DESKLESS | 2023

The Deskless Report

Welcome to the 2023 edition of The Deskless Report

In the following pages, we'll explore the state of the frontline world by delving deeper into the worker, manager, and corporate leader experience – and what each of these groups need to thrive in the coming year.

In talking with these three cohorts, we've uncovered eight key insights that will ignite a discussion around the true definition of frontline enablement. What do deskless and frontline workers need to stay happy, productive, and loyal? What do frontline managers need to effectively lead their teams without daily burnout? And what do corporate leaders need to make the data-driven decisions to empower their workforce at scale?

The following pages will start to answer these questions – and spark the conversations and initiatives to continue addressing these issues through 2023, and beyond.

Enjoy!

What's in the report?

Executive Summary

42% of frontline workers are considering leaving their job *(up from 36% last year)*

39% of frontline workers feel heard by their organization *(down from 59% last year)*

75% of all respondents believe investing in new technologies for frontline workers will improve the success of their organization.

49% of frontline managers feel burned out on a daily basis

#1 The frontline manager is a critical intermediary – but they're overburdened and burning out

#2 The fundamental needs of workers aren't getting met *(because there's a misalignment on what matters most)*

#3 Fractured communication is prevalent in frontlines – and it is negatively impacting everyone

#4 Unstructured feedback is eroding the frontlines' trust and willingness to share *(but there's an untapped resource)*

#5 Technology is valued, but it's too focused on operationalizing and not focused enough on enabling

#6 Efficient execution is an indicator of an enabled frontline – but the drivers to get there are changing

#7 Training is functional, but dated – and needs to better align with frontline enablement

#8 Outlook is positive, but guarded *(especially at the frontline level)*

CORPORATE RESPONDENTS
268 LEADERS

FRONTLINE RESPONDENTS
385 MANAGERS
633 WORKERS

5 INDUSTRIES

What's the state of the frontline?
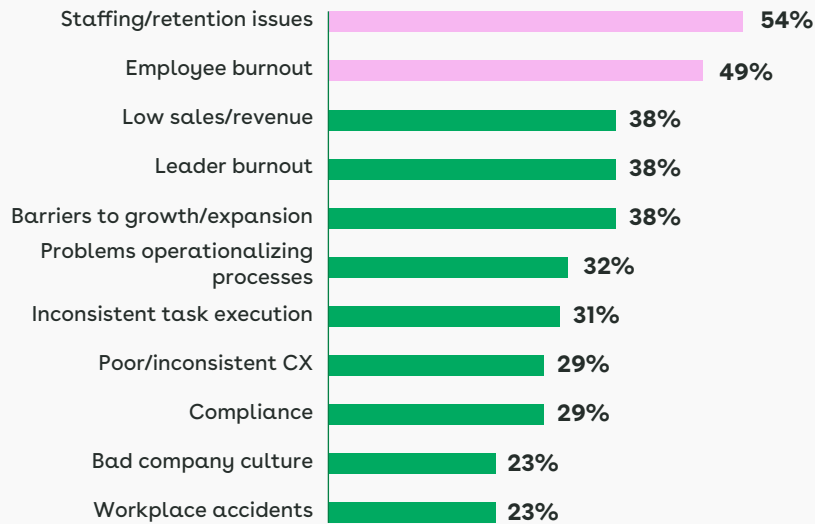
THE DESKLESS REPORT 2023 | WHAT'S THE STATE OF THE FRONTLINE?

DESKLESS

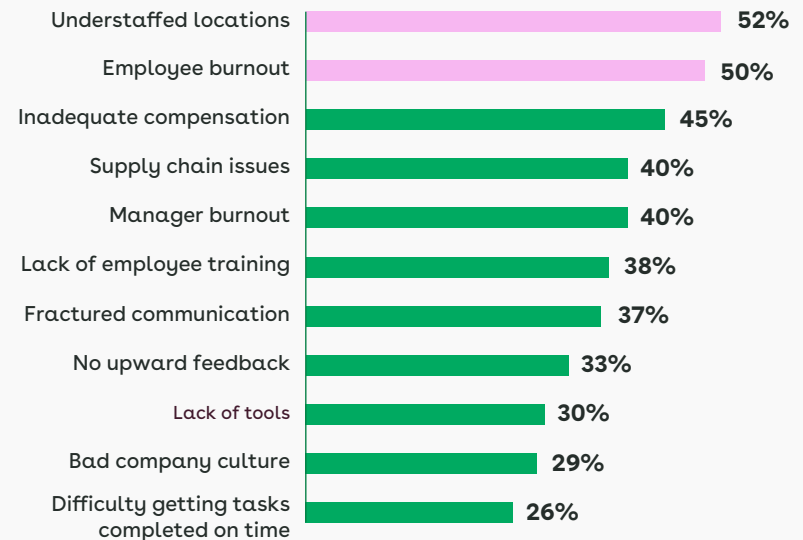# What's the state of the frontline?

As we begin to explore the current state of the frontline world, throughlines quickly appear across industries and audiences. When asked about the current challenges facing their industries, frontline workers, frontline managers, and corporate leaders all ranked staffing issues and burnout at the top of the list. Even as the pandemic becomes a (somewhat) past-tense concern, the key disruptors are still stability-related.

Disruptors ranked very or extremely challenging by corporate leaders

Disruptor	%
Staffing/retention issues	54%
Employee burnout	49%
Low sales/revenue	38%
Leader burnout	38%
Barriers to growth/expansion	38%
Problems operationalizing processes	32%
Inconsistent task execution	31%
Poor/inconsistent CX	29%
Compliance	29%
Bad company culture	23%
Workplace accidents	23%

Disruptors ranked very or extremely challenging by frontline managers and workers

Disruptor	%
Understaffed locations	52%
Employee burnout	50%
Inadequate compensation	45%
Supply chain issues	40%
Manager burnout	40%
Lack of employee training	38%
Fractured communication	37%
No upward feedback	33%
Lack of tools	30%
Bad company culture	29%
Difficulty getting tasks completed on time	26%

The worker experience

As we'll explore in a later section, the frontline worker is looking to meet their most basic needs regarding livelihood and stability. Inconsistent or fluctuating hours can prompt workers to seek additional hours from other income sources to make ends meet. However, these secondary jobs often have conflicting schedules with a worker's primary job, leading to further scheduling issues and absenteeism. When available hours at the primary job pick back up again, management will then hire more staff to cover all the shifts, which leads to even less hours for the original worker, thus perpetuating a never-ending cycle.

