

The Employee Experience Playbook for Retail

A **5-step approach** for boosting the productivity, engagement and loyalty of your retail employees



Outline



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Preface

The retail sector has experienced an unusual couple of years.

Once lockdowns (due to COVID-19) were no longer needed, many retailers found it difficult to recruit employees. **The Great Resignation** was afoot, with 721,000 retail workers in the US quitting their jobs in August 2021. Labor shortages in the sector caused further uncertainty in a sector still recovering from the disruption of the pandemic.

Now the Great Resignation has given way to the "Great Attrition". That's the term being used by McKinsey & Company to explain the large number of frontline retail workers that are thinking of quitting. In fact, research suggests that a staggering **63%** of managers and 36% of nonmanagers in the retail sector are thinking about leaving their jobs in the upcoming three to six months.

Retaining retail employees was always challenging, but now it is also **becoming more difficult to replace those who leave**. Companies that don't have a great employee experience will undoubtedly get into serious problems with understaffed stores or limited opening times. Some may even have to close completely.

For retail CEOs, there are already so many challenges, like inflation and supply chain disruption, to consider. Where should attrition be on the CEO agenda, and why?

Of course, you can't do without frontline employees. They are the ones running the stores and making sure customers are satisfied. But, it's not simply about having enough frontline employees to open your doors; creating the right environment so your frontline workers can perform at their best is key.

Companies with lower frontline turnover have an average of 3% more comparative-store sales.

So if you want to keep growing your business, or at least prevent it from shrinking, you should ensure you find a better way to attract and retain your frontline employees, making them more successful and engaged.



It's important to really understand what the needs of your employees are. Why do they work at your company? What is your Employer Value Proposition (EVP)?

What areas of the Employee Experience need to improve to attract and retain your specific workforce? We call this the 'Magnet Framework.' It basically means that every company is like a magnet that attracts and retains its employees. The stronger the magnetic force, the better. Many different components make up that magnetic force. But it starts with understanding your employee population and creating a magnetic force that attracts and retains the right people.

Let's end with this great quote from David Fuller (McKinsey & Company): "The biggest mistake that retailers make is having a narrow focus on the folks who probably sit around a CHRO's office."

Instead, retail firms should take a closer look at their frontline. They need to look at their stores and innovate faster than they do within their corporate headquarters. Ultimately, the individuals actually based within your stores (your frontline retail employees) are the ones that manage your day-to-day operations. They are the lifeblood of your organization. If they leave, and you just have a corporate staff left, you're not going to sell much.

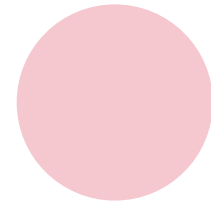
It all comes down to the big gap between the headquarters and the frontline. That is why companies should focus on bridging that gap and making their frontline more successful and engaged. How? We've created a 5-step approach to boost productivity, engagement, and loyalty among retail employees. Keep reading to find out more.



Ruben Wieman,
Founder of Onetam



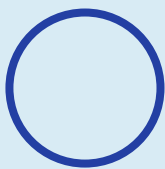
Jurrien Strobel,
CEO & Founder of Shiftbase



Step 1:

Map your current state of employee experience

Bridging the gap between the head office and the frontline starts with fixing what's broken. To uncover areas for improvement, it is therefore essential to map the current state of employee experience at your organization.



Frontline Overview

How many frontline workers do you have? Where are they based? What are their shift patterns? Start mapping the employee experience of your frontline retail workers by creating a top-line overview. Improving visibility around these workers is the first step to improving their day-to-day experience.

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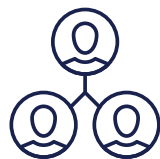
Employee Persona Profiles

To gain a better understanding of your frontline employees, consider creating employee personas based on your workers' characteristics, responsibilities, wants, and ambitions. Use data and insights from your workforce to inform the creation of these personas, accompanying them with names, images, and quotes. Also, remember to test and iterate your personas until they are truly representative of your employees.

Employee Value Proposition

Understanding your Employee Value Proposition helps companies to define what they are really about. It defines your values and, at the same time, what you can offer to employees. It details why your store is inspiring, motivating, and simply a great place in which to work.

3



4

Company Values

Almost half of all job seekers believe company culture is "very important" to where they choose to work. The values that your organization embodies - positive traits like honesty, trust, diversity, and fun - ensure your company is a unique and inspirational place to work at.

People Metrics

Unless you collect data, it's impossible to have any real visibility into your employee experience. Some key metrics to collect for your frontline workers include interactions with company comms, absenteeism, turnover, and employee satisfaction.

