HUMAN SYNERGYSTICS⁹



Companies have yet to realize psychological safety has great returns. When employees feel psychologically safe at work, there is a:

347% increase in the probability of highly engaged employees

277% increase in the probability of a highly rated employee experience

154% increase in the incidence of great work

33% decrease in the incidence of moderate-to-severe burnout

Together, strong autonomy and psychological safety create an environment conducive to supercharged team interaction. When teams have a high sense of autonomy and psychological safety, we see a:

205% increase in the odds an employee will be a promoter of the organization

443% increase in the odds an employee will have a strong sense of opportunity

433% increase in the odds an employee will have a strong sense of wellbeing

287% increase in the odds an employee will have a strong sense of appreciation



BEST PRACTICE—GOOGLE

Even the algorithms prove it. Google has spent millions measuring nearly every aspect of its employees' lives. This makes sense. The company is built on studying algorithms and trends. And, in 2012, the company's top executives embarked on an initiative named Project Aristotle. The goal of the project was to study hundreds of Google's teams and figure out why some teams thrived while others struggled. After studying the groups for more than a year, analyzing everything from how much time employees spent together outside of work, to various personality styles with each team, to how much time each team member spoke during meetings, and what people talked about during those meetings, Project Aristotle researchers finally discovered the only common threads among the best teams—a concept known as psychological safety. Basically, psychological safety can be defined as a sense of confidence that the team will not embarrass, reject or punish someone for speaking up. Google's data indicates that psychological safety, more than anything else, leads to a successful team¹⁰.

GREAT LEADERS BUILD GREAT TEAMS

Leaders play a pivotal role in building both a sense of autonomy and psychological safety on their teams. They set the tone and expectations for how the team functions.

Leaders who micromanage their teams, set goals for (not with) their teams, are rigid in how and what the teams work on, need to approve or make every decision, and use traditional leadership practices will not build autonomous teams. Similarly, managers who create a workplace environment that stimulates favoritism, fear, and conformity will not have teams who feel psychologically safe.

However, leaders who treat their team members as people, who communicate so that all members are aware of what others are working on, who foster collaboration and encourage employees to actively contribute to each other's projects, and who support the development of everyone, will build teams that thrive. After all, great leaders know their teams are collectively smarter than them and don't always need to be told what to do. They just need guidance.

Successful leaders inspire. They mentor. They trust. They connect. They rally their team around a common purpose. They help their team succeed and celebrate their accomplishments. And they connect their people with each other, nurturing strong team bonds. When people feel connected to their organization, their leader, and their team, they feel psychologically safe, have a better understanding of how to succeed, and feel empowered to go out and do great work.

“Teamwork is the ability to work together toward a common vision. The ability to direct individual accomplishments toward organizational objectives. It is the fuel that allows common people to attain uncommon results.”

—ANDREW CARNEGIE

When leaders connect people to their organization's purpose, teams understand what they need to do to fulfill that purpose and feel inspired to do so. They have a shared goal, a shared mission, and will be more likely to accomplish it together.

Companies with leaders who connect people to purpose have:

912% greater odds the employee will feel they have autonomy

347% greater odds of having psychologically safe teams

When leaders connect their people to accomplishment, teams know what success looks like and feel empowered to achieve it. As a result, there are:

713% greater odds that an employee has medium or high autonomy

343% greater odds of having psychologically safe teams

When leaders connect their people to one another, they build an environment of trust in team members, and see a:

1,079% greater odds that an employee has medium or high autonomy

363% greater odds of having psychologically safe teams



BEST PRACTICE—MULTINATIONAL RESCUE TEAM

In 2018, members of a youth soccer team in Thailand got trapped in a deep cave that flooded, preventing their escape. As the world watched in horror, a multinational rescue team was formed to try and save the boys. The rescue team had to quickly think of new, out-of-the-box, often risky ideas, including drilling down into the cave and pumping the water out to allow the boys to walk out. The rescue was so dangerous and challenging that a former Thai Navy SEAL lost his life trying to save them. With time running out, each member of the rescue team not only had to brainstorm, but also analyze and consider every idea that was contributed in real time. The rescue team had to be a psychologically safe place where all ideas were taken seriously, no matter how unconventional they might seem, in order to come up with a solution. The creative thinking, openness to new ideas, collaboration, and support eventually led to the formation of a plan that successfully rescued every member of the boys soccer team, much to the relief of the world.¹¹

RECOMMENDATIONS & IMPACT

Leaders can build thriving teams by ensuring their people feel safe, empowered, connected, and valued.

1

Create a sense of autonomy by connecting employees.

While having trust in your team is fundamental to building a sense of autonomy, leaders can take more proactive steps to help employees feel connected to their teams and leaders in the organization.

Leaders must cultivate strong relationships with and between each team member. Autonomy is only possible when the team can work together. When teams have strong bonds with one another and their leader, there is 42% greater odds team members will feel they have high autonomy.

Leaders must also connect employees with opportunities to grow, develop, and work on special projects. As employees create and work on things outside of their immediate job role, their sense of autonomy increases. Our research shows that when employees feel they can take advantage of these unique opportunities, there is a 33% greater sense of high autonomy.

And finally, make others aware of employee accomplishments, for when you do, there are 45% greater odds the employee will have high autonomy. Successful teams will be seen as subject matter experts in their area and valued for skills and talents they can use in new ways. Be sure to recognize team members' contributions in their team and with the wider organization. Share stories of success in company meetings, newsletters, emails, social platforms, and on public screens. Spread the word of employee accomplishments. The result? Employees will feel inspired to go out and do more great work.

“Individual commitment to a group effort—that is what makes a team work, a company work, a society work, a civilization work.”

—VINCE LOMBARDI

Foster transparency, openness, and team identity.

Only when team members are willing to be honest, communicate well, and grow with each other, will they have a strong sense of psychological safety. Leaders should actively work to ensure all members feel a strong sense of team identity.

Leaders and team members should also know the roles of every individual on the team. How does each member contribute? What does their workload look like day to day? Make sure each team member knows their job has meaning and that they are valuable. Doing this leads to a 93% increase in the odds of psychological safety.

Decide as a team how tasks are distributed. When teams prioritize work and tackle projects together, they strengthen collaboration, purpose, and belonging. This contributes to an 88% increase in the odds of having a psychologically safe workplace.

Hold an honest review as a team after every major project. Team members must experience success and failure as a team, not individually, so everyone feels accountable and no one is singled out. They should be willing to give and receive honest, critical feedback to make the team stronger. When these things are done, there is a 55% and 91% increase in the odds of psychological safety, respectively.

“Remember, teamwork begins by building trust. And the only way to do that is to overcome our need for invulnerability.”

—PATRICK LENCIONI

3

Utilize peer-to-peer conversations.

Development is not just a leader’s responsibility. Deliberate time spent interacting with peers can contribute greatly to an employee’s development and experience, but it also increases trust and authenticity among team members. Just as one-to-ones deepen connections between leaders and employees, peer-to-peers can strengthen connections with peers.

Peer-to-peers can be individual or with the whole team, and should focus on how the employee can develop, innovate, and grow. They can cover a wide variety of topics, including:

- **Introducing a peer to another colleague or someone within their network**
- **Learning a new skill**
- **Asking for or providing feedback**
- **Asking for help**
- **Brainstorming a new idea**
- **Inviting a peer to work on a special project**

The key to a successful and not overly critical peer-to-peer conversation is that it happens in the moment and from a place of positive intent. They should not always be associated with failure and should be intentional and well thought through.

Deloitte's study on inclusion found that "Organizations need to get teams to capitalize on the various forms of knowledge their members bring." The study suggests a culture where senior employees provide guidance and mentorship while junior employees provide new perspectives and exposure can result in a "cross-generational dialogue that could foster appreciation and empathy."¹² By sharing knowledge and expertise, team members can help each other grow.



**When companies encourage peer-to-peers,
they see incredible results:**

**320% increase in the odds an employee will have a
strong sense of success at the organization**

**331% increase in the odds an employee
will be highly engaged**

**206% increase in the odds an employee
will perform great work**

**325% increase in the odds an employee
will highly rate their employee experience**

**67% lower odds of employees
experiencing moderate-to-severe burnout**

**6X greater odds of having a thriving
workplace culture**

**4X greater odds of having
an exceptional employee experience**

**3X greater odds of having Promoters
on the Net Promoter Scale**

2X greater odds of retaining employees

Peer-to-peers typically happen in highly autonomous and psychologically safe environments. Peers will not be comfortable having one-to-ones with each other if they do not feel safe enough to be honest and speak up. Nor will they provide helpful feedback if there's not an environment open to change and creativity. It's no wonder that high psychological safety and autonomy increased the odds of team members holding peer-to-ones by 867%.

Research from Harvard University found that giving or receiving peer-to-peer negative feedback rarely leads to improvement.¹³ Team members that received negative feedback would rather avoid the coworkers that gave them the feedback and build new relationships with those who complimented them (a prime example of confirmation bias). The only time negative feedback worked? When the recipient feels valued by the giver.

It bears repeating: Teams that thrive feel a strong sense of autonomy and psychological safety. Their leaders allow them to be themselves and feel free to go out and share their greatness. As the workplace evolves and organizations change, autonomous, psychologically safe teams will be quicker to successfully adapt. Their leaders must be agile and forgo traditional leadership practices, as comfortable as they may seem.