And with that cycle threatening livelihood and well-being, frontline workers' desire to quit has increased. Last year's report found that 36% of workers wanted to quit – this year, that number rises to 42%.

> **None of us are happy. Employees are burned out.**
>
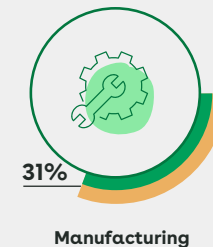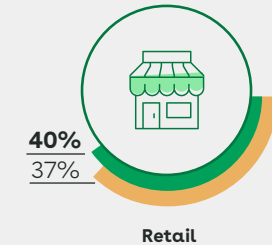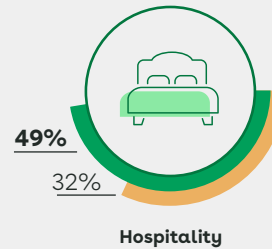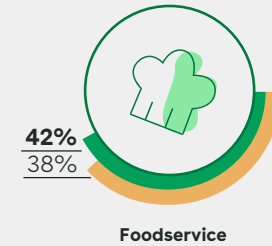> - Assistant General Manager, Regional foodservice chain
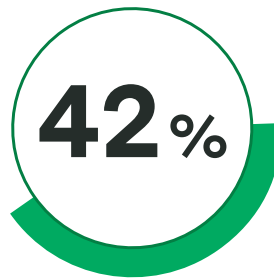
42%
of frontline workers want to quit their job

Workers that want to quit their job, by industry

■ 2022
■ 2021

51%
40%

Facilities Management

42%
38%

Foodservice

49%
32%

Hospitality

40%
37%

Retail

31%

Manufacturing
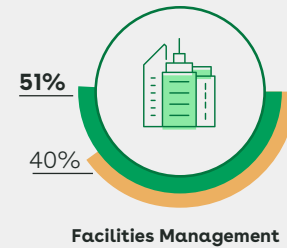
The manager experience

Meanwhile, frontline managers feel powerless to drive the change their organizations desperately need to grow and thrive. Thanks to ill-suited or outdated communication, feedback, training, and execution systems, they're shouldering a heavy load acting as the intermediary between corporate and staff. They're trying to bubble up feedback and employee insights while also communicating crucial information back to their staff and implementing cultural, product, and promotional initiatives – all while simply trying to stay afloat on a day-to-day basis.

> **There's a blurred line between managers and their roles. We're expected to take on roles we've never been trained for or that we don't really have experience in – so a little bit overwhelming.**
>
> – Customer Experience Manager, National retail chain

49%

of frontline managers
feel burned out
on a daily basis

The corporate experience

As a perfect storm of staffing issues, supply chain delays, inflation, and rising interest rates continues to impede growth and expansion, corporate leaders are torn between doing whatever they can to stay staffed and deliver quality customer experiences – and staying profitable.

This year, 54% of leaders cited staffing and retention issues as somewhat or very challenging, and employee burnout wasn't far behind. Following those is a three-way tie between low sales/revenue, leader burnout, and barriers to growth and expansion, suggesting they share a strong correlation, but are also disruptors that threaten to split focus.

> **We're struggling to keep people staffed.
> We've been getting killed with absenteeism.**
>
> - Operations and Logistics Manager, Manufacturing

65%
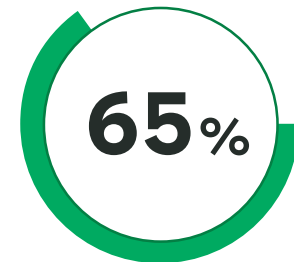
of corporate leaders
said the last twelve months at their job have been especially challenging

"Workers are desperate for stability, frontline managers are overburdened and burned out, and corporate leaders are trying to look to the future."

As a result, and as we'll explore later in this report, burnout among frontline managers is all too prevalent.

Clearly, the frontline world is still in an incredibly volatile state. Workers are desperate for stability, frontline managers are overburdened and burned out, and corporate leaders are trying to look to the future – but aren't sure of how to get there. What's the solution?

As readers will see in the insights that follow, it's the workflow that needs to change, not the frontline industries. For far too long, frontline workforces have been on the sidelines witnessing significant investments in deskbound tools, technology, and processes, with organizations struggling to apply them in frontline applications – like placing a square peg in a round hole. Sure, they've been tweaked or reskinned, but the processes remain deskbound by nature, purpose-built for workers in an office, at a desk, in front of

a computer. Onboarding, training, internal communication, employee feedback... The modern interpretations of these words are intrinsically deskbound. And as the frontline world becomes more and more volatile, its capacity to derive any functionality at all from these tools (or in fact the definitions themselves) is diminishing, fast.

In other words, it's time to redefine the frontline experience, once and for all. We need to strip it down to its studs and rebuild from scratch, asking ourselves again and again "What does this mean for the frontline world?"

In this year's Deskless Report, we have uncovered eight key insights that we hope will open up a discussion around redefining the concepts of manager enablement, communication, feedback, training, technology, and employee experience – a discussion we intend to continue in the months and years to come.

The frontline manager is a critical intermediary
– but they're overburdened and burning out

The role of the frontline manager in empowering and enabling a workforce has quickly become a trending topic in the frontline world. But this year's report exposed just how pivotal of a role the manager plays as intermediary between corporate and workers. Everything goes through them.

When workers were asked who they receive information from, the prevailing response for 8 of the 10 categories was "direct manager." But workers aren't just leaning on managers for information. More than 28% of workers said that 1:1 support from their manager contributes to their overall success and happiness at work.

Unfortunately, despite the pivotal role managers have to play in frontline enablement, they're overburdened. They're trying to keep their locations staffed and their staff happy, and without the right tools or infrastructure in place, they're leaning on ill-suited or even personal tools that belie any chance at work/life balance.