5





People Priorities

While the employee experience is viewed as being more important by businesses generally today, frontline workers are often forgotten about. They represent some of the most disengaged workers across the world, with **41% of retail workers hardly ever, or not very often, looking forward to going to work.**

Take the time to better understand what is important to your frontline workers. Meet their priorities and your company goals will suddenly seem a lot more achievable.



Onboarding

Onboarding is crucial to a positive employee experience and starts before your frontline workers' first days on the job. The days of handing out stacks of documents to your workers should be left in the past. An onboarding app can provide all the resources employees need to guide them through the onboarding process.

6

Employee Feedback

Don't make assumptions about the experience of your frontline workers. Ask them. Put employee feedback mechanisms in place to ensure it is as easy as possible for managers to ask their staff questions and for employees to pass comments on to higher-ups.

7



8

Internal Communication

More than 80% of deskless workers claim that they don't receive adequate communication from their employers. These individuals may not have a company computer or even an email address, but they still need updates from managers and colleagues. A mobile optimized platform can ensure frontline workers receive all the necessary information.

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10

Training

As many as **32% of retail workers state that they receive no formal training**. More than in any other industry. Training can keep staff engaged, boost productivity, and deliver the personal progression that workers crave.

HR, Scheduling & Operational Tools

Frontline workers can't walk over from their desks to visit the HR team, which often means there is a disconnect between these two valuable roles within a retail company. Ensure HR, **scheduling**, and operational channels remain open and accessible to your frontline retail workers at all times.

11



Ready to map your current employee experience?

Access and download your (ungated) Frontline Employee Experience Canvas and get started with the first step to improving your EX.

[Get access](#)

People Strategy Overview

Frontline Emp

1 Frontline overview
Job functions + percentage of total employees.
Function name | Percentage of employees

- _____ | _____
- _____ | _____
- _____ | _____
- _____ | _____
- _____ | _____
- _____ | _____

3 Employee value proposition
What are the top reasons employees work for you and not for a competitor?

- _____
- _____
- _____

Company Value
Describe your com

- _____
- _____
- _____

2 Employee persona profiles
Frontline employee persona + description

- _____
- _____
- _____

5 People Metrics
Important health metrics | Rate from 1 (negative) to 10 (positive).

Employee turnover % first 90 days 1 ● ● ● ● ● 10

Employee turnover in general % 1 ● ● ● ● ● 10

Employee satisfaction score 1 ● ● ● ● ● 10

Employee shortage 1 ● ● ● ● ● 10

Employee feedb
Top 3 feedback poi

- _____
- _____
- _____

People priorities
What are the top priorities for the HR team

- _____
- _____
- _____

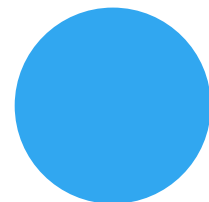
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Step 2:

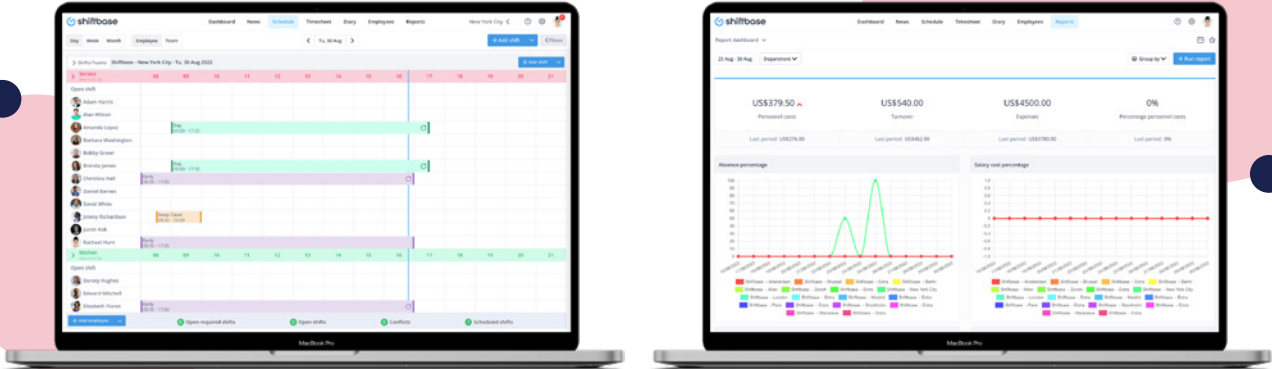
Optimize your workforce management

Workforce management has been key to onboarding, scheduling, productivity, and much more. It has always been important, but the disruption caused by the pandemic only served to heighten its significance in the workplace.