TEAMS—4 KEY TAKEAWAYS

Autonomy and psychological safety are important characteristics of thriving teams

Teams feel autonomous when there is flexibility and freedom to create

Psychological safety means employees can voice opinions and ideas without fear

Great leaders build great teams by connecting their people to each other, using tools like peer-to-peers

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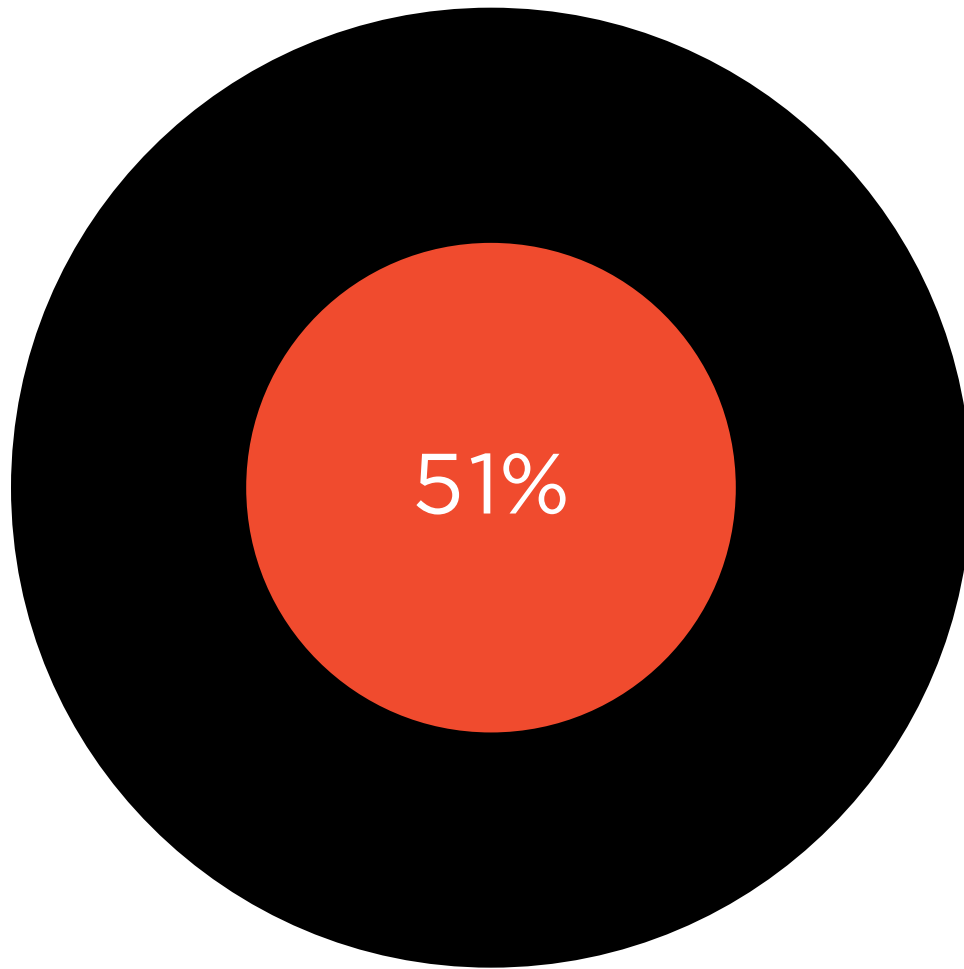
6

Listening



Employee listening is not a “check-the-box” exercise. Active listening is different from just hearing employee feedback.





**ONLY 51% OF EMPLOYEES THINK THEIR ORGANIZATION
IS GREAT AT LISTENING TO EMPLOYEES**

For too long, the annual employee survey has reigned as the listening modality of choice—often used in isolation with little post-survey action or communication. Pulse surveys fare no better. Leaders need to move away from merely gathering employee feedback and instead begin to authentically listen and act on what they learn. Each listening opportunity either increases or decreases the employee experience. Research shows it's best to use a mix of at least five different modalities of listening continuously throughout the year. Then, by proactively communicating feedback, action, and results along the way, organizations can improve listening and the employee experience simultaneously.

The annual employee survey has lost much of its luster for employees. Used year after year without much thought, it's become little more than a mechanism for rating and ranking, not listening. Organizations have tried to "modernize" the annual survey by changing up the questions or switching to pulse surveys, but they both do the same thing: rate and rank, but rarely listen. Getting feedback from employees has become a "check the box" exercise, rather than an intentional method to improve culture.

THE ANNUAL EMPLOYEE SURVEY IS INEFFECTIVE

Soliciting employee feedback solely through the annual survey has led to greater dissatisfaction and damaged the employee experience. The results are abysmal when companies only use an annual survey to collect employee feedback:

51% of employees are satisfied with the process of collecting feedback

63% of employees are satisfied with the employee experience

66% of employees would leave for a similar job

A net promoter score of -30

“We have a set of questions to answer and it’s the typical ‘do we have the tools to do our job,’ ‘did we receive the training we need,’ etc. There’s a lot of questions to answer...and I don’t even answer it anymore. It is like they want to tick the box, but they don’t care what I have to say.”

—FOCUS GROUP PARTICIPANT, UK

More often than not, annual employee surveys alone are inaccurate, as employees won't provide honest, informative feedback out of fear they will suffer negative consequences. Many don't fill out the survey at all because they believe nothing will change. Fact is, 1 in 3 employees feel like the organization retaliates against those who provide feedback, and 1 in 4 employees feel ignored when they share their feedback. And 34% of employees think their company doesn't listen to their ideas for improving the business.¹ Companies are getting inaccurate feedback, making changes based on that incorrect feedback, and are left wondering why their numbers are so difficult to improve.

“I feel powerless. My company asks for my feedback. My leader asks for my feedback. They do nothing with it. It is like they just want to say they asked for feedback.”

—FOCUS GROUP PARTICIPANT, AUSTRALIA

THE SOLUTION IS LISTENING

hear *v.* To be told or informed of.

listen *v.* To take notice of and act on what someone says; respond to advice or a request.

Listening is more than just asking for feedback. It includes acting on what you are hearing. There are multiple elements to listening: receiving the feedback through multiple modalities, communicating the results, taking visible action, and broadcasting the changes widely.

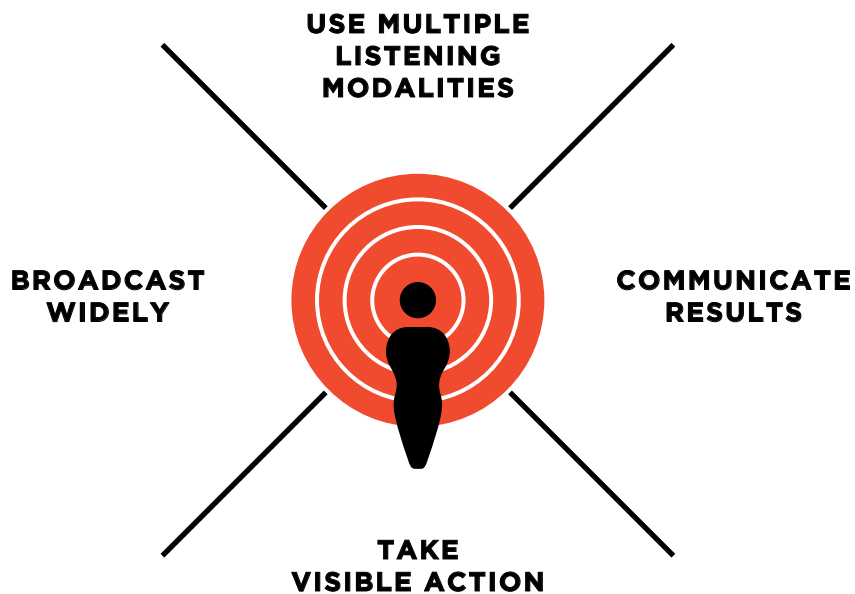


Figure 11. EFFECTIVE LISTENING MODEL
Listening is a four-way street.

Active listening should happen far more than once a year. Forward-looking organizations regularly use multi-method listening strategies to hear, respond to, and act on feedback from employees. It's a practice that is embedded within the culture of an organization through multiple avenues, and done by multiple people within the organization, not just HR.

Frequent active listening is a critical ingredient in daily employee experiences. You need to listen to employees through pulse surveys, one-to-ones, focus groups, town halls, team meetings, skip-level meetings, dedicated suggestion boxes, a dedicated employee for listening, social media platforms, exit interviews, internal communication, and collaboration tools—every day and in every interaction. It's a daily practice. Deloitte found the biggest challenge in employee engagement initiatives is, “shifting from a transactional, once-a-year mind-set, to an ‘always on,’ continuous listening approach to monitoring engagement.”²

As you might expect, leaders play a crucial role in active listening. Only 51% of employees think their organization is great at listening to them, and only 56% of employees feel their leaders stay in touch with what employees need. Leaders are the first people employees go to when they have ideas or need answers, resources, guidance, and support. They are the first line of defense when it comes to active listening.

A group of diverse people in a meeting, overlaid with a blue tint. The image shows several individuals in a professional setting, possibly a conference room or office, engaged in conversation. The overall tone is collaborative and focused.

BEST PRACTICE—GOOGLE AND MICROSOFT

Even the giants are listening—because they understand that some of the smallest voices might have the biggest ideas. Google, for example, holds weekly townhall meetings, which include a Q&A with the CEO. In fact, Lazlo Bock, the former Senior Vice President of People Operations said, “Everything is up for question and debate, from the trivial... to the ethical.” The CEO of Microsoft, doesn’t shy away from listening either. The company holds monthly Q&A sessions with employees and broadcasts the conversations. While employee listening might seem like a huge undertaking, especially at large organizations, these tech giants are proving that all voices matter.³



LEADER EXPERIENCE—PAUL BENNETT, CHRISTINE RIORDAN, AMY JEN SU

What do senior leaders think about active listening?

“Listen more. For most of my twenties I assumed that the world was more interested in me than I was in it, so I spent most of my time talking, usually in a quite uninformed way, about whatever I thought, rushing to be clever, thinking about what I was going to say to someone rather than listening to what they were saying to me.”

—Paul Bennett, Chief Creative Officer at IDEO

“To be able to motivate and inspire others, you need to learn how to listen in both individual meetings and at the group level.”

—Christine Riordan, Leadership Coach and President of Adelphi University

“As a leader, you need to have a strong voice and you need to know when it’s time to listen,”

—Amy Jen Su, Co-founder of Paravis Partners

Organizations on Fortune's 100 Best Companies To Work For list know the importance of listening. "Enhancing communication to promote transparency and idea-sharing via virtual and face-to-face methods" was the top cultural priority for these best places to work companies. This includes having leaders who are available for feedback and share important information with employees, as well as actively asking for ideas on how to improve. The increased transparency and inclusion leads to a fairer and better employee experience.⁴

“When my organization attentively listens, each person can more effectively respond with objectiveness, fairness, positivity, growth, and understanding.”

