

LDS **live**

# Imagining the Future Workforce & Its Personas

# Today's Panelists



**Mimi Brooks**  
CEO



**Tanvi Kanakia**  
Managing Director,  
User Experience &  
Product Design

## Moderated By:



**Jessica Carroll**  
Institute Fellow  
Institute for Digital Transformation

# Today's Session

Strategic workforce planning needs to align with organizational capability planning in order to define the future workforce experience.

## We'll share how:

- To link strategic workforce planning and organizational capacity planning to the workforce of the future
- Worker profiles provide a tangible map for effectively building the new worker experiences needed in your transformed organization



## Presentation

- HR Strategic Imperatives
- Segmentation Approach
- Future Worker Personas



## Q&A

“Employee personas enable companies to understand employees not as ‘talent,’ ‘human capital,’ or ‘headcount’—but as humans who want and need to be engaged meaningfully if they are to perform their jobs well and contribute to the organization’s success in this new hybrid work world.”

- Denise Lee Yohn

*“Use Employee Personas To Design Employee Experience For A Hybrid Workforce”, Forbes, May 2021*

# HR Strategic Imperatives



# 7<sup>th</sup> Imperative

## Create the Future of Work Experience to accelerate transformation for workers

### Business Strategy & Operating Model

Future of Work Experience  
Optimizing Human Potential in New Work design

#### Employee Experience

- Employee Enablement
- Me as an Individual & a Member
- Culture-Communications-Connectivity-Collaboration = Digital Ways of Working
- Cross-disciplinary Teaming
- Personalization; Prediction
- Managers as Coaches in decentralized work

#### Worker Experience

- Humans optimized in Automated Work
- My Impacts to new Value Creation
- Enables Organization to be digital “at its core”
- Transdisciplinary Teaming
- Prevention; Situational Awareness
- Managers inspire Teams to contribute their best

Purpose – Culture – Growth Mindsets

Nancy Newbie	Freddy Feedback	Sarah Solo	Manuel Manager
			
<i>"I want to know how I'm doing and how I can improve."</i>	<i>"I just want to help everyone do their best work."</i>	<i>"I love new projects and new challenges."</i>	<i>"We should focus on people's strengths and interests."</i>
Time on Job: <b>6 months</b> Job Title: <b>Business Analyst</b>	Time on Job: <b>7 years</b> Job Title: <b>Tech Lead</b>	Time on Job: <b>4 years</b> Job Title: <b>Software Engineer</b>	Time on Job: <b>11 years</b> Job Title: <b>People Manager</b>
Nancy just started at Intel and she's very eager to do well. She periodically checks the feedback tool to see if she has received any new reviews.	Freddy feels very comfortable and proficient in his role. He sees himself as a mentor to junior engineers and cares about the product quality and the overall team performance.	Sarah loves her job. She loves problem solving, taking on new challenges, and learning new skills. Sarah hates tedious work like answering emails and tracking development hours.	Manuel cares about his employees and wants to help his employees grow based on their strengths, explore their areas of interest, and develop successful employees.
<b>Goals:</b> • Self improvement	<b>Goals:</b> • Team improvement	<b>Goals:</b> • Take on new challenges	<b>Goals:</b> • Improve team collaboration