1 What is workforce management?

Workforce Management (WFM) comprises a set of processes that help you supercharge the performance levels of your business. These include:



- **Forecasting** - Observing real-time data to improve decision-making around agent demand.
- **Scheduling** - Establishing the most **efficient schedule** to meet workplace demands and maintain a seamless workflow in the face of unexpected changes or circumstances.
- **Adherence** - Monitoring the extent to which agents stick to their schedules throughout the day.
- **Reporting** - Using dashboards and reports to help supervisors gather performance data and understand operations more easily.

In essence, WFM is a system for ensuring your company is run efficiently. Similarly, workforce optimization (WFO) takes this up a notch. It delivers fewer risks, enhanced ROI, and better customer service. In retail, this often revolves around time tracking and scheduling. In the past, retail outlets may have simply stuck to a rota based on availability. But in the modern retail sector, workforce management solutions can match certain tasks to an individual's skillset, attendance, and performance, preventing understaffing simultaneously.

2 What is workforce management?

In order for WFM to deliver the necessary results, it is essential that businesses involve all stakeholders - including their frontline retail workers. Collecting data is key. Especially if automated scheduling is going to work properly. With the right data, stores can predict customer demand more effectively, which is a huge help in ensuring they have the right number of employees, in the right stores, at the right times.

The ability to set targets, measure progress, and forecast workloads is also key. Some retailers even employ workforce analysts or entire workforce management teams to help them get the most from their workforce management **tools**. While this may not be necessary for all organizations, it can help with scheduling, training, and communication.

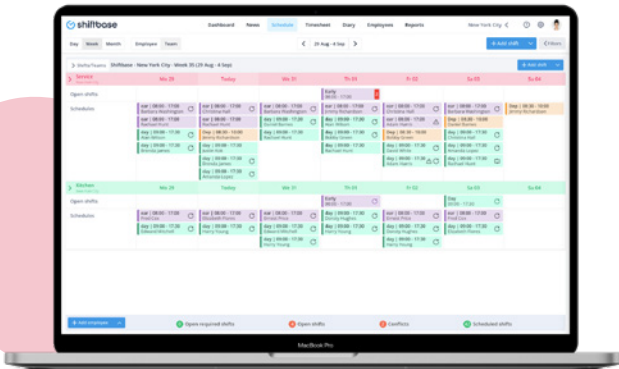
Enabling self-service is another important factor in delivering the best results when using a WFM platform. Self-service can allow retail workers to see, accept and swap shifts from their smartphones. There's no need for employees to request time off or a particular shift by engaging in lengthy email chains with their managers, or even face-to-face conversations.



With the right data, stores can predict customer demand more effectively.

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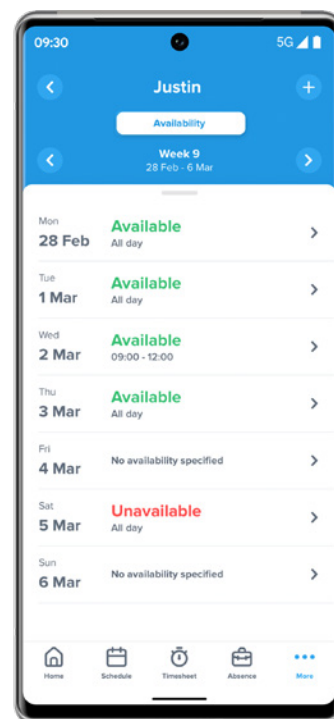
Workforce optimization examples: Scheduling, Time Tracking, Performance Management



In the retail sector, scheduling remains one of the most important features of any workforce optimization tool. Retail employees often work irregular shifts depending on varying levels of demand or unexpected absences. Time management differs from company to company, with some continuing to rely on **Excel spreadsheets** or unclear email messages for their scheduling needs.

Instead, workforce optimization tools let employees fill in availability themselves, allowing for the automated creation of shift patterns that takes into account how many workers are needed for each shift. Productivity can be assessed by departments, administrative errors are reduced, and managers can receive a clear overview of each employee's schedule.

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Benefits of workforce management optimization

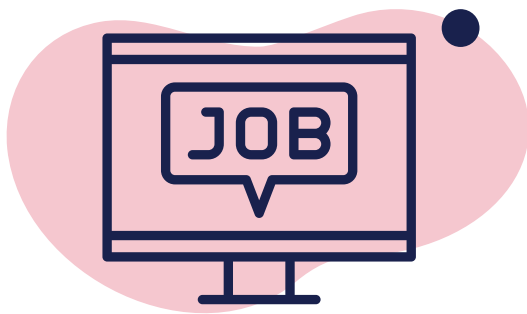
Perhaps retailers have managed their workforce in the same way for years and don't see any reason to change. This would be a short-sighted decision. Almost two-thirds (**64%**) of retail leaders are currently exploring new technology solutions, with frontline workers expecting to enjoy the same level of digital functionality in work as they do in their personal lives. As well as helping to compete with other employers in the retail space, workforce management optimization provides these other benefits too:

- **Improved visibility:** Unlike traditional solutions, online WFM solutions let all your retail workers view the upcoming schedule, with adjustments made immediately.
- **Accessible everywhere:** WFM tools are cloud-based, which means they can be accessed via a mobile device, wherever your workers are, at all times of the day.