—FOCUS GROUP PARTICIPANT, CANADA

A comprehensive listening program also impacts employee burnout. Simply having a multi-method listening strategy in place decreased burnout incidence by 28%. A strong listening strategy with multiple methods, communication, and action decreased the odds of employees experiencing moderate-to-severe burnout by 54%. On the flip side, when leaders dismiss employee opinions and ideas, 38% of employees become unmotivated.⁵

Listening goes hand in hand with psychological safety. Employees will not voice their opinions or suggest new ideas if they fear retaliation or ridicule from the company, leaders, or peers. In fact, 20% of ideas are never heard because employees are afraid to offer them up⁶, and one-half of employees don't speak their minds at work.⁷ Giving feedback is a risk that employees decide to take—do they want to upset their leaders, who have established a specific structure, process, or culture? Empirical research found that employees want to speak up with ideas, opinions, and solutions that can improve their organizations, but usually are too afraid to do so. The evidence shows that speaking up impacts both organizational effectiveness and leads to high-quality decision making.⁸ In other words, companies can't improve or succeed if employees don't speak up, and employees won't speak up unless it's safe to do so.



When companies use active, multi-method,
frequent listening, there is a:

216%

increase in the odds an employee will have
a strong sense of opportunity

281%

increase in the odds an employee will have
a strong sense of success

231%

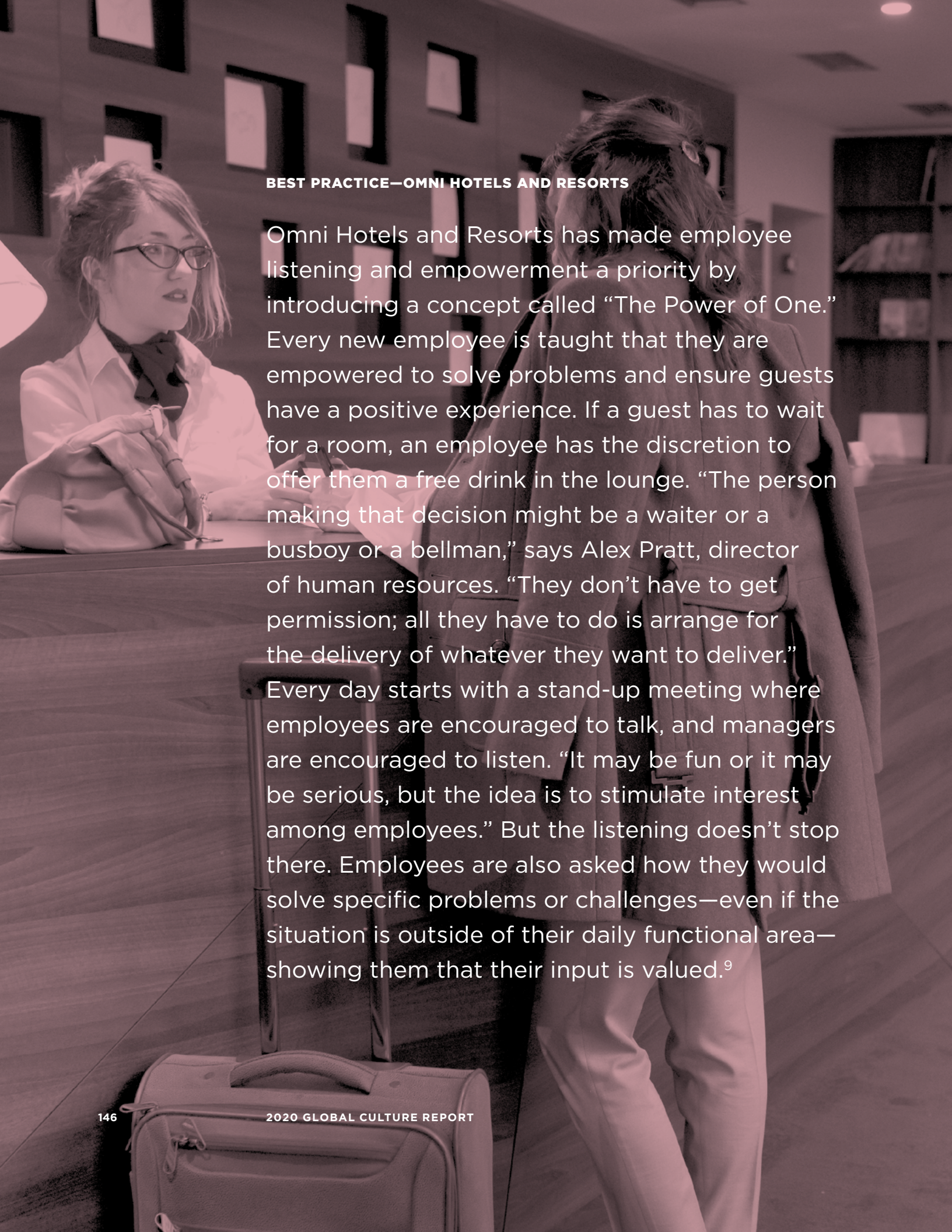
increase in the odds an employee will have
a strong sense of appreciation

334%

increase in the odds an employee will highly
rate their employee experience

1,250%

increase in the odds an employee
will be highly engaged



BEST PRACTICE—OMNI HOTELS AND RESORTS

Omni Hotels and Resorts has made employee listening and empowerment a priority by introducing a concept called “The Power of One.” Every new employee is taught that they are empowered to solve problems and ensure guests have a positive experience. If a guest has to wait for a room, an employee has the discretion to offer them a free drink in the lounge. “The person making that decision might be a waiter or a busboy or a bellman,” says Alex Pratt, director of human resources. “They don’t have to get permission; all they have to do is arrange for the delivery of whatever they want to deliver.” Every day starts with a stand-up meeting where employees are encouraged to talk, and managers are encouraged to listen. “It may be fun or it may be serious, but the idea is to stimulate interest among employees.” But the listening doesn’t stop there. Employees are also asked how they would solve specific problems or challenges—even if the situation is outside of their daily functional area—showing them that their input is valued.⁹

RECOMMENDATIONS & IMPACT

The way companies listen, communicate, and make changes based on employee feedback greatly impacts the effectiveness of asking for employee opinions.

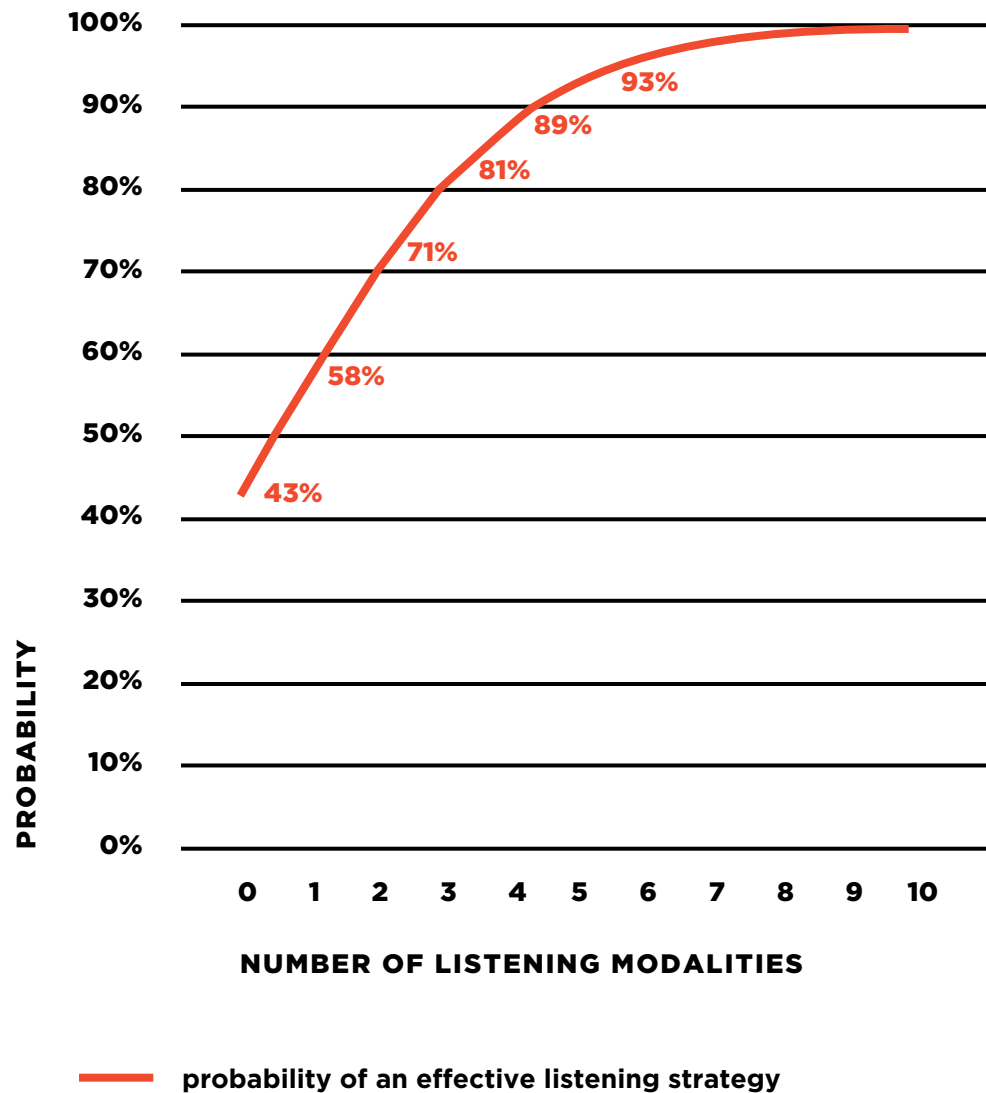
①

Use multiple modalities to get employee feedback—ideally five.