While we've established that workers are receiving the bulk of information from their managers, our findings also indicate that this information is getting delivered from managers to workers through systems that don't allow for the standardization, optimization, and tracking required for large-scale workforces.
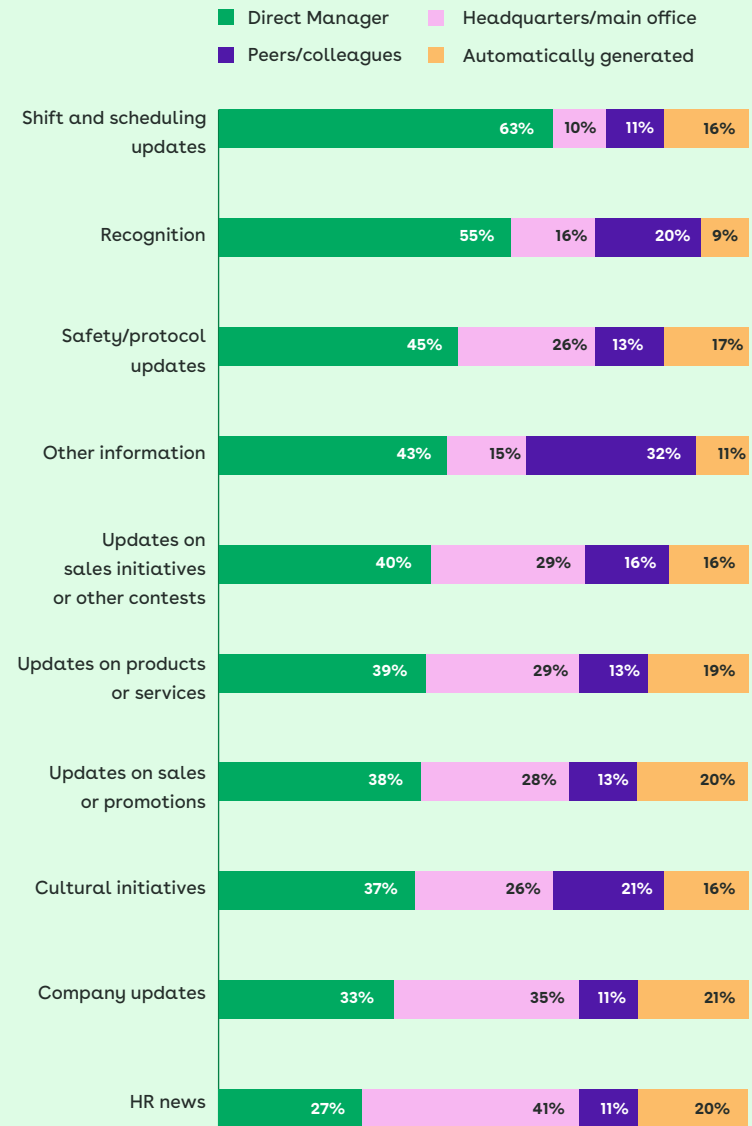
When asked how they receive information, the top three methods cited by frontline respondents were in-person conversations (67%), text/phone calls (56%), and email (54%). It's of course important for managers to talk to their staff directly, but leaning on these channels for disseminating all information puts a lot of strain on managers as they try to ensure the messages are getting through to everyone.

> **"Information is getting delivered from managers to workers through systems that don't allow for standardization, optimization, and tracking."**

These are the same three channels that workers indicate they use to deliver feedback back to their company. And that again leads to ineffectual information-sharing and a sense that valuable insights and feedback aren't finding their way to the right people.

Furthermore, there's a concern among managers about the **results** of the feedback they share. The large, sweeping initiatives that are implemented and shared back down to frontlines feel misaligned against the original feedback or concerns, and managers feel like corporate is out of touch with the "day-to-day chaos" of the frontline experience.

Who are workers receiving information from?

Legend:
- Direct Manager (green)
- Peers/colleagues (dark purple)
- Headquarters/main office (pink)
- Automatically generated (orange)

| Category	Direct Manager	Headquarters/main office	Peers/colleagues	Automatically generated
Shift and scheduling updates	63%	10%	11%	16%
Recognition	55%	16%	20%	9%
Safety/protocol updates	45%	26%	13%	17%
Other information	43%	15%	32%	11%
Updates on sales initiatives or other contests	40%	29%	16%	16%
Updates on products or services	39%	29%	13%	19%
Updates on sales or promotions	38%	28%	13%	20%
Cultural initiatives	37%	26%	21%	16%
Company updates	33%	35%	11%	21%
HR news	27%	41%	11%	20%

"

Corporate tried to roll out a core values thing. They invested a lot in it, but they're working in the corporate office. They want to get people excited about things that people don't care about.

- Assistant General Manager, Regional foodservice chain

"

Managers are provided some information and context about these initiatives, but not enough to get their buy-in, let alone arm them with the information they need to get their staff on board, so a lot gets disregarded. They're taking on the brunt of onboarding and employee training, tasked with not just skills and knowledge transfer but engagement and retention, all while trying to operationally execute.
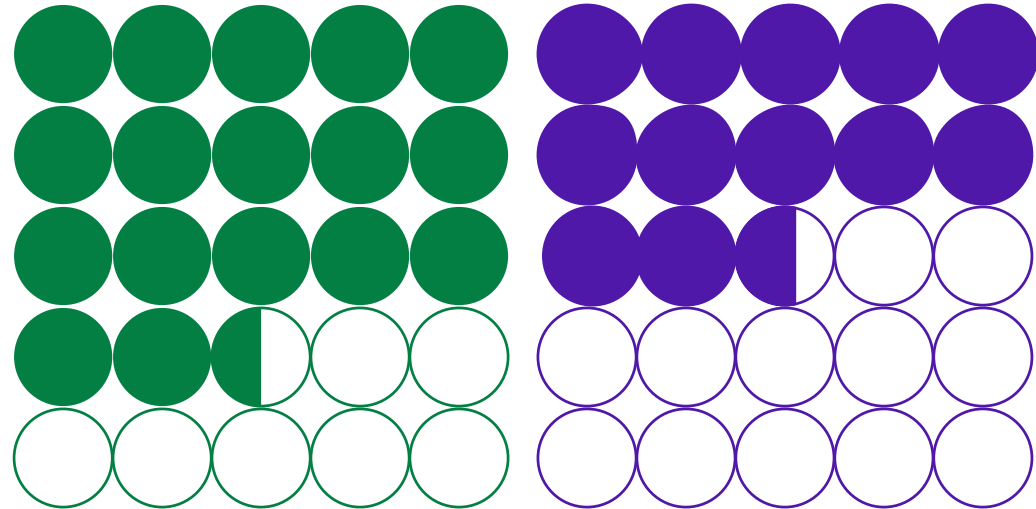

70%

of frontline managers feel in-the-know about of what's going on at their organization, while **only 51% of frontline workers** agree

"49% of frontline managers are feeling burned out on a daily basis."