- 
- **Swapping shifts:** Sometimes workers cannot make a previously accepted shift and need to find a colleague that can fill in for them. With the right WFM tool, workers can find and contact available colleagues to arrange a swap themselves. Managers don't need to waste time facilitating this; they can simply view and approve the swap as necessary.

- **Insights into availability and labor costs:** Shift scheduling can have impacts on employee wellbeing and remuneration. WFM solutions make all this clear to managers. View how many shifts an individual is working and how much money they are receiving from the company.

5 What is workforce optimization software?



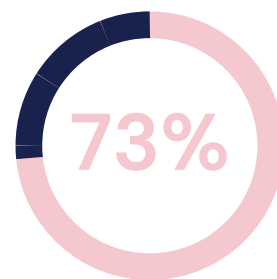
With digitalization well and truly underway in the retail sector, there are all kinds of software solutions being employed. These range from POS tools to cloud document storage, marketing tools, and, of course, workforce optimization software.

Workforce optimization software is a suite of tools collected as part of a single digital platform. This suite may include employee scheduling, employee performance tracking, skill gap monitoring, time tracking, and streamlined communications.

6 What are workforce optimization strategies?

Companies constantly have to find ways to streamline their business processes to keep up with changing market demands. One way to do this is by implementing smart workforce strategies. Some of the most popular strategies include:

- **Becoming more customer-centric:** 73% of shoppers say that customer service is an important factor in their purchasing decisions. As such, it makes sense for retailers to prioritize this - including when implementing their workforce optimization software.
- **Matching skills and tasks:** As with all jobs, not every employee is well suited to each task. Some workers may be excellent at managing their colleagues; others might prefer the hands-on job of answering customer queries. Whatever their area of excellence, don't deliver scheduling purely on availability. Match tasks to employee skillsets using features like a skills inventory for the best results.
- **Creating a training plan:** Make sure you offer your retail workers the opportunity for personal development. Ask them if there are any areas that they want to prioritize in terms of skills development and create a training plan to help them achieve their goals.



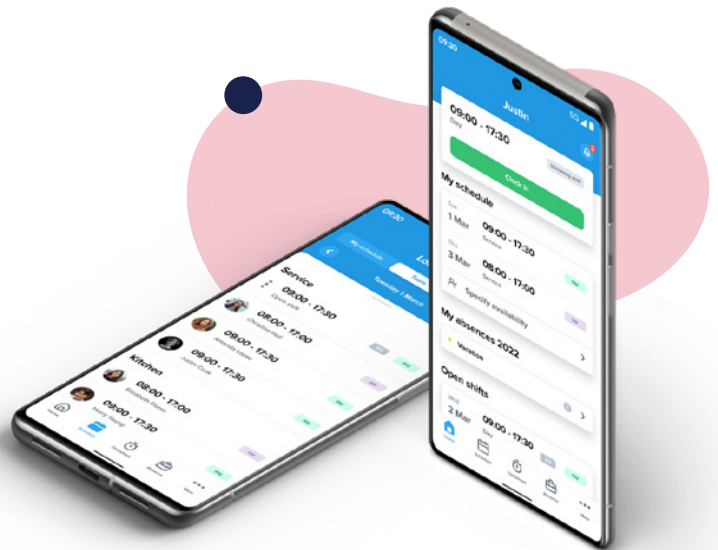
of shoppers say that customer service is an important factor in their purchasing decisions.

- **Open communication:** Just because retail workers may not have regular meetings with their team leaders or colleagues doesn't mean it should be challenging for them to talk with other personnel at the company. Improve communication by streamlining things. Don't send messages in a fractured manner across multiple channels. Unify notifications and updates via a single platform.

7 Integrations with other HR and WFM software

By integrating WFM software with other HR solutions, like an employee app, you can unify the entire employee experience into one platform. This helps you reduce the number of systems your frontline employees need to use for work.

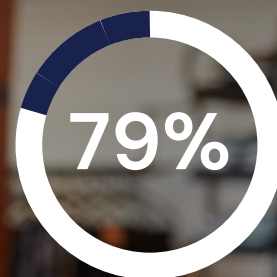
This integration enables workers to sync their data across tools and more easily access their real-time work schedules. Moving away from a fragmentary approach where multiple tools are unable to “speak” with each other means a worker’s every need is met, from employee scheduling to direct access to relevant HR info, from a single digital solution. Everything a frontline retail worker needs. In one app.