**The Learner:**  
**Learning Drivers**  
Self-Directed  
Mandatory/Compliance  
Manager-Directed

**Frustrations**

Location  
Searchability  
Awareness

**Needs**

Single Source  
Learning Paths  
Pushed Content

**Insights**

**91%**

learn to get better at their job

**#2**

benefit of working at ACME are the opportunities to learn & grow

**71%**

want to learn about leadership

**Learning Environments**

  
Office

  
Field

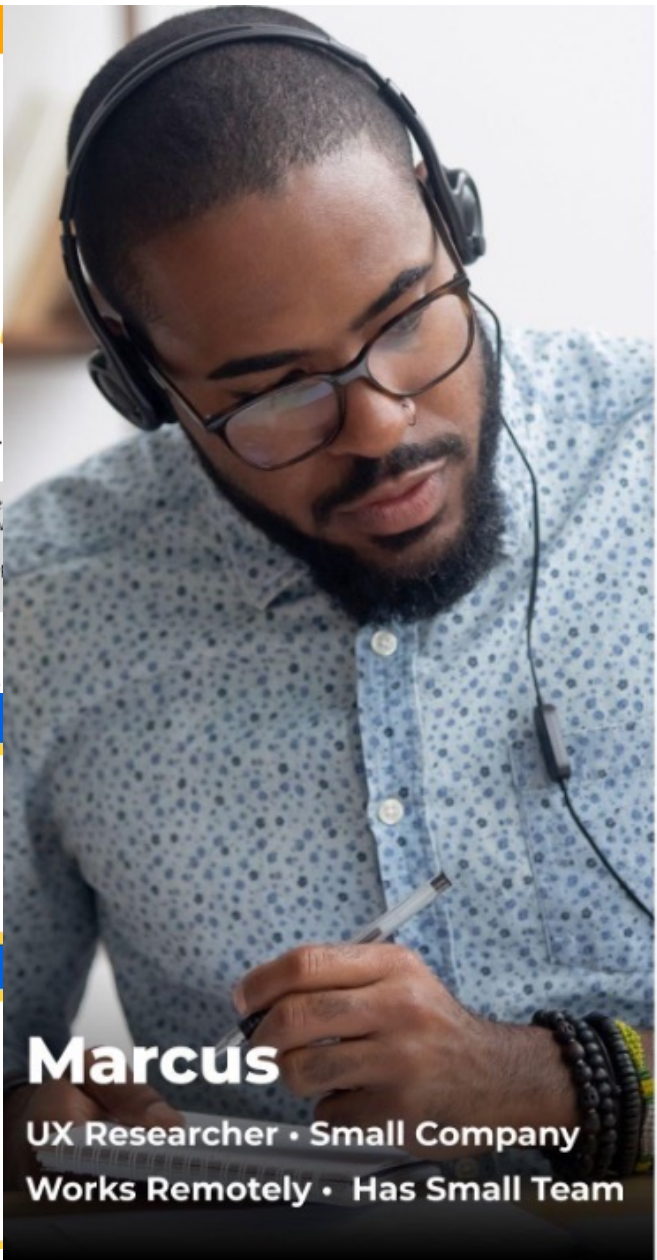
  
Home

**Barriers**

Time Issues

No Incentivization

Technology Limitations



**Marcus**  
UX Researcher • Small Company  
Works Remotely • Has Small Team

## About

Marcus is a UX designer who works for a small company. He has a small team and considers his work to be challenging. He conducts research in addition to designing digital products.

**"It feels just like I'm shoe-horned into creating this way to do it. And it's often clunky and overly complex."**

## Environment & Context

- **Home:** Often works from home, where he experiences interruptions from roommates.
- **Team Meetings:** Has to present his work during meetings. Wants to make a good impression, so he often speaks up.
- **Work:** Feels like he's constantly asking for help to make his job easier.

## Goals & Needs

- Reduce the awkwardness of remote interviews
- Find participants more easily
- Reduce the time to analyze and synthesize data
- Figure out a way to seamlessly move from one tool to another
- Ensure that he doesn't have to repeat the same information in different technology, like internet connectivity

## Hesitations & Pain Points

- Connectivity -- participant internet varies
- Process -- reading intro and moving to the next step is not a natural process online
- Analysis -- transcribing the data is manual and time-consuming
- Collaboration -- not easy to communicate during an interview, testing

# Our approach

In the strategy phase of the project

Current state and future state considerations

Informed by:

- Workforce data
- Industry understanding
- Work and work attributes
- Current state pain points
- Future state considerations
- Secondary research





# Segmentation Approach

## NATURE OF WORK

### Generalized roles

Routine work, low technical skill roles

### Specialized roles

Require technical know-how, BU specific work

### Strategic roles

Leadership roles, Cross functional work

## WORK ENVIRONMENT

### Hybrid Roles

variable work environments, access and access to primary devices required, Travel heavy roles

### Non-Desk Roles

Routine work Schedules network access and access to primary devices might be limited, variability in work setup/environment

### Desk Roles

consistent times of work, low variability in work setup/ environment, primary devices are the same, baseline network access

<b>Corporate office/ Business Unit office</b>	Roles such as: Call Center colleagues , Sales, Admin support, Member services	Roles such as: BU specific marketing, Pharmacy & Retail merchandizing, Colleague engagement, Medical affairs, Account Management, Operational Planning, Government services (Medicaid & Medicare), Network strategy and provider experience, Service operations, Call Center clinicians (pharmacist & dietitian techs, nurses) IT Colleagues	Corporate roles such as: Business & Enterprise Strategy, Digital, Consumer & Partner experience, HR, Transformation, Legal, Finance, Government affairs, Communications, Advice and Counsel, Executive Leadership
<b>Retail store</b>	Front store colleague (Out of first scope), Stock clerk, Store setup colleagues	Roles such as: Store manager, Pharmacy colleague, Pharmacy manager, Rx product development, Pharmacy ops Nurse practitioners, Physician's Asst	Corporate/BU and Field Leadership
<b>Distribution center/ Mail order facility</b>	Roles such as: Fulfillment/mail facility colleague, Front end processing colleague	Roles such as:, Pharmacists, Pharmacy techs, Visual merchandizers	Corporate and Field Leadership
<b>On road/ customer homes, clinical &amp; other environments</b>		Roles such as: Supervisors, Managers, Pharmacy Manager, Field nurses	Senior sales leadership, Branch Managers, Field Leadership

\*The model does not specifically account for contractors

Ratio of frontline colleagues per segment



Low

Moderate

High

# 1 Broad group demographics

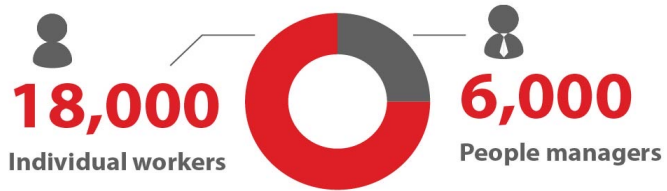
Information about the population, work environments and access

## Customer Facing Colleagues at Call center locations

Remote customer facing roles

Predominantly repetitive work with a mix of technical and non-technical roles

**Total number**  
**24,000**



### GROUPS SPECIFIC CONTEXTS:

Groups with high turnover rates:

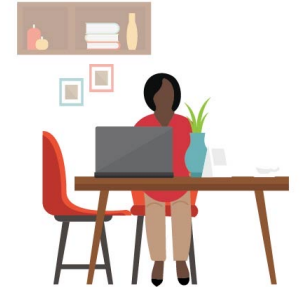
Non-technical roles - **80%**

Technical roles - **30%**

Locations they work from



Corporate Office

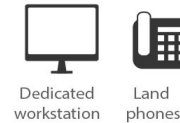


Home office

This group include roles such as



Devices they have access to



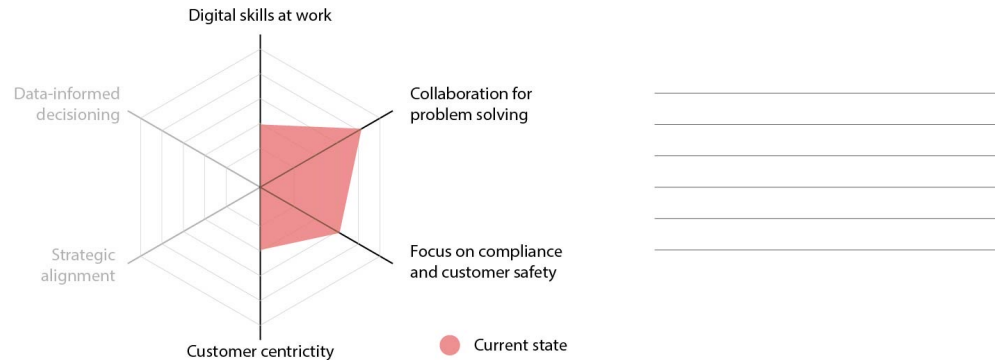
Devices they might have access to

# 2 Role based contexts

Baselining current state against desired future state  
Informs experience goals

Highlights contexts, barriers and needs that inform experience opportunities

## Desired Future State Work Practices and Behaviors




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**What does success look like in my work (and how it's measured)**

I solve people's problems in a timely fashion (Customer satisfaction)

I provide accurate information to customers (Customer Safety)

I am able to help as many customers as possible (Speed of delivery)

**DIGITAL SKILLS AT WORK**

**How I use digital:**  
Use of digital limited to work tools

**Barriers to using digital**  
"I can't check"

**Pain points of current digital**  
"

**I wish I had:**

**COLLABORATION FOR PROBLEM SOLVING**

Knowledge sharing Problem solving Networking

**Collaboration context and current channels of collaboration:**  
I need to quickly find people who can answer my questions - currently I do that by using XYZ

**Barriers:**  
"I don't have time to"

"I need to"

**I wish I had:**

**CUSTOMER CENTRICITY**

**What does customer centricity mean for me:**  
I need to make sure I'm helping customers but do it fast

**Barriers:**  
I take a long time to find things at my end between different systems

**I wish I had:**  
A way to connect with people faster so I could reduce customer wait times

**FOCUS ON COMPLIANCE AND CUSTOMER SAFETY**

I need to make sure I'm fully compliant and I'm suggesting the right things to people

I need to be sure of my information source

**Barriers:**  
I don't know if compliance rules change

**I wish I had:**  
A way to automatically notify me if I was not compliant

3

## Variability within groups

Informs sub-group variability that the experience needs to account for

4

## Group specific Contexts to consider

Informs sub-group variability that the experience needs to account for

<p><b>Barriers to using digital</b> "I can't check"</p> <p><b>Pain points of current digital</b> "</p> <p><b>I wish I had:</b></p>	<p><b>Channels of collaboration:</b> I need to quickly find people who can answer my questions - currently I do that by using XYZ</p> <p><b>Barriers:</b> "I don't have time to</p> <p>"I need to</p> <p><b>I wish I had:</b></p>	<p>I need to make sure I'm helping customers but do it fast</p> <p><b>Barriers:</b> I take a long time to find things at my end between different systems</p> <p><b>I wish I had:</b> A way to connect with people faster so I could reduce customer wait times</p>	<p>I need to be sure of my information source</p> <p><b>Barriers:</b> I don't know if compliance rules change</p> <p><b>I wish I had:</b> A way to automatically notify me if I was not compliant</p>
<p><b>Contexts, needs and pain-points vary by</b></p>			
<p><b>Device access:</b></p>			
<p><b>Work location:</b></p>			
<p><b>Nature of work:</b></p>	<p><b>+</b> "As a <b>clinical role</b> I need to ensure full compliance otherwise me and my company could be in legal trouble. I have no way to be updated with the latest compliance related procedures."</p>		
<p><b>Group specific variability</b></p>			
<p><b>HIGH TURNOVER RATES</b></p> <p><b>CHALLENGES:</b></p> <p><b>NEEDS:</b></p>			

# Profile Template

Information about the population, work environments and access

Baselining current state against desired future state  
Informs experience goals

Highlights contexts, barriers and needs that inform experience opportunities

Informs sub-group variability that the experience needs to account for

Current and future contexts that impact experience needs of the group

## 1 Broad group demographics

## 2 Role based contexts

## 3 Variability within groups

## 4 Group specific contexts to consider

**Customer Facing Colleagues at Call center locations**

Remote customer facing roles  
Predominantly repetitive work with a mix of technical and non-technical roles

**Total number: 24,000**

**18,000 Individual workers**      **6,000 People managers**

**GROUPS SPECIFIC CONTEXTS:**  
Groups with high turnover rates:  
Non-technical roles - **80%**  
Technical roles - **30%**

Locations may vary from home to work to home  
This group includes many workers  
Devices may be used from work to home