All of this naturally leads to burnout. Particularly in the aftermath of the pandemic, managers are battling ongoing absenteeism and sickness, disengagement, and overall staffing concerns. They're using personal communication channels and apps (not company-sanctioned) to reach their staff and keep shifts covered, further diminishing any work/life balance or separation. As a result, 49% of frontline managers are feeling burned out on a daily basis.

While this is worrisome, it also indicates an exciting opportunity for organizations. Frontline managers are a resource that organizations can leverage to drive execution, engagement, and retention, but they need to be enabled and empowered to do so. And, the research shows that forward-looking organizations see it. Of the corporate leaders polled, 42% said their investment in enabling and training their managers has increased. With the right structured approach in place – let's call it "frontline management enablement" – organizations can bolster frontline managers with the resources and tools they need to avoid burnout and optimize output.

Instances of daily manager burnout, by industry

54%	54%	52%
Retail	Hospitality	Manufacturing

48%	37%
Foodservice	Facilities Management
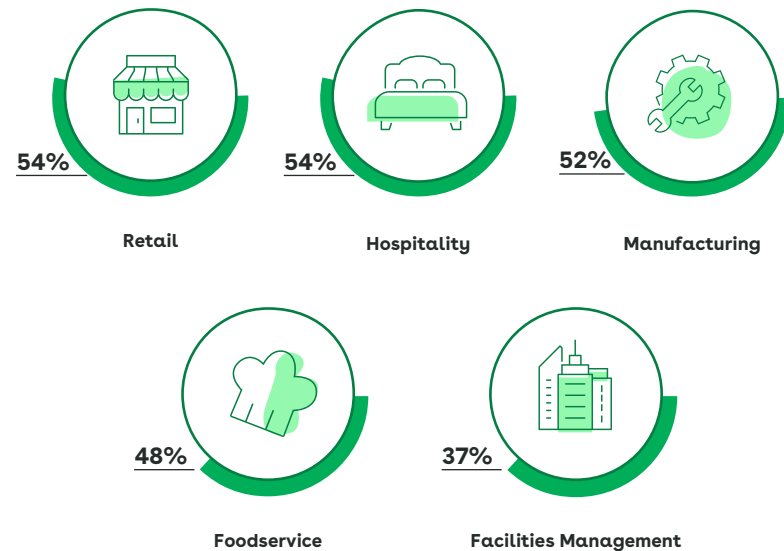
The fundamental needs of workers aren't being met
(because there's a misalignment on what matters most)

Often, organizations are encouraged to start with "the why" when communicating with frontline staff. But today we're going to suggest something new: To truly engage, inspire, and retain frontline staff, fundamental needs must be addressed before the why.

While corporate is advocating for initiatives that target community and culture (both of which are crucial drivers of success and happiness), workers are still struggling with more fundamental needs around livelihood and stability. Until these more fundamental needs are met, frontline workers will struggle to participate, accept, or see value in more peripheral initiatives.

Frontline vs corporate perceptions on the top drivers of frontline happiness and success

🟩 Frontline Workers   🟪 Corporate Leaders

Driver	Frontline Workers	Corporate Leaders
Equitable compensation	48%	53%
A strong employee community	46%	37%
Empathetic leadership	41%	36%
Recognition	39%	45%
Adequate training and upskilling	38%	43%
Adequate technology and tools	34%	32%
Perks	34%	25%
Clear communication from the head office	33%	41%
1:1 support from frontline managers	28%	24%
Clear understanding of company values and vision	27%	29%
Access to PPE and other safety equipment	18%	17%
Strong feedback loops	16%	18%

On the following page, we'll look at workers' needs as a hierarchy. At the base of the hierarchy, workers need a Livelihood, i.e., the means to support themselves and their household. A livable wage is fundamental, followed by a thriveable wage. Benefits and perks are considered value-added to this, but do not substitute for the baseline. Right above the base is Stability: The confidence that your livelihood is relatively secure. This is driven by consistent income, hours, a consistent work schedule, and the assurance that your job isn't going anywhere.

From there, we see Community, a camaraderie between employees and between frontline workers and their managers that help create a sense of belonging, mutual respect, accountability, and investment. Frontline managers interviewed noted the benefit of a "work hard, play hard" ethos, where the enjoyment of professional relationships inside and outside the workplace is directly tied to the mutual support employees provide by doing their jobs effectively and consistently.

Access to top 5 success drivers according to frontline workers

43%	**62%**	**62%**	**64%**	**64%**
Equitable compensation	Adequate training and upskilling	Empathetic leadership	Strong employee community	Recognition

The Hierarchy of Frontline Workers Needs

What breaks it down

- Lack of communication from head office
- Too much focus before below needs are met

- Lack of employee community
- Manager burnout
- Absenteeism

- Inconsistent hours/scheduling issues
- Lack of training/upskilling
- No scheduling tools