8 The present and the future of workforce management

Last year, **79%** of survey respondents stated that effectively managing work with their personal lives was a well-being priority, a two percent increase compared with the previous year. **Employee expectations** are changing, as are customer demands. Modern WFM tools need to provide retail workers with more flexibility, visibility, and autonomy than ever before.

Concerning time tracking and scheduling, employees won't accept being dictated to in terms of when and where they work by receiving an email out of the blue. Instead, an open platform allows adjustments to be made in real-time via a smartphone app. E-Commerce has shown that shoppers want to enjoy convenience and speed as part of the retail experience. Workforce management tools can provide this for retail workers too.



of survey respondents stated that effectively managing work with their personal lives was a well-being priority

Step 3:

Improve your internal communication

For all companies, effective communication is essential. It enables colleagues to engage with each other, share updates, and organize shifts. For managers and team leaders, it lets them espouse company values more easily. For frontline workers, however, internal communication can present challenges. Without a desk or even, sometimes, a company email address, communicating with workers isn't necessarily easy.

For retail workers, **internal communication** can provide a way for companies to share information with the stockroom, shop floor, and other hard-to-reach areas. It can let employers share relevant business updates, provide workers with a sense of purpose, strengthen internal culture, collect feedback, and foster collaboration. More broadly, good internal communication can enhance the employee experience, which boosts retention and leads to lower employee turnover.

The cost of employee turnover

Research indicates that engaged employees are **87%** less likely to leave their organization, but how should retailers boost engagement among their workers? One way is to make sure that their internal communication strategy is working.

An overwhelming **85%** of employees said they're most motivated when management offers regular updates on company news. Given that over 90% of frontline workers own a smartphone, there is a way for companies to reach their retail employees. Whether it's via social intranet or a bespoke **employee app**. They can be communicated with, they can be engaged with, and they can be retained.



85% of employees said they're most motivated when management offers regular updates on company news



Some hands-on tips to improve your internal comms:

The benefits of internal communication for your frontline staff may be clear, but how can employers improve their internal communication strategy? We've included a few tips below:

1

Make it accessible

Just because retail workers may not have a desk doesn't mean they are unreachable. However, emails are easily missed, and most employees don't want to scroll through confusing messages from multiple parties. Likewise, they may not want businesses to send them messages via platforms that they usually keep for personal matters, like **WhatsApp**. Using an employee app to communicate solves these problems, providing streamlined and clear communication.

2

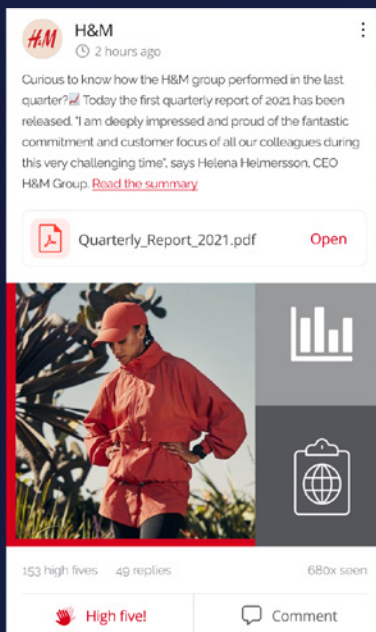
Personalize

Simply offering more communication won't magically boost engagement. Retailers should demonstrate that they care about their employees as individuals by offering some form of personalization in their messaging. This could be something simple like a birthday message or an award based on their particular interests. Unfortunately, many brands don't take this approach, with **63%** of organizations revealing that they offer no individual personalization as part of their workplace digital experience.

3

Share important updates

Keep your frontline employees directly updated on products, promos, systems, and regulations. Use graphics and make them eye-catching to get their attention. Ensure your message is given the prominence it needs by your **internal communication tools** to ensure it is read.



Example: how H&M updates their frontline employees with business updates

4

Ensure a two-way dialogue

Internal communication shouldn't just be about managers providing updates or informing employees about their next shift schedule. Good internal communication creates two-way dialogues. Use it to give your retail staff an outlet to ask questions and share feedback with their colleagues.

5

Check-in regularly

Good internal communication doesn't mean sending out a workplace survey every six months. It's about keeping communication channels open at all times. What's more, remember to check in regularly with your retail workers. Ask them how sales are going, about recent customer interactions, or their plans for the future.

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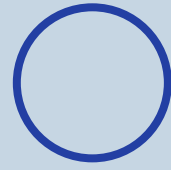
Celebrate success

Internal communication provides a great way of letting your retail employees know that they're appreciated. Is someone enjoying some impressive sales figures? Have they received some positive customer feedback recently? Make it clear that employee success is being noted and recognized.