An IBM study found HR leaders who use multiple listening methods rated their organizational performance and reputation 24% higher than those who don't.¹⁰

We examined the effect of the number of listening modalities on various outcomes and found a magic number: five. Utilizing five modalities has a significant impact on employee perception, but after five, the probability of favorable results flattens, and you get less bang for your buck.

Effect of the Number of Listening Modalities on an Effective Listening Strategy



Our research indicates some modalities are more effective than others. Dedicated ways to listen to employees (in focus groups or through a dedicated employee for listening) has a greater impact on satisfaction with the feedback process.

METHOD OF LISTENING	IMPACT ON PROBABILITY OF SATISFACTION WITH EMPLOYEE FEEDBACK PROCESS
Focus Groups	105%
Dedicated Employee	88%
Suggestion Box	79%
Townhall	74%
Team Meeting	73%
One-to-one	56%

2020 GLOBAL CULTURE STUDY, O.C. TANNER INSTITUTE

“If you want to change your culture, you need to be transparent about what people are saying because that definitely surfaces all of the genuine stuff that’s on people’s minds that they’re unhappy about, and you have to fix that.”

—CHIEF PEOPLE OFFICER

2

Communicate results publicly and through multiple modalities.

About 70% of organizations are communicating the results of employee feedback, but only 30% are using multiple modalities of communication. A diversity of vehicles here is also essential and can be very impactful.

METHOD OF COMMUNICATING ABOUT FEEDBACK RECEIVED	IMPACT ON PROBABILITY OF SATISFACTION WITH EMPLOYEE FEEDBACK PROCESS
Email	+74%
Posters	+84%
Department Meeting	+73%
Company Meeting	+90%
Team Meeting	+81%
One-to-one	+85%

2020 GLOBAL CULTURE STUDY, O.C. TANNER INSTITUTE

Communication has a significant effect on people feeling heard. When results are communicated with employees, there is a:

148% increase in the probability of employees feeling like their organization is great at listening to employees

112% increase in the probability of employees feeling like leaders stay in touch with what employees need

189% increase in the probability an employee feels appreciated

“If you’re trying to create a high-trust organization, an organization where people are all-for-one and one-for-all, you can’t have secrets.”

—JOHN MACKEY, CEO WHOLE FOODS

3

Take action within three months of receiving feedback.

Actively taking steps to address employee feedback is critical. Why would employees bother giving feedback if nothing is done with it? Learning that one-half of organizations take longer than six months after communicating results to take action on feedback, and only 64% ever address it, isn't comforting. But it does hint at the depth of the problem.

The good news is that when companies do make changes based on the feedback they receive, employees are 358% more likely to be more satisfied with the feedback process and 133% more likely to have a favorable perception of leadership.

Timing plays a role, as well. When organizations make visible changes within three months of communicating feedback results, they see drastic improvements in the employee experience, engagement, and company culture:

OUTCOME	IMPACT OF MAKING A VISIBLE CHANGE WITHIN THREE MONTHS
Employee Experience	+66%
Purpose	+54%
Opportunity	+97%
Success	+74%
Appreciation	+66%
Wellbeing	+31%
Leadership	+68%
Chance of Burnout	-23% (decreased odds)
Retention	+39%
Engagement	+89%
Promoter	+77%

2020 GLOBAL CULTURE STUDY, O.C. TANNER INSTITUTE

The faster change follows feedback, the larger its impact. Our research demonstrates that making changes within one month has an even more significant effect:

804% increase in the probability of feeling like the organization is great at listening to employees

306% increase in the probability that the employee will trust the organization to do what is right, even if it causes problems in the short term

203% increase in the probability that the employee will feel like their ideas are taken seriously by the organization

Communicating change is almost as important as the change itself. Taking steps to improve is only effective if employees are aware of what was done to address their feedback. Be specific about what actions you took and why you took them. Connect improvements made to the feedback received and how it impacts the employees who gave it.

Employee listening can't be a "check the box" exercise. Nor can it be left up to an annual survey. Companies that want to help employees thrive must build workplace cultures that embed active listening throughout the employee experience. It's not the job of pulse surveys or suggestion boxes, it's the responsibility of all leaders at an organization. When leaders are open to feedback, listen and respond to it, and make changes quickly, employees feel a higher sense of opportunity, feel valued and heard, and experience less burnout. And companies see higher engagement, more innovation, and more passion from their people.

LEADER EXPERIENCE—1-800-GOT-JUNK

1-800-GOT-JUNK was a successful company. In 2006, under the leadership of then-COO Cameron Herold, the company had \$60 million in revenue and 200 employees. It was growing fast, but senior leaders disagreed on how to grow. The VP of Finance warned them not to spend in specific ways. “He cautioned us about our growth, but we never really listened,” says Cameron. Because the VP had a more quiet, introverted personality, he didn’t combat Cameron and the CEO’s more dominant opinions. “Because he wasn’t right in our face about it, pushing us, we let his words go in one ear and out the other.”

Since they didn’t listen to their VP, the company expanded too fast and ran out of cash. When the economic downturn hit in 2009, the company faced deep financial difficulty. Fortunately, they survived, but Cameron has changed how he approaches listening to employees. “It’s important to look for it, to know if I’ve been truly listening to them or simply placating them. And as a leadership team, we learned that we had to listen and pay attention to everyone, regardless of their communication style.”¹¹

LISTENING—4 KEY TAKEAWAYS

The annual survey, or pulse surveys, used in isolation are ineffective

Employee listening can't be a check-the-box exercise

Organizations must move from hearing to listening

Employee listening means getting feedback, communicating results of the feedback, and taking action to make changes based on the feedback

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One Last Word



Leaders are the backbone of a thriving workplace culture. How can we help them help others?



CONCLUSION

We cannot emphasize it enough—leaders are a crucial part of the employee experience and play a critical role in building thriving workplace cultures. While there are many other important influencers, few affect so many elements of the employee experience.

Our advice to organizations? Enable your leaders.

Too many leaders are promoted to their roles because they are great individual contributors. They do exceptional work. But they may not know how to lead. Some make the transition easily. Others micromanage their people, or worse, intimidate and belittle them, dictating how they do their jobs and taking credit for their success.

Great leaders inspire their people. They are influencers of great work, rather than doers. They are mentors and coaches. They know when people need guidance and when they need autonomy. They set meaningful purposes and empower their teams to fulfill them by fighting for resources. Few leaders arrive on the job knowing how to do all these things. But with the right help from their organizations, any leader can become a great leader. Here's how:

1. Provide direction for new leaders. Companies should be prepared to train new managers on modern leadership skills and the importance of things like recognition and wellbeing. Never assume they automatically know how to lead. They need coaching and mentorship, just like their teams.

2. Support leaders with the right resources. Like ongoing leadership training and development, mentorship opportunities, adequate budgets and equipment for their teams, and the technology to connect with their teams and recognize great work as it happens. Leaders shouldn't have to ask where to go when they need support. They should have the tools to succeed at their fingertips.

3. Help leaders feel connected. We expect our leaders to connect their people to a purpose, accomplishment, and one another. But do we do the same for our leaders? Make sure you are helping your leaders connect to your organization's purpose, find success, and build bonds with other leaders. Provide networking and mentorship opportunities for them so they have a chance to develop social ties.

Finally, don't forget the human element. Leaders have an employee experience, just like their direct reports. They have peak and valley experiences. They are affected by your company's culture. Remember to check in with your leaders, have one-to-ones with them, keep an eye out for burnout, and foster their wellbeing. Leadership's responsibilities will only increase as we expect them to evolve from traditional leadership to a more modern style that can inspire and engage today's (and tomorrow's) workforce. Craft a workplace culture that helps both your leaders, and their people, thrive at work.

METHODOLOGY

The O.C. Tanner Institute used a multi-method research design, employing interviews, focus groups, cross-sectional surveys, and a longitudinal survey.

Qualitative findings are derived from 16 focus groups and 108 interviews among employees and leaders of larger organizations. The groups were held in two phases: December 2018 and March 2019. Groups were conducted in Denver, CO; Toronto, CA; London, UK; and Sydney, AU. Each group represented a range of types of employers, including private companies, public companies, and government entities.