- Low wages
- Lack of benefits/perks

Culture

Community

Stability

Livelihood

What builds it up

- Strong brand vision and values
- Strong communication

- A sense of camaraderie/investment
- Empathetic leadership
- Recognition

- Consistent hours and income
- Upskilling/employee development
- Feedback tools

- A livable wage
- Benefits/perks
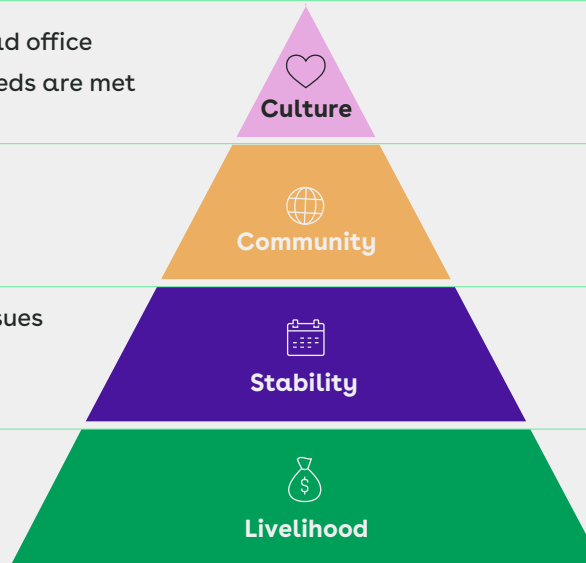
43% of frontline workers don't have access to equitable compensation

40% of frontline workers don't have access to strong feedback loops

64% of frontline workers have access to a strong employee community

72% of frontline workers have a clear understanding of company values and vision

Culture is at the very top. Here's where we get into "the why" that workers need to execute effectively and efficiently. Culture includes a broadly shared sense of mutual values, vision, and ideals and is a nebulous and abstract concept compared to the more tangible and immediate needs of Livelihood, Stability, and Community. As such, values and mission statements only resonate when the foundations of the pyramid are provided and secure. When the above needs are not fully met in frontline environments (which is the case according to the majority of frontline interviewees), building a broader sense of company culture becomes ineffective at best and insulting at worst, especially when culture initiatives are prioritized over fundamental needs.

Worker sentiment on the employee experience

I know exactly what's expected of me at work	85%
I have the information I need to do my job	79%
I understand my company's long-term goals	63%
I feel a sense of community with my coworkers and organization	60%
I am in-the-know about most of what's going on in my organization	51%
I feel like my organization invests in my development and growth	42%
I feel heard by my organization	39%

We furthermore see what's most top of mind for workers when we review the biggest challenges to day-to-day work, as mentioned in the report's introduction. The top three most significant challenges to frontlines were understaffing, employee burnout, and inadequate compensation.

"Workers know what they need to do. That's not the problem. The problem is that they're coming to work scared, overworked, and burned out."

Meanwhile, "difficulty getting tasks done" was the least-ranked challenge among workers, which aligns with the fact that 85% of frontline workers and 89% of frontline managers feel that they know exactly what's expected of them at work.

In other words, they know what they need to do. That's not the problem. The problem is that they're coming to work scared, overworked, and burned out. So, how can organizations begin to build out that foundational base layer that workers need? We've identified three core drivers.

89%
of frontline managers feel that they know exactly what's expected of them at work, and **85% of frontline**

Consistency

Total worker compensation is strongly impacted by inconsistent scheduling and shortage of work. Prioritizing and investing in consistency through scheduling tools and other automated functions could reduce the strain workers are feeling around instability and inconsistency.

Upskilling

There's a strong worker desire (and a real ROI) for robust upskilling programs. Upskilling builds that foundation of livelihood and stability for workers, opening up more opportunity for internal growth and career pathing.

Empathy

We're seeing a strong sentiment at the frontline level that corporate leadership isn't in touch with the "day-to-day chaos" frontline workers are faced with on a regular basis. This feeling is leading to resentment, which erodes workers' willingness to engage and contribute to programs that will continue to build up a foundation in their hierarchy of needs. Embedding a strong sense of empathetic leadership at the top of frontline organizations could play a pivotal role in reducing turnover and building strong, trusting relationships.

Fractured communication is prevalent in frontlines
– and it is negatively impacting everyone

The communication cascade at frontlines remains surprisingly similar to that of deskbound companies. This top-down approach to communication continues to be shoehorned into frontline infrastructure. But as these industries grow increasingly volatile, navigating operational changes, staffing challenges, and supply chain constraints at a breakneck pace, top-down frontline communication may have finally come to a breaking point.

Our research found that with such a different infrastructure than deskbound organizations, this top-down system of information sharing creates a lose-lose-lose situation where no one along the chain – from workers to managers to corporate leaders – gets what they want or need.

With top-down communication in place at the corporate level, head office loses all semblance of data that can inform senior leadership about what's being read, what's resonating, and what's falling flat.
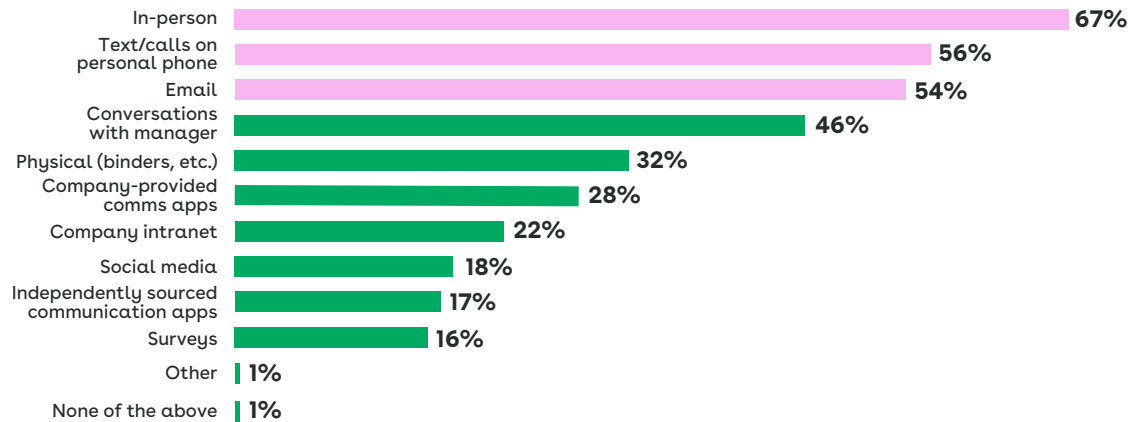
Top-down communication

Information is shared down the organization from head office to functional leadership to managers to workers via email or word-of-mouth, with little opportunity for tracking clear data on who information has reached and whether they understand it.

Ad-hoc communication

Information is shared informally from managers to workers, or vice versa, through personal channels not sanctioned by the company, like texting, WhatsApp messaging, or via personal emails.