**Desired Future State Work Practices and Behaviors**

**What does success look like in my work (and how it's measured)**

- I solve people's problems in a timely fashion (Customer satisfaction)
- I provide accurate information to customers (Customer Safety)
- I am able to help as many customers as possible (Speed of delivery)

DIGITAL SKILLS AT WORK	COLLABORATION FOR PROBLEM SOLVING	CUSTOMER CENTRICITY	FOCUS ON COMPLIANCE AND CUSTOMER SAFETY
<p><b>How I use digital:</b> Use of digital limited to work tools</p> <p><b>Barriers to using digital:</b> "I can't check"</p> <p><b>Pain points of current digital:</b></p> <p><b>I wish I had:</b></p>	<p><b>Collaboration context and current channels of collaborations:</b> I need to quickly find people who can answer my questions - currently I do that by using XYZ</p> <p><b>Barriers:</b> "I don't have time to"</p> <p><b>I wish I had:</b></p>	<p><b>What does customer centricity mean for me:</b> I need to make sure I'm helping customers but do it fast</p> <p><b>Barriers:</b> "I take a long time to find things at my end between different systems"</p> <p><b>I wish I had:</b> A way to connect with people faster so I could reduce customer wait times</p>	<p>I need to make sure I'm fully compliant and I'm suggesting the right things to people</p> <p>I need to be sure of my information source</p> <p><b>Barriers:</b> I don't know if compliance rules change</p> <p><b>I wish I had:</b> A way to automatically notify me if I was not compliant</p>

Contexts, needs and pain-points vary by

Device access:	Work locations:	Nature of work:

\*No critical roles need to ensure full compliance  
Processes are not the primary goal here. Legal is a goal. There can be a lot of overlap with the latter depending on the situation.

Group specific variability

**HIGH TURNOVER RATES**

**CHALLENGES:**

**NEEDS:**



# Future Worker Personas

## Front line Employees

# Me (Now)

## About Me

51

Years old

13.6

Years in my current role

High School

Level of education

\$75K

A year salary

## People Like Me

94

Full-time CSRs

174

Partner-managed CSRs

33%

of total workforce

1:13

Supervisor to CSR ratio

0

Direct reports

7%:93

Male:Female gender ratio

4 Backoffice CSRs

2 Planners,  
2 Coordinators



## My View of Me

The customer is the center of my universe.

I am motivated & satisfied by solving customer problems.

I hold Integrity & Accountability in very high regard.

I enjoy the process towards reaching a goal more-so than the goal itself.

I like structure & don't readily welcome change.

My job can feel monotonous & I'd like to take on more complex projects.

## My Likes & Preferences

### Structure



"I like a predictable [daily] schedule."

### Socializing



"I miss the social connection [in the call center.]"

### Email Comms



"I rely on email to receive company news & [job-related] information."

## My Dislikes & Pet Peeves

### Restricted Web



"It's hard to do research [for a customer] when websites linked from our portal are blocked."

### Micromanagement



"I am motivated by trust from my [leadership] & dislike micromanagement."

### Ambiguity



"I am [troubled by] not knowing what my job will look like in 2 years."

# Factors Affecting Me in the Future

As we think about the role of the CSR in the future, these pillars provide the foundation upon which these changes occur...