Some hands-on tips to improve your internal comms:

If retailers are looking to utilize digital tools to revamp their internal communication strategy, there are a few different options they can take. Intranets (private company networks that are available via the internet) represent one possible choice, but they are not always mobile optimized, which is vital for some retail staff.

Bespoke instant messaging tools could be created as an alternative, but retailers may want to offer forms of functionality too. Shift scheduling, for example, isn't always easy to present as a message. Whether it's to an individual or a group. Instead, a fully-fledged frontline employee communication app can boost communication through all stages of the employee journey, from onboarding to departure. At the same time, it delivers opportunities for collaboration, gamification, and integration with other tools - **all in a mobile-first format.**

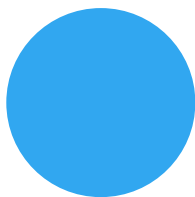


Step 4:

Offer the right digital training solutions

While many retail workers receive little or no training, this doesn't mean that they wouldn't welcome more opportunities to develop their skills. Of course, because they are deskless, they are likely to require mobile solutions to allow them to access the learning resources they need. This is particularly true of younger demographics, with **96%** of individuals owning a smartphone. This cohort of workers is not just tech-savvy, they prefer being engaged on the smaller screen.

Make sure you offer mobile-centric training options for your retail workers from the moment they accept your job offer.

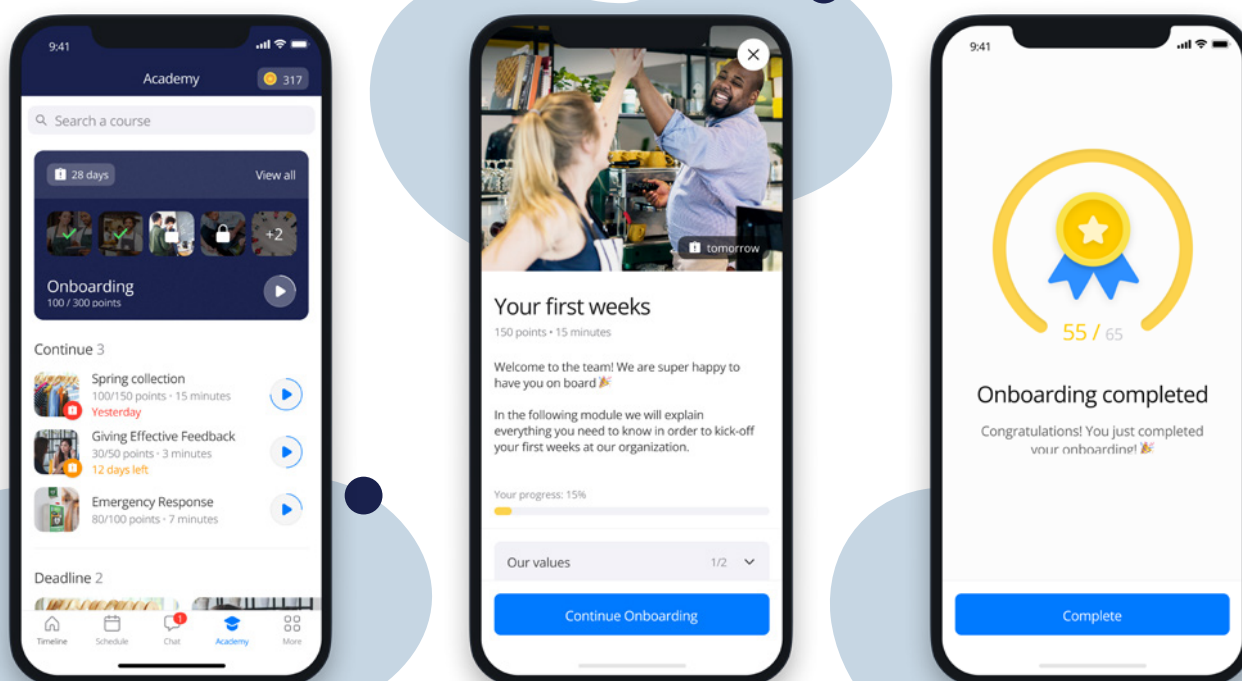


The onboarding process

Ensure that new hires are productive and engaged even before their first day at work through a robust **pre-boarding** and onboarding process. In terms of pre-boarding, this begins straight after your new hire signs their contract, allowing brands to generate engagement immediately. With **20%** of new employees leaving within their first 45 days of employment, retailers must immediately create engagement.

Pre-boarding can involve the creation of a personal invitation for workers on their first day, providing access to digital tools, and introducing employees to their new colleagues. It leads to higher engagement, productivity, and retention. Continuing this work, onboarding is what employees experience in the first few weeks of their job.