With the large workforces that frontline organizations employ, there's a wealth of information that can be used to fine-tune messaging, improve task and campaign execution, and even predict turnover. There's also a massive opportunity to tap into the frontline perspective on the insights they're communicating, which can lead to continuous improvement and improved business outcomes (we'll dive more into feedback in the next section).

How frontline managers and workers receive information

Channel	Percentage
In-person	67%
Text/calls on personal phone	56%
Email	54%
Conversations with manager	46%
Physical (binders, etc.)	32%
Company-provided comms apps	28%
Company intranet	22%
Social media	18%
Independently sourced communication apps	17%
Surveys	16%
Other	1%
None of the above	1%

> **We don't have a good system. We try to email, but 60% of people don't check it. We run 24/7, but we don't have time built in to do communication meetings. All meetings are voluntary and happen during breaks. To know people read and understand the things we post is very difficult."**
>
> - Operations and Logistics Manager, Manufacturing

But first, you have to be collecting it, and with traditional top-down communication channels, like email, organizations are severely limited in the information they can collect.

There's also a risk of "broken telephone," where information is filtered from person to person down the organization, leading to misinterpretations and inconsistencies.

"There's a danger of top-down communication not having any confirmation that information is being read or understood. One manager called it 'sending information into the abyss.'"

At the managerial level, the communication channels being employed are not only top-down, they're also ad-hoc. In-person communication, texts/phone calls, and emails are being used to "keep the business going," and "stay afloat," with managers focused on covering shifts and quickly sharing tactical information. Let's explore these communication channels in more detail.

> **[Communication] usually starts with our general manager, then it's disseminated throughout the employees. But a lot of times it doesn't get all the way down to where it needs to.**
>
> - Soft Lines Manager, National retail chain

In-person communication

While this form of communication will always be necessary for the most urgent, real-time items (like a major spill that needs cleaning up, for example), it's problematic for anything that needs to be thoroughly understood and retained. According to the Forgetting Curve, when information is only shared once, workers will forget 50% of it within an hour – and 90% will be lost within the week.

Texts/calls on personal phone

The inherent issue with sharing critical communications on personal devices is that it's completely outside the control of the organization, meaning there's no reporting or analysis of effectiveness available. There's also a sense of this communication channel blurring the work-life balance too much, which can lead to further burnout.

Email

A recent SlickText study found that over 60% of office workers ignore emails at work, and chances are that this stat is exponentially higher for frontline workers who often don't have access to a computer while on-shift. When the information being shared is long-form or in-depth, it's especially unlikely that frontline workers will have the time or capability to consume and retain the information.

For all three of these channels, there's the danger of not having any confirmation that information is being read or understood. One manager called it "sending information into the abyss."

Workers also simply don't find this top-down communication effective. When asked on a scale of 1 to 10 how effective their organization's communication is, 65% of corporate leaders scored their communications an 8 or higher, while only 35% of workers did the same.
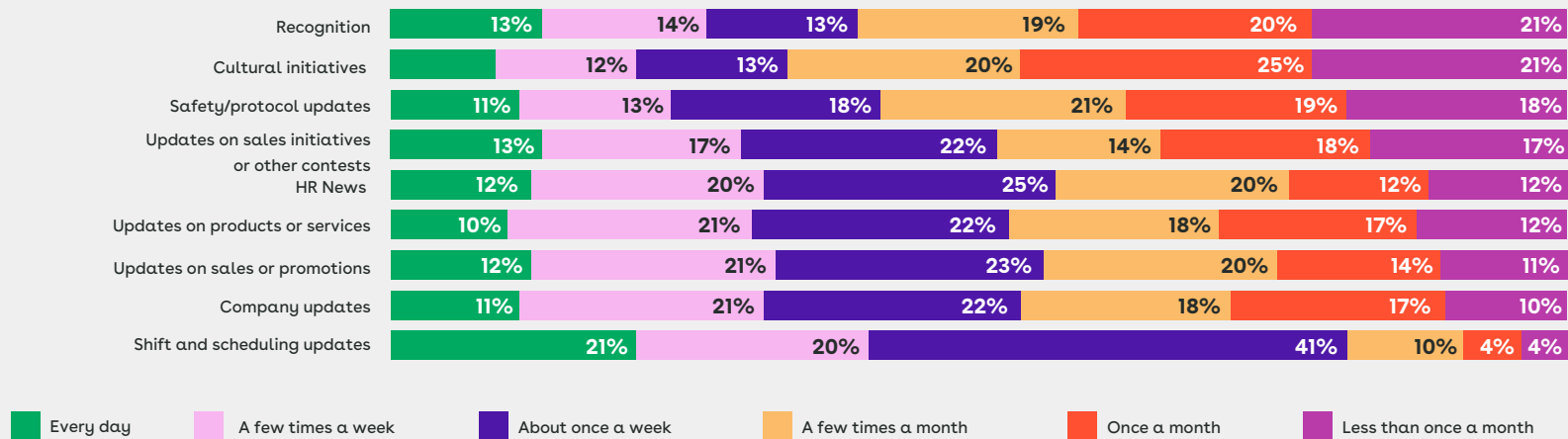
One reason workers might be finding communication ineffective is the frequency. The only communication type regularly shared daily is shift and scheduling updates; all other communication types were more commonly shared once a week or, in the case of recognition and cultural initiatives, once a month.
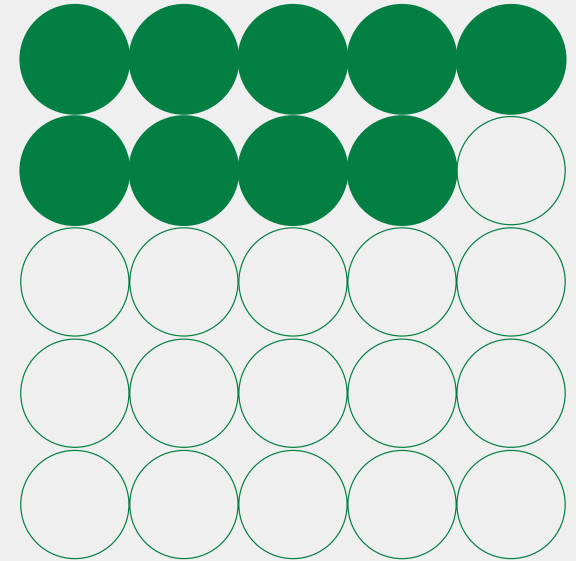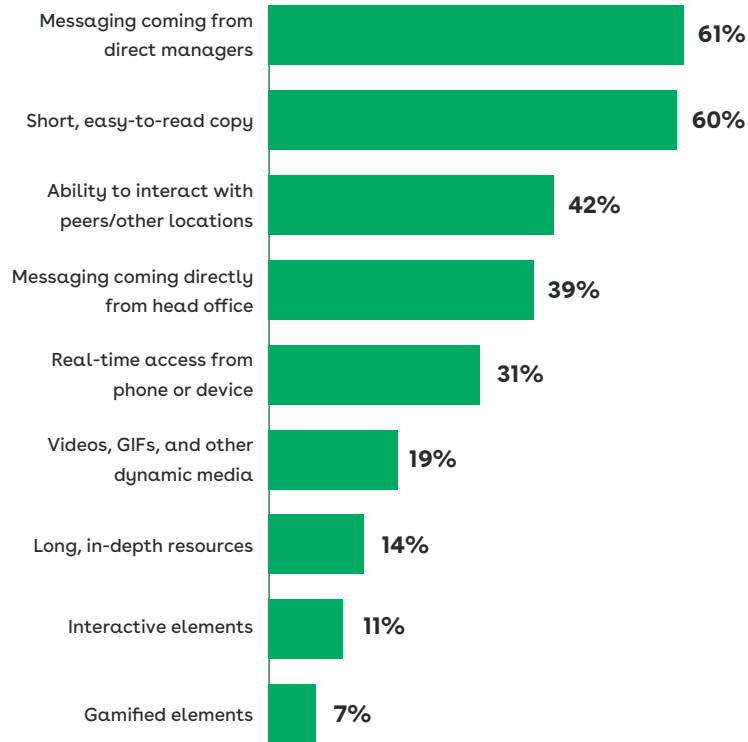
Another issue might be the fractured nature of frontline communication, thanks to a dangerous concoction of ad-hoc channels and indirect cascades. As we already discussed, information is coming to workers through a range of channels and sources, including peers, direct managers, head office, and automated sources. As a result, 37% of frontline respondents said that fractured communication was very or extremely challenging to their day-to-day work.