## My Stories

3 stories that tell the CSR viewpoint today



## Workforce Trends

The effect of workforce trends on The Future CSR mentality



## Changing Nature of Work

The shifting environment, processes, and activities of CSR work



## Needed Capabilities

Needed Organizational Capabilities for The Future CSR

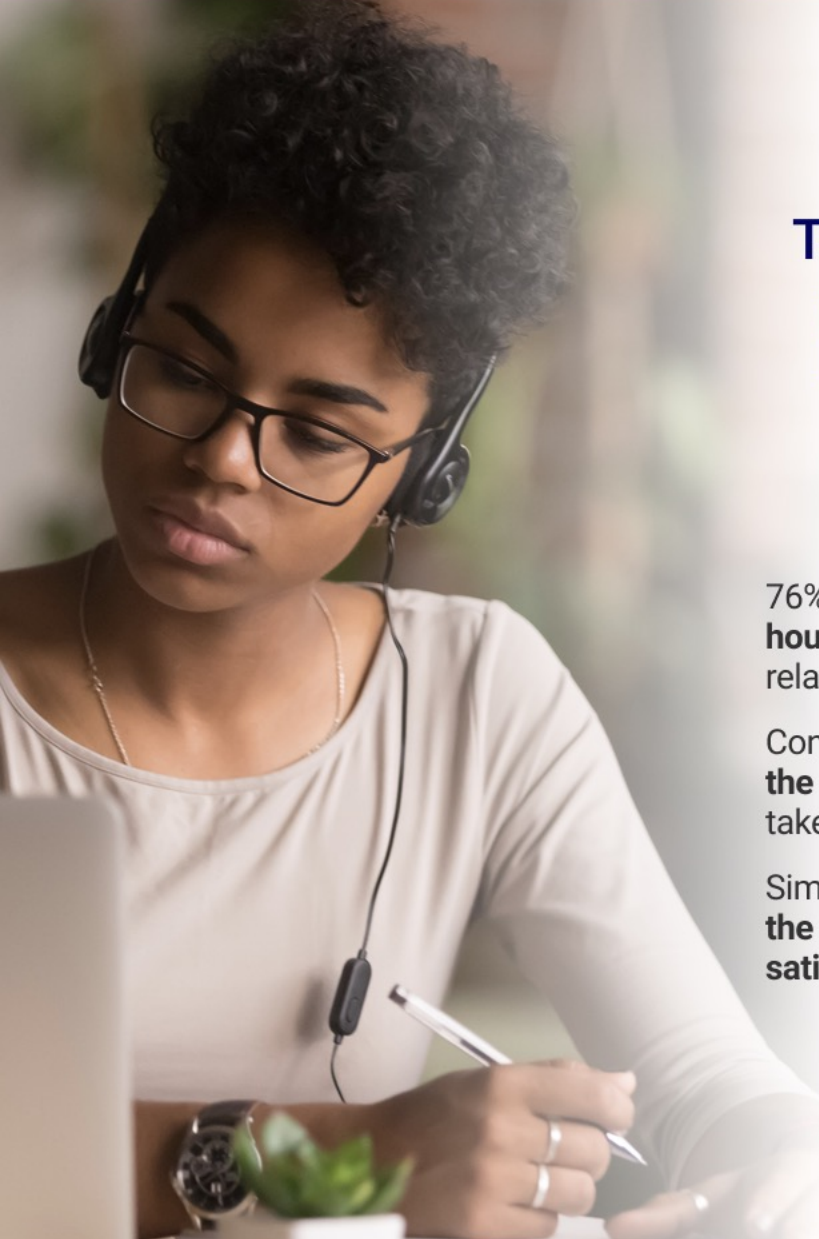


## My Relationships

Peer-to-Peer CSR Relationships in the future business ecosystem







## The Dichotomy of My Learning

Today, I do very little with regard to my learning pursuits.

76% of CSRs **spend less than 5 hours per month** learning things related to work.

Continual Learning **does not crack the top-10 list** of what CSRs think it takes to be **successful** today.

Similarly, learning **does not make the top-10 list** as to what is most **satisfying** to CSRs at work today.

I do, however, have some awareness of the importance of learning in the future.

Learning New Things was cited by CSRs as the **#1 success criterion** needed in the **future**.

80% of CSRs report “Learning” as their **#1 motivation** at work.

65% of CSRs believe that they need **to learn significant new skills** in order to do their jobs well in the next 2+ years.

For me today, this manifests itself as a desire to have greater diversity in current work assignments.

CSRs say that taking on a **greater variety of work** (#2) and working on different, **more complex projects** (#7) would increase their satisfaction at work in the future.

So while there may be a recognition or interest in Learning going forward, for today, a **more heterogeneous, less routine** workload is the prevalent interest among CSRs.



# The Customer Gives Me Purpose

## The customer gives meaning to me and to my job.

CSRs overwhelmingly report the **most satisfying part of their job** is helping customers (89%).

Solving customer problems is a primary source of CSR **motivation**

Solving customer problems and overcoming challenges constitute the **#2 spot** on the most **motivating aspects** of work for CSRs. This **tops Earning a Paycheck**, which comes in at #3 on the list.

## I seek validation from my customer interactions.

**Feeling valued** (i.e., hearing gratitude from constituents including customers) is the **#2 most satisfying** part of their job.

78% of CSRs **either never or only sometimes converse with their managers** about their learning pursuits.

CSRs are viewed as **homogeneous, interchangeable “parts”** in the customer service model today.

## This dictates how I define my success at work.

According to CSRs, **job success determinants are customer-centric** (e.g., active listening, problem-solving, first-call resolution).

The **top two** “must have” skills, as cited by CSRs, are the **desire to help customers** and the **ability to listen**.

Even CSRs’ two most important corporate values – **Integrity and Accountability** (85% of us rank these as top 2) – are customer centric. For example, a big part of having integrity means (to the CSR) **keeping promises** to the customer (e.g., following up via email).



# I See Myself as an Individual Performer

**I place great emphasis on autonomous work and self-reliance.**

CSRs ability to **work alone (#3)** and **make decisions alone (#4)** rank high on their list of **job success determinants**.

A **personal, positive attitude** and **personal resourcefulness** round out the skills-needed-to-be successful list at **#4 and #5**.

Working autonomously is **highly rated as a job satisfier**, as evidenced by CSRs' desire to WFH permanently and their dislike of micromanagement.

**My trusted knowledge sources primarily include myself.**

CSRs primarily rely on their **own trusted knowledge sources** – their own **personal knowledge** and their **own notes**.

Not surprisingly, CSRs are primarily **intrinsically motivated**. And CSR's strongest extrinsic motivator is **"control"** which is consistent with the behaviors of **storing & organizing one's own personal notes**.

When it comes to corporate values, CSRs hold **Integrity** and **Accountability** significantly above Diligence, Discipline and Perseverance.

**I seek out external knowledge sources only as secondary channels.**

Only after their personal resources do CSRs seek **people as trusted sources** – with peers and more senior CSRs outranking their CSR supervisor as preferred go-to channels.

**Company knowledge base ranks 3<sup>rd</sup>**, suggesting that CSRs trust this less than they trust their own knowledge.

Very **low value is placed on company communications** as a dominant trusted source (e.g., communications, handouts, email).



In a heavily changing industry and company, a variety of workforce trends affect the CSR. These emerging trends drive a change in needed mindset, from a Fixed Mindset to a Growth Mindset.