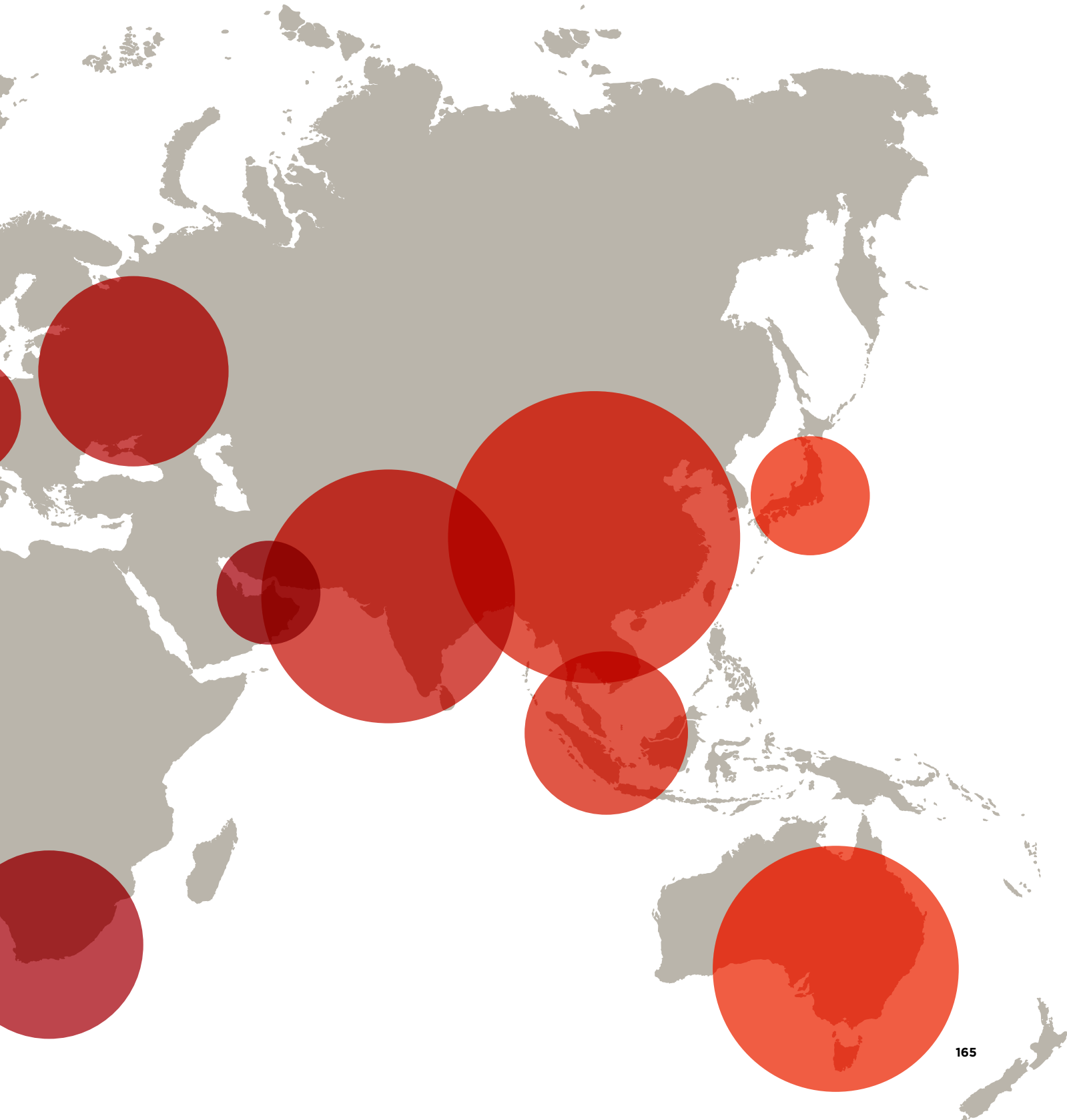
Quantitative findings are derived from online survey interviews administered to employees across Argentina, Australia, Brazil, Canada, China, Germany, India, Japan, Mexico, Russia, Singapore, South Africa, United Arab Emirates, United Kingdom, and the United States. The total sample size was 20,088 workers at companies with 500+ employees. Fieldwork was undertaken in May and June 2019. Survey data was collected and analyzed by the O.C. Tanner Institute. This sample is sufficient to generate meaningful conclusions about the workplace culture of companies in included countries. However, as we do not have population data, results are subject to statistical errors customarily associated with sample-based information.

All figures, unless otherwise stated, are from the O.C. Tanner Institute.

Global Appendix

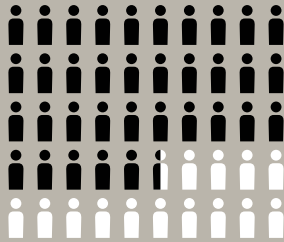
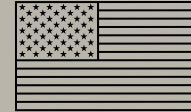


Talent Magnet index scores and workplace culture outcomes country by country.

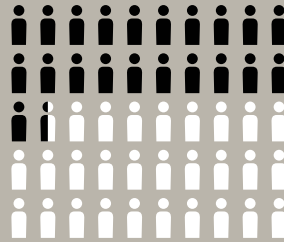


UNITED STATES

The economy in the US has been growing, with workers facing low unemployment and companies continuing to add jobs. Employees are more remote and mobile than ever before.



71%
of employees are satisfied with their current workplace culture



43%
of employees in the United States feel a sense of burnout

74%

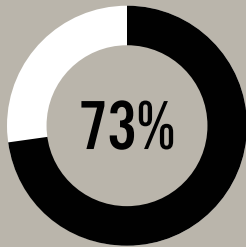
of employees in the United States are engaged

57%

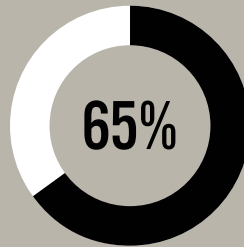
would leave for another job with similar role, pay, and benefits

USA

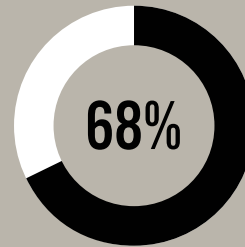
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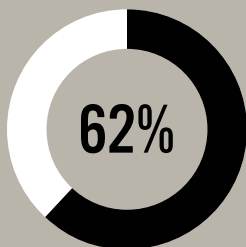
EMPLOYEE SENSE OF PURPOSE



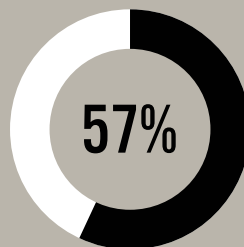
EMPLOYEE SENSE OF OPPORTUNITY



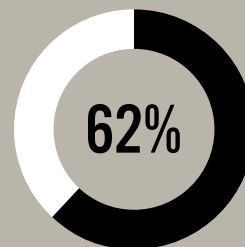
EMPLOYEE SENSE OF SUCCESS



EMPLOYEE SENSE OF APPRECIATION



EMPLOYEE SENSE OF WELLBEING



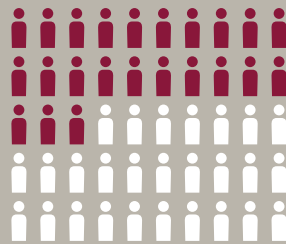
EMPLOYEE SENSE OF LEADERSHIP

CANADA

Workplaces in Canada are rapidly evolving, with a rise in remote working and gig jobs, low unemployment, and increased immigration. Canadian companies are focusing more on the employee experience and wellbeing to be more competitive and drive innovation.



68%
of employees are satisfied with their current workplace culture



46%
of employees in Canada feel a sense of burnout

69%

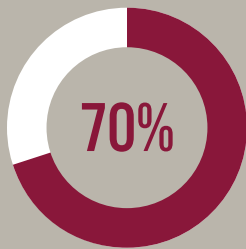
of employees in Canada are engaged

54%

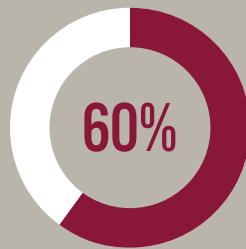
would leave for another job with similar role, pay, and benefits

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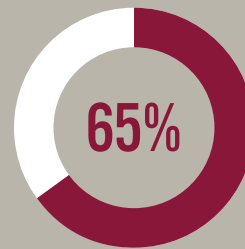
CAN



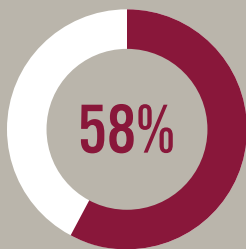
EMPLOYEE SENSE OF PURPOSE



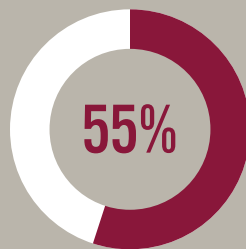
EMPLOYEE SENSE OF OPPORTUNITY



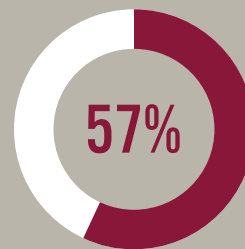
EMPLOYEE SENSE OF SUCCESS



EMPLOYEE SENSE OF APPRECIATION



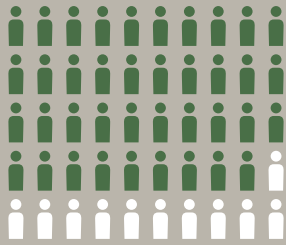
EMPLOYEE SENSE OF WELLBEING



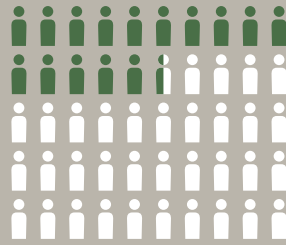
EMPLOYEE SENSE OF LEADERSHIP

MEXICO

Mexico's workforce is undergoing immense change. Leadership structures are becoming flatter, there is an increase in workplace flexibility, and a focus on recruiting top talent from universities with more competitive pay and benefits.



78%
of employees are satisfied with their current workplace culture



31%
of employees in Mexico feel a sense of burnout

76%

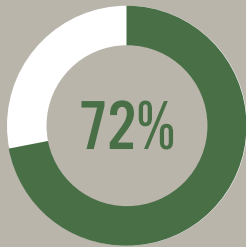
of employees in Mexico are engaged

66%

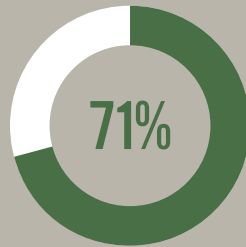
would leave for another job with similar role, pay, and benefits

MEX

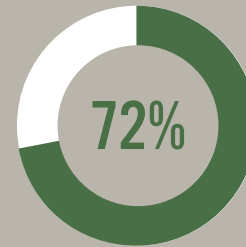
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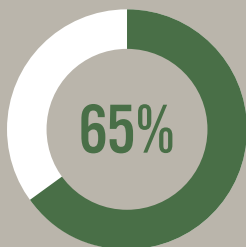
EMPLOYEE SENSE OF PURPOSE



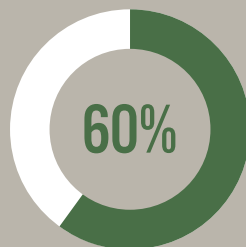
EMPLOYEE SENSE OF OPPORTUNITY



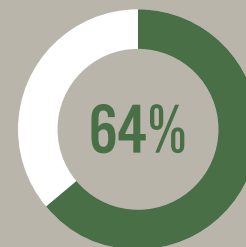
EMPLOYEE SENSE OF SUCCESS



EMPLOYEE SENSE OF APPRECIATION



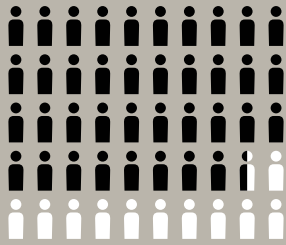
EMPLOYEE SENSE OF WELLBEING



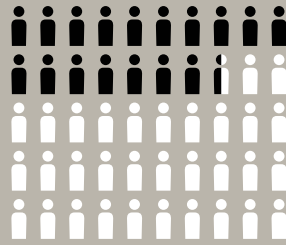
EMPLOYEE SENSE OF LEADERSHIP

BRAZIL

Brazilian companies will want to transform themselves in the next few years. With companies expanding and growing globally, and a demand for flexible workspace, employers are focusing on building better workplaces that cater to their employees' diverse needs.