65%

of corporate leaders believe their communication is effective, while **only 35% of frontline workers** agree

Frequency of communications sent according to frontline workers and managers

	Every day	A few times a week	About once a week	A few times a month	Once a month	Less than once a month
Recognition	13%	14%	13%	19%	20%	21%
Cultural initiatives		12%	13%	20%	25%	21%
Safety/protocol updates	11%	13%	18%	21%	19%	18%
Updates on sales initiatives or other contests	13%	17%	22%	14%	18%	17%
HR News	12%	20%	25%	20%	12%	12%
Updates on products or services	10%	21%	22%	18%	17%	12%
Updates on sales or promotions	12%	21%	23%	20%	14%	11%
Company updates	11%	21%	22%	18%	17%	10%
Shift and scheduling updates	21%	20%	41%	10%	4%	4%

Legend: ■ Every day ■ A few times a week ■ About once a week ■ A few times a month ■ Once a month ■ Less than once a month

What would make communication more helpful? Frontline respondents ranked short, easy-to-read copy high on the list, as well as the ability to interact with peers and other locations. They also favored receiving information directly from managers as opposed to head office.

What frontline respondents say would make communications more helpful

|	
Messaging coming from direct managers	61%
Short, easy-to-read copy	60%
Ability to interact with peers/other locations	42%
Messaging coming directly from head office	39%
Real-time access from phone or device	31%
Videos, GIFs, and other dynamic media	19%
Long, in-depth resources	14%
Interactive elements	11%
Gamified elements	7%

37%

of frontline managers and workers believe **fractured communication** Is very or extremely challenging to their day-to-day work

"Technology can embrace that ad-hoc and in-the-moment communication, but harnessed into a more consistent and scaled-up approach."

In terms of the least requested features, interactive and gamified elements were at the bottom of the list. This could relate to frontline respondents wanting no-frills, simple communications, but the lack of interest in gamification and interaction could also be simply because it isn't applicable to the prevalent communication types (like texting and emails).

The reality is that frontline workers are filling the communications gap, at least to the frontline manager, by using their personal devices – because they are lacking a company-sponsored alternative. Nearly 78% of frontline respondents said they check their phone at work, whether or not it's allowed. Frontlines are making do with the technology they have and supplementing it with whiteboards and bulletin boards.

But there is tremendous opportunity here, because 41% of frontline managers and workers said they would like to use technology to address fractured communication. Organizations willing to implement systems that are optimized for the fast-moving deskless workforces will better enable their frontline managers and deliver the clear messaging and interactivity workers crave.
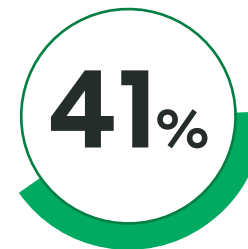
41% **of frontline managers and workers** would like to use technology to fix fractured communication

Technology can consolidate these channels to allow for one fluid (company sanctioned) channel for information to flow down – and back up. This allows for organizations to scale up communications, delivering information to the frontline more directly, with the analytics in place to measure effectiveness and knowledge retention company-wide. Technology can also embrace that ad-hoc and in-the-moment communication, but harnessed into a more consistent and scaled-up approach, reducing the load on managers and opening up opportunities for continuous feedback loops in one place.

Unstructured feedback is eroding the frontlines' trust and willingness to share
(but there's an untapped resource)

Unstructured feedback is surprisingly common among frontlines. According to our findings, the most common channels used to share feedback are in-person and via email.

Again, there's a prevalence toward feedback channels where frontline workers share their feedback, ideas, or concerns anecdotally with their manager, who then tries to bubble up these insights to their manager, and so on, like a reverse communication cascade.