## Future Workforce Trends





CURRENT

## Routine jobs in a centralized location

- Traditional work environment
- Work in office
- Centralized, fixed environments
- Punch-clock
- Internal knowledge sources: Personal knowledge and fixed reserves (captured knowledge)
- Analog information assets (e.g., personal notes)
- Recent remote work is challenging (e.g., reliable connectivity and access to resources)

### Enablers

- Desire to take on more complex work
- Recognizes need to become more tech-savvy
- Enjoys social interactions w/ colleagues
- Interested in learning

### Disablers

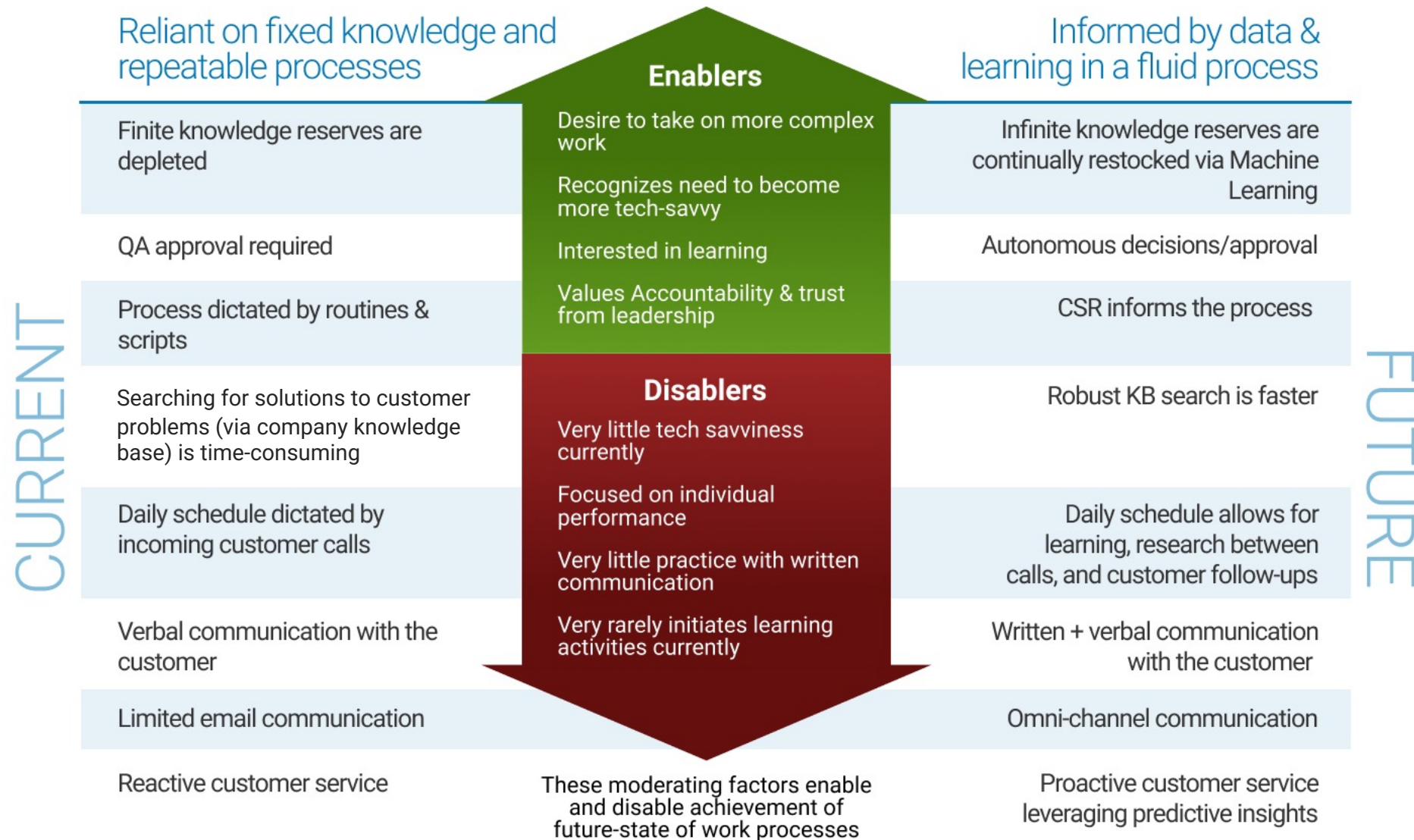
- Very little tech savviness currently
- Very little practice with written communication
- Likes structure
- Dislikes ambiguity
- Very rarely initiates learning activities currently

## Complex jobs in a hybrid location

- Amorphous, ambiguous environment
- Hybrid model (remote/office)
- Decentralized, portable environments
- Flexible hours
- External knowledge sources: More fluid, diverse knowledge flows
- Digital assets (e.g., Collaboration with digital assistants)
- Platform and environment support location independence

FUTURE

These moderating factors enable and disable achievement of the future state work environment



# Changing Nature of Work: Analysis of Work Activities

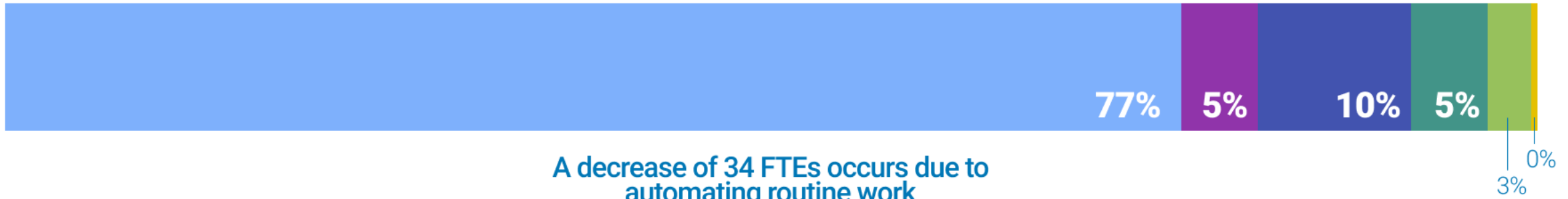


Future CSRs will spend more time on more diverse work and exerting a greater span of influence.