77%
of employees are satisfied with their current workplace culture



35%
of employees in Brazil feel a sense of burnout

78%

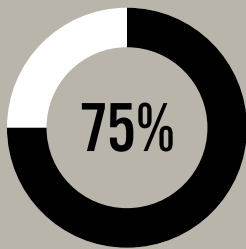
of employees in Brazil are engaged

60%

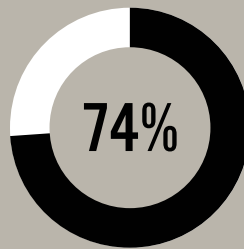
would leave for another job with similar role, pay, and benefits

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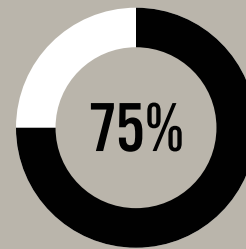
BRA



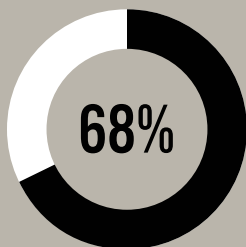
EMPLOYEE SENSE OF PURPOSE



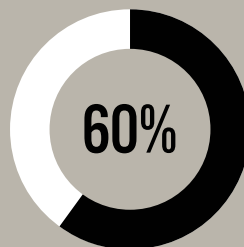
EMPLOYEE SENSE OF OPPORTUNITY



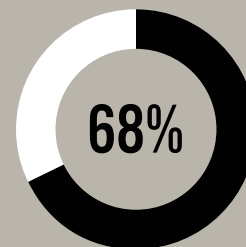
EMPLOYEE SENSE OF SUCCESS



EMPLOYEE SENSE OF APPRECIATION



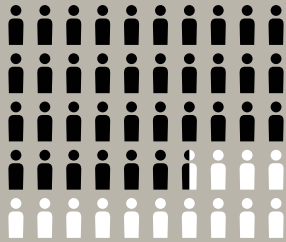
EMPLOYEE SENSE OF WELLBEING



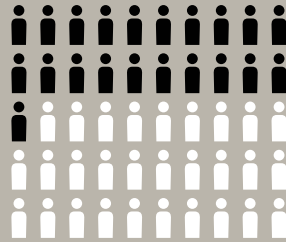
EMPLOYEE SENSE OF LEADERSHIP

ARGENTINA

Argentina's economy has endured turbulent times, affecting employee turnover. The economy remains volatile, and organizations are hiring older, more seasoned workers who may be less prone to turnover.



73%
of employees are satisfied with their current workplace culture



42%
of employees in Argentina feel a sense of burnout

71%

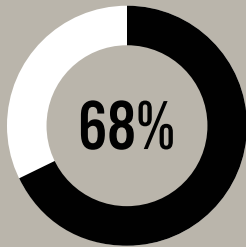
of employees in Argentina are engaged

60%

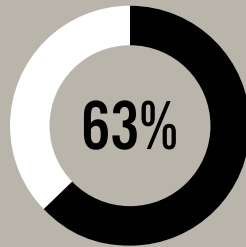
would leave for another job with similar role, pay, and benefits

ARG

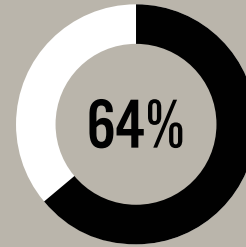
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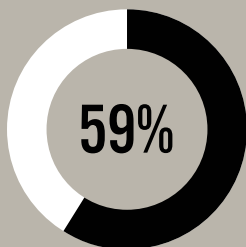
EMPLOYEE SENSE OF PURPOSE



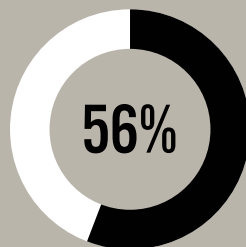
EMPLOYEE SENSE OF OPPORTUNITY



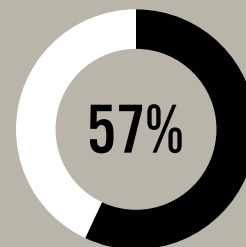
EMPLOYEE SENSE OF SUCCESS



EMPLOYEE SENSE OF APPRECIATION



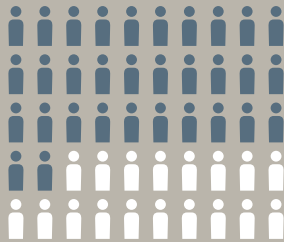
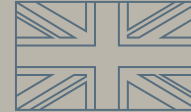
EMPLOYEE SENSE OF WELLBEING



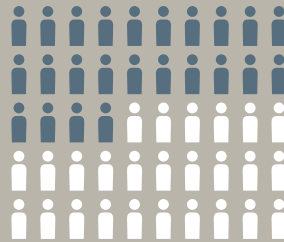
EMPLOYEE SENSE OF LEADERSHIP

UNITED KINGDOM

With the uncertainty of Brexit's impact and an increase in stress, employees are turning to "alternative jobs." UK companies are looking to use the employee experience, new types of leadership, and more workplace flexibility to meet the needs of their people.



64%
of employees are satisfied with their current workplace culture



48%
of employees in the United Kingdom feel a sense of burnout

67%

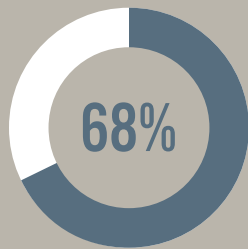
of employees in the United Kingdom are engaged

54%

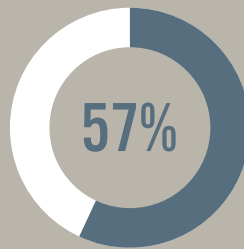
would leave for another job with similar role, pay, and benefits

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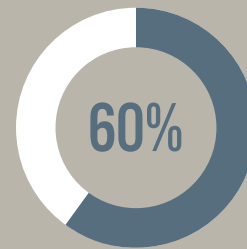
GBR



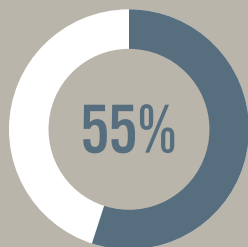
EMPLOYEE SENSE OF PURPOSE



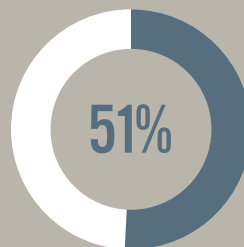
EMPLOYEE SENSE OF OPPORTUNITY



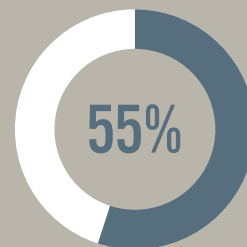
EMPLOYEE SENSE OF SUCCESS



EMPLOYEE SENSE OF APPRECIATION



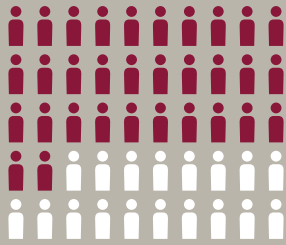
EMPLOYEE SENSE OF WELLBEING



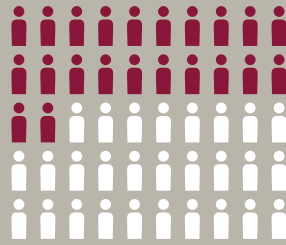
EMPLOYEE SENSE OF LEADERSHIP

GERMANY

With a booming economy, aging population, and shrinking workforce, German companies are looking outside to find skilled talent. Organizations will have to find creative ways to stay competitive in hiring and integrating a new, diverse workforce.



64%
of employees are satisfied with their current workplace culture



44%
of employees in Germany feel a sense of burnout

68%

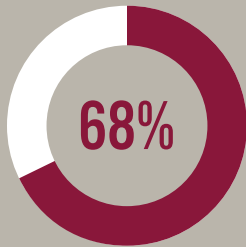
of employees in Germany are engaged

55%

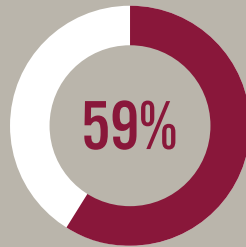
would leave for another job with similar role, pay, and benefits

DEU

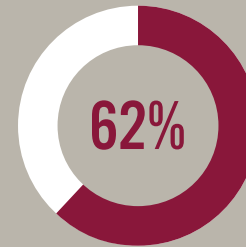
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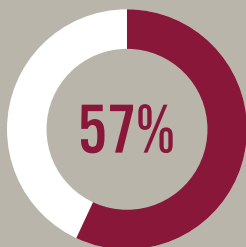
EMPLOYEE SENSE OF PURPOSE



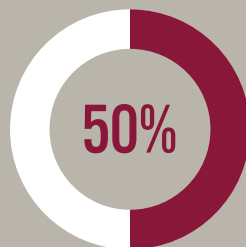
EMPLOYEE SENSE OF OPPORTUNITY



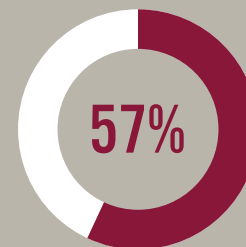
EMPLOYEE SENSE OF SUCCESS



EMPLOYEE SENSE OF APPRECIATION



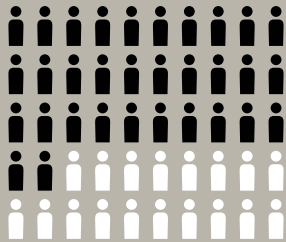
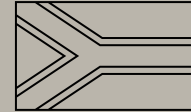
EMPLOYEE SENSE OF WELLBEING



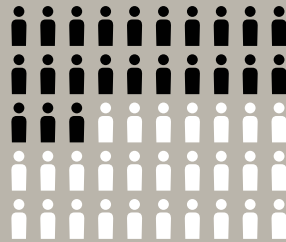
EMPLOYEE SENSE OF LEADERSHIP

SOUTH AFRICA

South African companies have seen an increase in the integration of technology at work, along with a rise in co-working workspaces. Organizations are trying to build employee workspaces that create a positive, healthier, more engaging employee experience.