Onboarding usually takes the form of a structured program taking place over the first weeks or months. Despite this, just **12%** of employees believe that their organization does a great job of onboarding. This means businesses risk their retail workers experiencing unnecessary first-day nerves, confusion, or even opting to join a competitor.



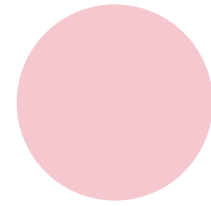
Example: how H&M updates their frontline employees with business updates

eLearning & mLearning

However long your employees have been at your company, they must be offered personal and professional development via easy-to-use solutions. Employee training represents an excellent opportunity for workers to grow their knowledge and improve their skills. Despite the cost of employee training, the return on investment is guaranteed if the employee training takes place consistently.

A highly trained workforce is likely to be more productive, deliver higher levels of customer service, and be less likely to leave. In fact, **42%** of new employees are more likely to stay when provided with proper training, translating into less turnover intention.

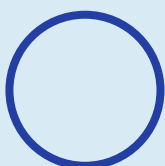
Due to the deskless nature of much retail work, **eLearning** programs delivered through mobile-first platforms (sometimes termed “mLearning solutions”) are increasingly popular. This doesn't mean forcing workers to read lengthy online resources or take exams using their smartphones. **Microlearning** offers retail workers the opportunity of developing their skills via interactive, mobile modules that take just a few minutes to complete. It means on their commute or break, they can remain engaged with your brand.



Step 5:

Standardize communication flows, gather feedback and continuously uncover areas for improvement

Standardizing your messaging is an important part of any internal communication strategy. Retail is a stressful industry to work in, with a 2022 survey revealing that **82%** of retail workers have experienced increased levels of stress and burnout. The last thing they need is inconsistent, confusing comms making things worse. Standardized communication flows can unlock a host of benefits, enabling businesses to gain a true understanding of their employees.



Forms & checklists

Retailers can improve their operational efficiency with digitalized forms and checklists. The old-fashioned method of using pen and paper to fill in forms, checklists, and all sorts of other internal reports is inefficient, time-consuming, and lacking in consistency.

On the other hand, **digitalized forms and checklists let you implement more stringent quality control and deliver consistency within your communications.** Whether you have a couple of stores or a multinational retail empire. Standardized messaging makes it easier for businesses to share their values, provide fast updates in minutes, and use less paper, which provides benefits in terms of sustainability.

Creating digital forms and checklists is easy with digital solutions. Retailers simply pick from a range of set templates, choose their audience, analyze submission reports, and, if needed, integrate those submissions with your other HR systems. Everything is connected, verifiable, and consistent.