As automation kicks in and becomes the nature of new work, positive outcomes align and iteratively generate more positive outcomes.

## Current Work Activities (Where FTEs = 94)

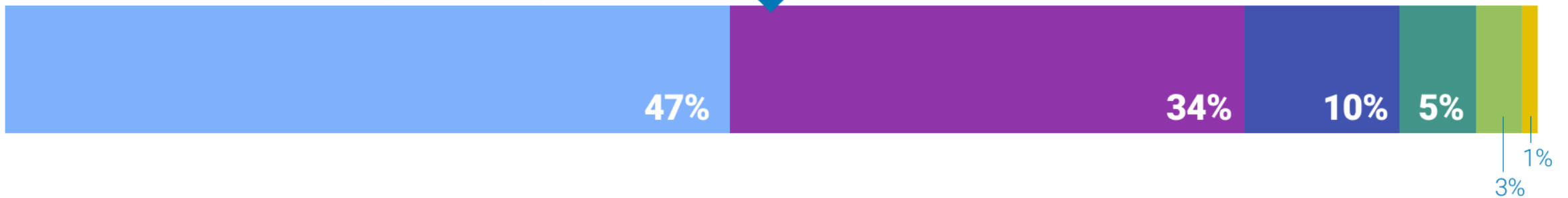
All values are percentages of time



A decrease of 34 FTEs occurs due to automating routine work



## Future Work Activities (Where FTEs = 60)



- Waiting/Responding to Customer Calls
- Proactive Outreach to Customers
- Internal/External Research to Support Customer Needs
- Collaboration with Peers
- Formal Training
- Continuous Practice Improvement (as real-time input to business analyst)



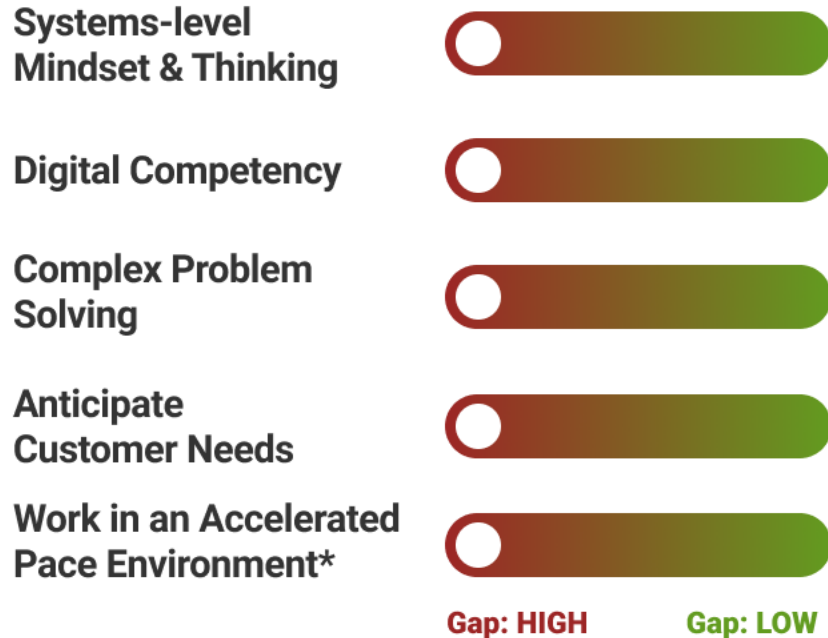
# Needed Capabilities



From a list of the most strategically relevant Organizational Capabilities, five (5) were selected as the most needed for The Future CSR. All were identified by the business as having high gaps between the current state and the future state.

A strategic workforce plan is needed to bridge these gaps. Leadership believes this plan should include the remediation efforts shown below.

## 5 Most Needed Capabilities



\* A digitally-centric environment (not necessarily more customer calls)

## Remediation Strategy

### Redefine the Role of CSRs

New job descriptions are underway to redefine the role (routine work to complex work).

### Transform the Workforce

Leadership plans to hire new staff, transition out some current staff, and change the partner-led model.

### Develop an Ongoing L&D Program

Leadership sees continual learning & development as an integral part of the future organization.

### Change the Organizational Structure

Leadership plans to reorganize to a regional model to create intimate familiarity with local customers and better cater to customer needs.

Impacts to the Front-line Supervisory Team include more authority, a greater worker-to-supervisor ratio, and ability to aggregate & solve issues without going outside CS (e.g., IT Help Desk).

Backoffice CSRs transfer out as Billing Analysts. Business Analysts increase in number and become Customer Service Specialists responsible for continuous practice improvement.



# My Relationships in the New Business Ecosystem



Interdependent relationships are a critical component of the new business ecosystem.

As a successful CSR participant in this new business ecosystem, I will give value to and receive value from my relationships.