64%
of employees are satisfied with their current workplace culture



46%
of employees in South Africa feel a sense of burnout

74%

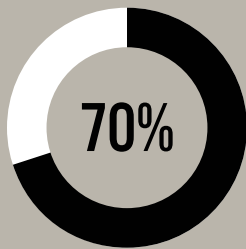
of employees in South Africa are engaged

53%

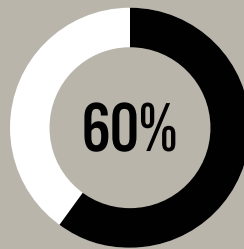
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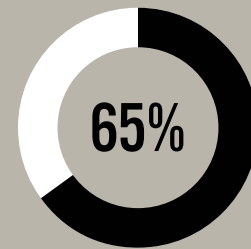
ZAF



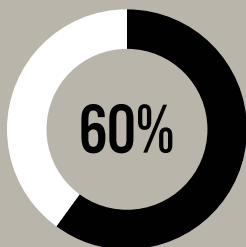
EMPLOYEE SENSE OF PURPOSE



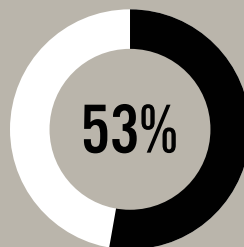
EMPLOYEE SENSE OF OPPORTUNITY



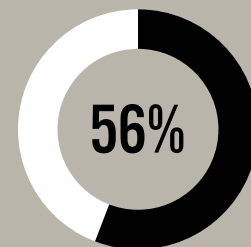
EMPLOYEE SENSE OF SUCCESS



EMPLOYEE SENSE OF APPRECIATION



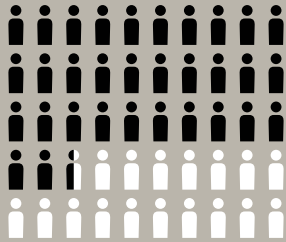
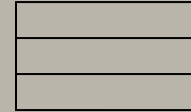
EMPLOYEE SENSE OF WELLBEING



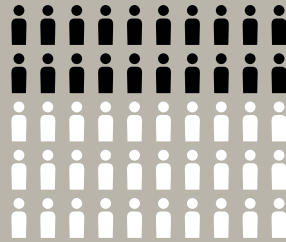
EMPLOYEE SENSE OF LEADERSHIP

RUSSIA

Russia is seeing a shrinking workforce due to an aging population. Companies will struggle with increasing labor productivity as well as the politics of hiring immigrant workers.



65%
of employees are satisfied with their current workplace culture



40%
of employees in Russia feel a sense of burnout

62%

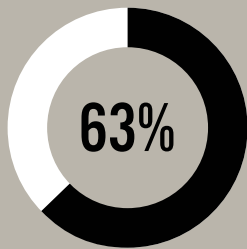
of employees in Russia are engaged

47%

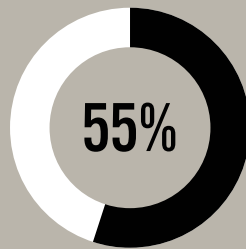
would leave for another job with similar role, pay, and benefits

RUS

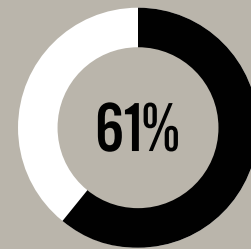
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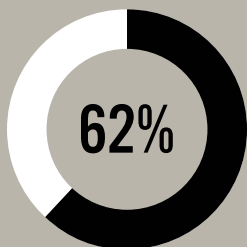
EMPLOYEE SENSE OF PURPOSE



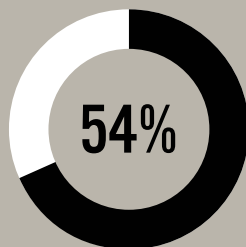
EMPLOYEE SENSE OF OPPORTUNITY



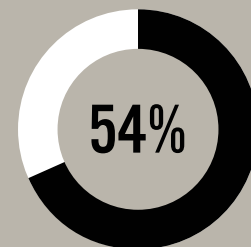
EMPLOYEE SENSE OF SUCCESS



EMPLOYEE SENSE OF APPRECIATION



EMPLOYEE SENSE OF WELLBEING



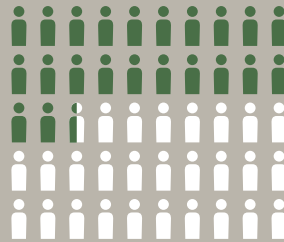
EMPLOYEE SENSE OF LEADERSHIP

INDIA

India's relatively young and unskilled workforce has undergone massive growth in recent years, as well as the lure of opportunities abroad. Companies need to balance their desire for innovation with employees' needs for flexibility and career development.



84%
of employees are satisfied with their current workplace culture



45%
of employees in India feel a sense of burnout

84%

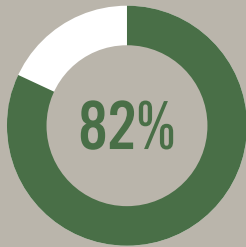
of employees in India are engaged

75%

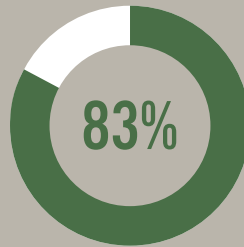
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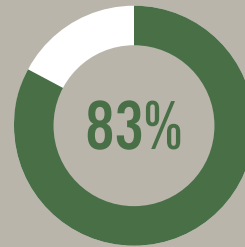
IND



EMPLOYEE SENSE OF PURPOSE



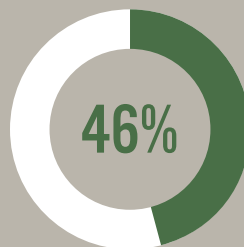
EMPLOYEE SENSE OF OPPORTUNITY



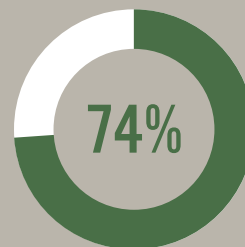
EMPLOYEE SENSE OF SUCCESS



EMPLOYEE SENSE OF APPRECIATION



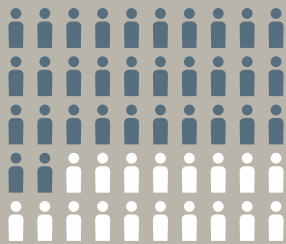
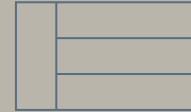
EMPLOYEE SENSE OF WELLBEING



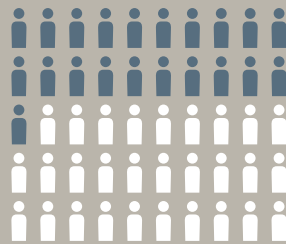
EMPLOYEE SENSE OF LEADERSHIP

UNITED ARAB EMIRATES (UAE)

With the average age of the UAE workforce less than 30 years old, companies are rethinking how they find and hire skilled talent. Organizations are changing how they utilize salary/benefit packages, technology, and workplace flexibility to attract workers.



64%
of employees are satisfied with their current workplace culture



42%
of employees in the UAE feel a sense of burnout

74%

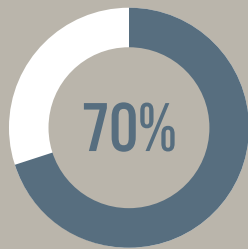
of employees in the UAE are engaged

63%

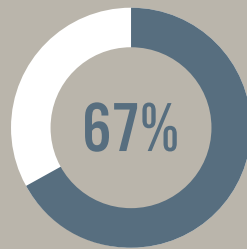
would leave for another job with similar role, pay, and benefits

ARE

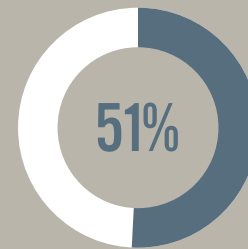
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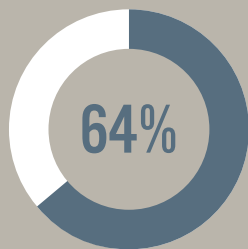
EMPLOYEE SENSE OF PURPOSE



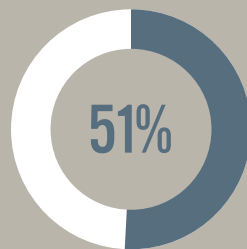
EMPLOYEE SENSE OF OPPORTUNITY



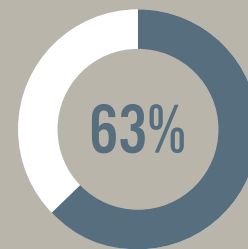
EMPLOYEE SENSE OF SUCCESS



EMPLOYEE SENSE OF APPRECIATION



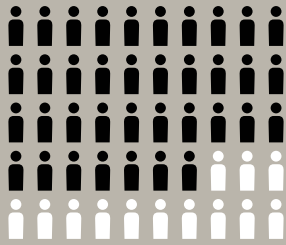
EMPLOYEE SENSE OF WELLBEING



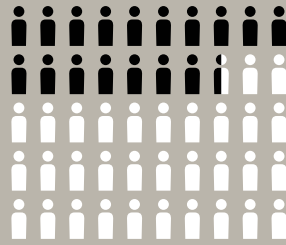
EMPLOYEE SENSE OF LEADERSHIP

CHINA

Automation, a shrinking workforce, and an increased need for tech workers challenge Chinese companies. Organizations will need to address the uncertainty that comes with a potentially more polarized workforce and growing economic tensions.