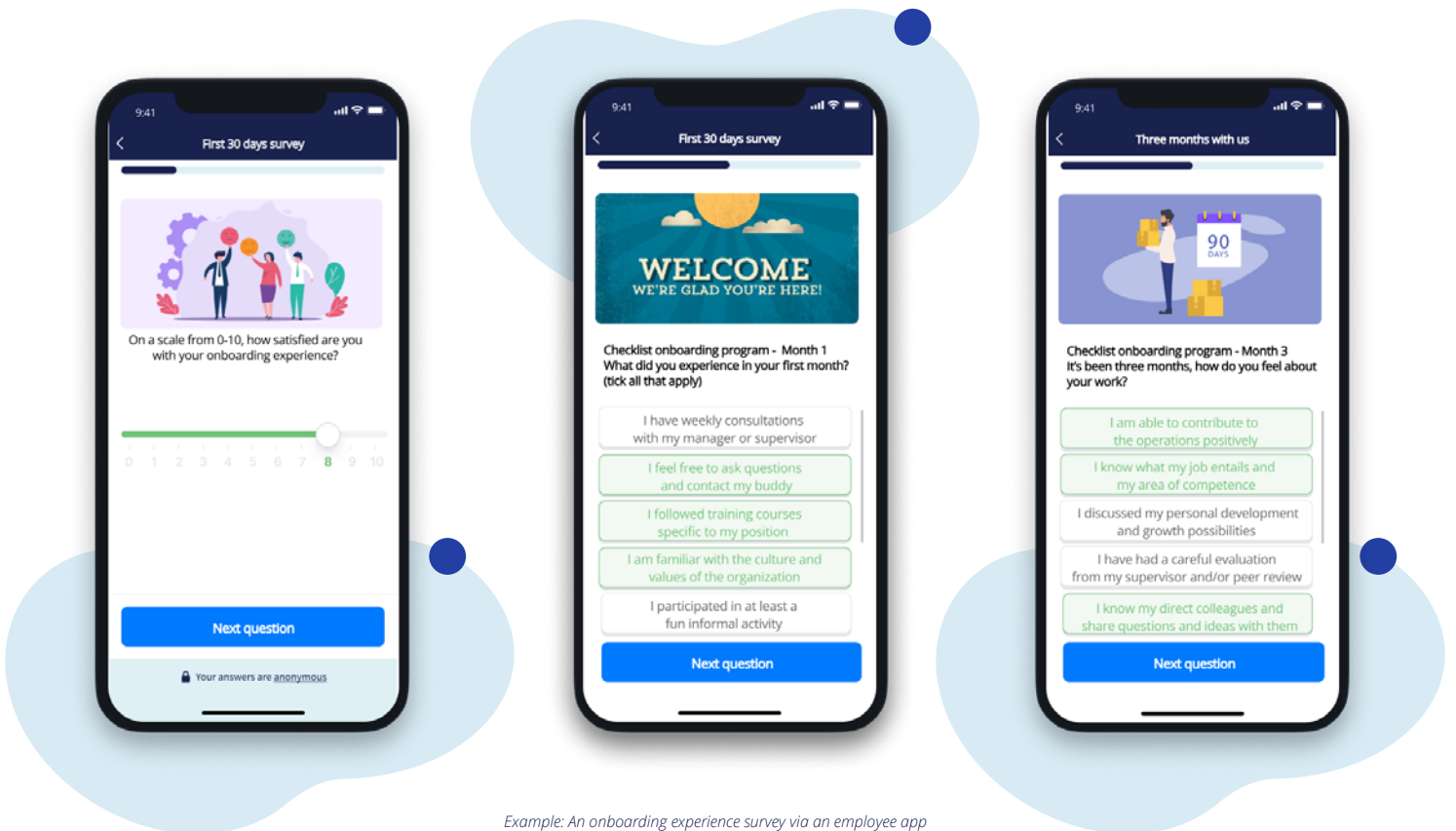
Make use of surveys

Surveys are a great way for retailers to receive employee feedback. Particularly if they don't have desks or regular meetings. Surveys can be beneficial for both the employees and the company, highlighting shortcomings as well as success stories.

There are various types of employee surveys that retailers can send to their workers depending on the type of information they want to gather.

These include:

- **Employee satisfaction surveys**
- **Pulse surveys**
- **Onboarding surveys**
- **Workplace surveys**
- **Offboarding surveys**



Example: An onboarding experience survey via an employee app

Surveys boost engagement by telling employees that their opinions are heard and valued. For companies, they offer visibility. Without asking employees, how can you know what workers like about their job and what could be improved? Why they joined your company or why they are thinking of leaving?

Conclusion

With workers often on their feet all day, lacking regular shift patterns or staff common areas, the retail sector is one of the hardest in which to prioritize employee engagement. But it is not impossible.

Many retail workers have the same ambitions as employees in other industries. They want to have input into how to best serve the customers. They want to develop professionally. And they want to receive an engaging, enjoyable experience while at work. If all of this can be delivered, it won't just be employees that will notice the benefits. Retailers will also reap the rewards, achieving higher levels of customer satisfaction and, as a result, higher ROI.

From mapping current employee experience to improving it step by step, HR managers in the retail space can ensure their workers are valued. Mobile-first digital tools can ensure that deskless workers don't miss out on the advantages that employees in other sectors enjoy.

Internal communication channels, feedback forms, training modules, and more can all reside within the palm of your employees' hands. If retailers give them the tools they need to thrive.



About Oneteam & Shiftbase



Oneteam's all-in-one employee app offers organizations the ultimate solution to make their frontline workforce successful and engaged. The solution is built for small HR teams looking for an easy-to-use platform that includes all the important ingredients to make their frontline workforce more successful and engaged. The platform consists of the following key components: internal communication, onboarding, eLearning, surveys, and forms & checklists. Furthermore, it's possible to seamlessly integrate the Oneteam platform with your current HR & operational systems.

Contact Oneteam

www.oneteam.io
info@oneteam.io



With Shiftbase, you can create a shift schedule online, register hours worked, and manage your personnel administration. Every employee has their own login details and can view data such as their work schedule, hours worked, and holiday balance. In addition to staff planning and time registration, Shiftbase offers many more features that can save employees a lot of time! For example, Shiftbase has an automatic surcharge calculation, with surcharges set per contract type or service. You'll also receive valuable information from Shiftbase via regular reports.

Contact Shiftbase

www.shiftbase.com
info@shiftbase.com



About the Oneteam X Shiftbase integration

Integrating Oneteam and Shiftbase helps businesses offer their employees a truly all-in-one experience, allowing workers to sync employee data and access their real-time work schedules. Workers can now access all the advanced functionality of Shiftbase, from employee scheduling to time-tracking, natively within the Oneteam app.