# Me (In the Future)

## About Me

**Bachelor's Degree**  
Level of education

**\$75K**  
A year salary

## People Like Me in the Future

**6** CSAs (1 per region)

**60** Full-time Legacy CSRs

**70** Partner-managed CSRs

**1:10/1:15**  
Supervisor to CSR ratio

**4** Backoffice CSRs

## My Interests & Passions



## Customer Service Advisors (Front Line)

Able to advise customers of service options

Deep knowledge of industry

Advanced problem solving

Ability to provide front-line tech support

Digital "native"

Excellent communication skills (written & verbal)

High Emotional Intelligence

Focused on customer experience

Project management

Supported by Customer Service Specialists

# 🔄 The Experience That I Need

2020

My Work Environment

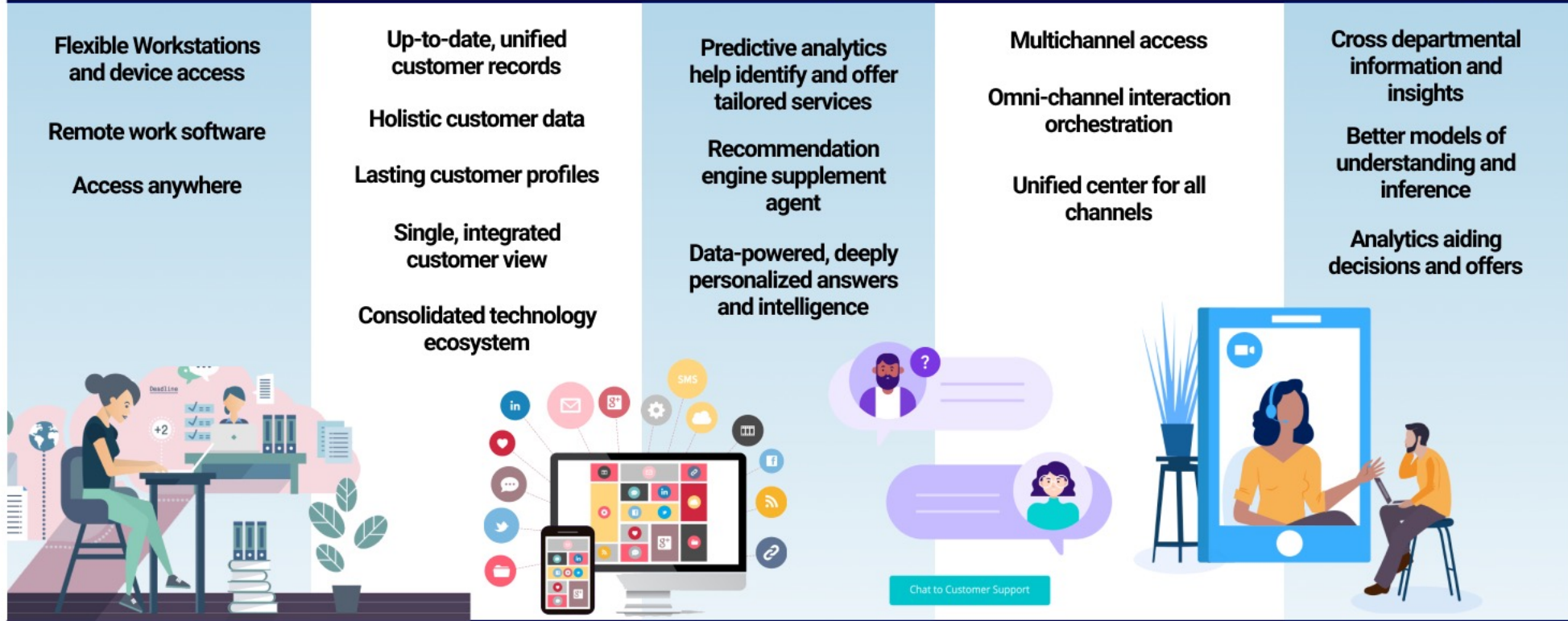
My Information Sources

I Problem-Solve Using

How I Communicate

My Decision Making

Impact Dimensions



Flexible Workstations and device access  
Remote work software  
Access anywhere

Up-to-date, unified customer records  
Holistic customer data  
Lasting customer profiles  
Single, integrated customer view  
Consolidated technology ecosystem

Predictive analytics help identify and offer tailored services  
Recommendation engine supplement agent  
Data-powered, deeply personalized answers and intelligence

Multichannel access  
Omni-channel interaction orchestration  
Unified center for all channels

Cross departmental information and insights  
Better models of understanding and inference  
Analytics aiding decisions and offers

Detailed Experience Implications Over Time

2030

Location Independent

Location independent, flexible work which can be done from anywhere including agents' home requiring access anywhere capabilities.

Multi-Channel Data sourcing

Customer profile data is pulled from multiple channels: social, web, chat, CRM, recordings etc.

Predictive Insights

Proactive customer service made possible by detailed data and analytics generated by a multi-channel center. Provide guidance and solutions by pre-empting bad experience.

Omni-channel Communication

From call center to a contact center. Blend of voice, video, text, email, chat and social media requiring omnichannel and integrated tools.

Increased Autonomy

Resolve issues independently. Have knowledge and insight across organizational verticals to make better decisions in real-time.

Outcomes

Experience Needs

# Strategic Workforce Roadmap



# Q & A



# Thank you

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