74%
of employees are satisfied with their current workplace culture



35%
of employees in China feel a sense of burnout

69%

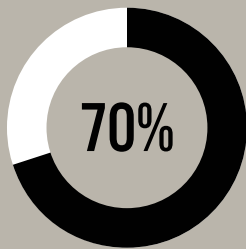
of employees in China are engaged

66%

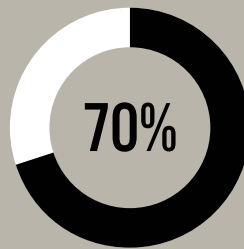
would leave for another job with similar role, pay, and benefits

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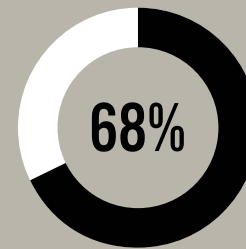
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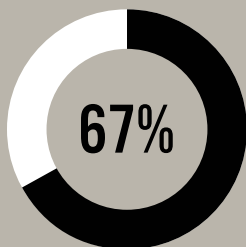
EMPLOYEE SENSE OF PURPOSE



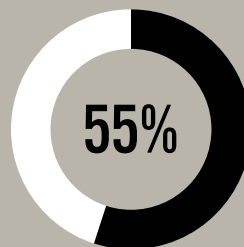
EMPLOYEE SENSE OF OPPORTUNITY



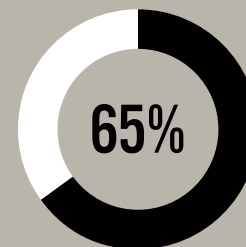
EMPLOYEE SENSE OF SUCCESS



EMPLOYEE SENSE OF APPRECIATION



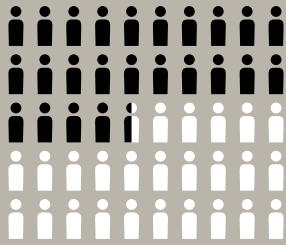
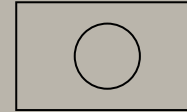
EMPLOYEE SENSE OF WELLBEING



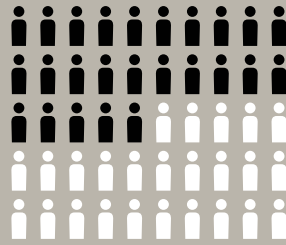
EMPLOYEE SENSE OF LEADERSHIP

JAPAN

Japanese companies are struggling with an aging, shrinking workforce. Organizational culture change remains slow. Companies need to address the wellbeing needs of a younger, more gender-diverse workforce including greater flexibility and benefits for new parents.



49%
of employees are satisfied with their current workplace culture



50%
of employees in Japan feel a sense of burnout

51%

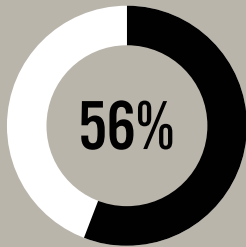
of employees in Japan are engaged

49%

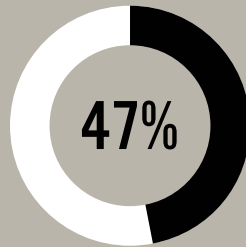
would leave for another job with similar role, pay, and benefits

JPN

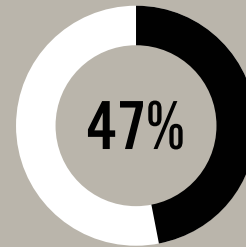
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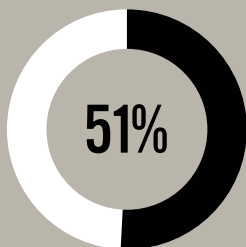
EMPLOYEE SENSE OF PURPOSE



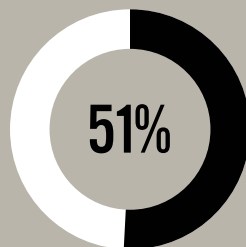
EMPLOYEE SENSE OF OPPORTUNITY



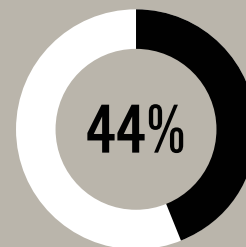
EMPLOYEE SENSE OF SUCCESS



EMPLOYEE SENSE OF APPRECIATION



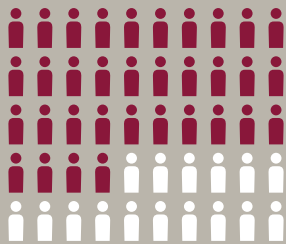
EMPLOYEE SENSE OF WELLBEING



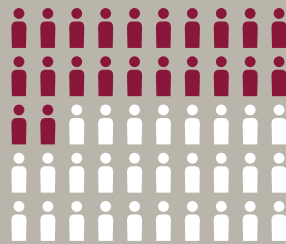
EMPLOYEE SENSE OF LEADERSHIP

SINGAPORE

Singapore's economy has been growing, and organizations are beginning to understand that employees want flexibility and opportunities to grow. Companies are adopting technology in new ways to create a more meaningful employee experience.



68%
of employees are satisfied with their current workplace culture



44%
of employees in Singapore feel a sense of burnout

68%

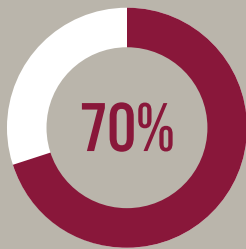
of employees in Singapore are engaged

60%

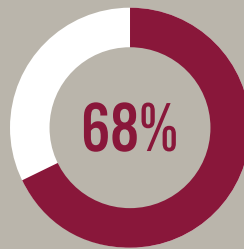
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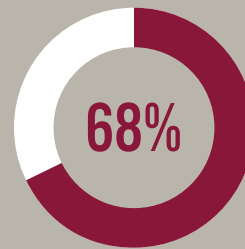
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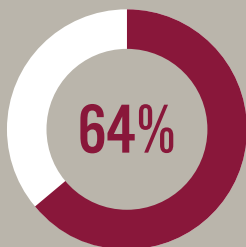
EMPLOYEE SENSE OF PURPOSE



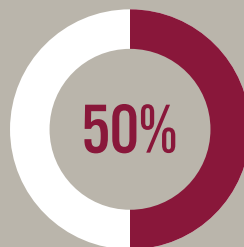
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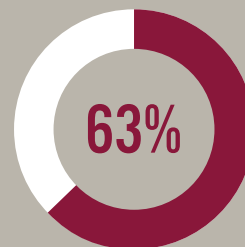
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EMPLOYEE SENSE OF APPRECIATION



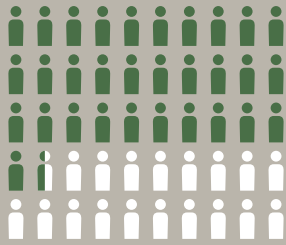
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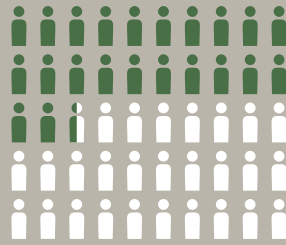
EMPLOYEE SENSE OF LEADERSHIP

AUSTRALIA

Australian companies have fully embraced employees' needs for flexible work arrangements, collaboration, and a fulfilling purpose. The next step is to figure out the impact and role of alternative labor, A.I., and rewards and recognition.



71%
of employees are satisfied with their current workplace culture



45%
of employees in Australia feel a sense of burnout

75%

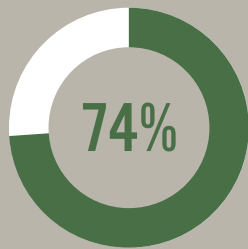
of employees in Australia are engaged

64%

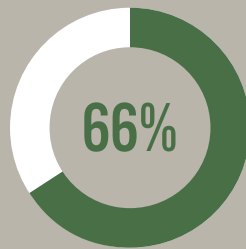
would leave for another job with similar role, pay, and benefits

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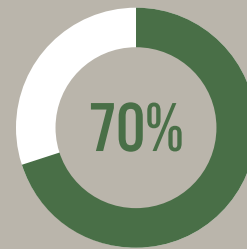
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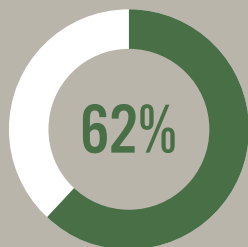
EMPLOYEE SENSE OF PURPOSE



EMPLOYEE SENSE OF OPPORTUNITY



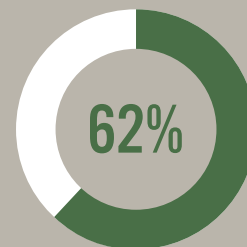
EMPLOYEE SENSE OF SUCCESS



EMPLOYEE SENSE OF APPRECIATION



EMPLOYEE SENSE OF WELLBEING



EMPLOYEE SENSE OF LEADERSHIP

O.C. Tanner is the global leader in software and services that improve workplace culture through meaningful employee experiences. Our Culture Cloud is a suite of apps and solutions, including recognition, service awards, wellbeing, leadership, and events that help people thrive at work. We proudly connect people to purpose, accomplishment, and one another at thousands of the most respected companies on earth.

The O.C. Tanner Institute conducts research and publishes insights that help organizations attract, engage, and retain top talent. This provides a global forum for exchanging ideas about workplace cultures that inspire greatness.

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David Sturt
Executive Vice President

Gary Beckstrand
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Alexander Lovell
Manager, Research Services

Samantha Austin
Senior Research Analyst

Chris Berry
Research Analyst

Clair Bidez
Research Analyst

McKay Murphy
Research Support

Writing

Chris Drysdale
Christina Chau
Todd Nordstrom
Andrew Scarcella

Design

Julia LaPine
Brandon Jameson
Emily Tanner
Stephanie Brocious

Illustration

Karolin Schnoor

Printing

Paragon Press

Media Contact

Lindsey Nikola
Public Relations Manager
O.C. Tanner
+1 801 493 3055
lindsey.nikola@octanner.com

Research Contacts

Alexander Lovell
Manager, Research Services
O.C. Tanner Institute
+1 801 493 3020
alexander.lovell@octanner.com

Gary Beckstrand
Vice President
O.C. Tanner Institute
+1 801 493 3086
gary.beckstrand@octanner.com