As we've already explored, the manager-as-intermediary is put in a difficult position. As the primary contact between frontline employees and corporate, frontline managers felt it was difficult to find enough time to surface feedback, not to mention source answers to questions and other necessary information.

Structured feedback

Structured feedback is solicited using targeted surveys or other process-driven feedback channels. It's usually a specific question, with quantifiable answers (e.g., a pulse survey on a particular topic).
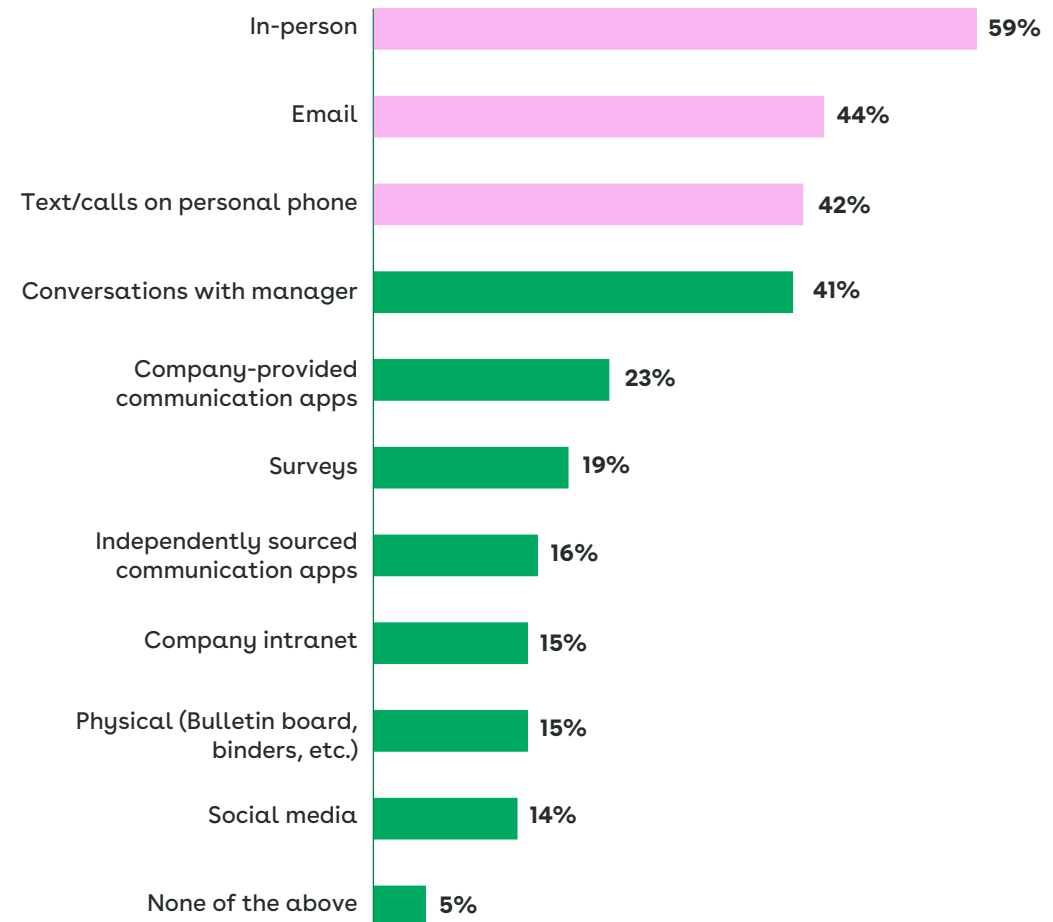
Semi-structured feedback

Semi-structured feedback involves leading questions or topics, with unlimited possible answers or comments (e.g., a virtual forum on a specific topic).

Unstructured feedback

Unstructured feedback is collected in an anecdotal, ad-hoc fashion, without any question or topic guiding the conversation (e.g., a worker telling their manager a frustration at the end of their shift).

How frontline managers and workers share feedback

Channel	Percentage
In-person	59%
Email	44%
Text/calls on personal phone	42%
Conversations with manager	41%
Company-provided communication apps	23%
Surveys	19%
Independently sourced communication apps	16%
Company intranet	15%
Physical (Bulletin board, binders, etc.)	15%
Social media	14%
None of the above	5%

Furthermore, the types of feedback collected again skew toward "traditional" HR-focused feedback, like problems with co-workers or safety concerns. While these are important, they miss the breadth of valuable feedback that is available to be sourced from the frontline and could be delivered back up to corporate. And if organizations are only asking for HR-focused feedback geared toward compliance and mitigating liability, a lot is going to be left unsaid.

As the following chart shows, the top types of feedback frontlines are motivated to give are, in fact, the ones that could truly help frontlines drive revenue, improve CX, and create efficient processes. Efficiency/protocol feedback and best practice sharing tied for first place on the list, followed closely by customer/guest experience and health and safety concerns.

"The top types of feedback frontlines are motivated to give are, in fact, the ones that could truly help frontlines drive revenue, improve CX, and create efficient processes.'"

It's not surprising to see that these frontline-focused types of feedback are less commonly collected, because they become harder and harder to surface and share through the ad-hoc systems being used in unstructured channels, especially if they rely on the already overstretched frontline manager to do so. To achieve the operational benefits that can be derived from thousands of customer insights, best practices, and efficiency recommendations, organizations need the processes, tools, and technology in place that structured feedback can provide. This approach allows them to collect, catalog, and action the feedback at scale.

Unfortunately, the investment just isn't there.

> "
>
> **We call it bubbling it up to corporate, when we go up the chain and try to get some movement on things. It can be like playing telephone, since we don't have direct communication with some of our corporate higher-ups. We can communicate to our district manager, our director of store operations, but at some point they're going to pick what they feel was most important in our conversation, and they'll bubble that up. So sometimes you don't always feel your message actually gets across.**
>
> - General Manager, Regional retail chain
>
> "

According to corporate leaders polled, 16% have no budget allocated for feedback and 18% said their feedback budget has decreased. While these numbers might seem low, they were the highest across a range of enablement initiatives, suggesting that feedback is getting deprioritized against communication, training, recognition, and other programs. A surprising insight, considering that when asked, "How do you know when your staff has what they need to succeed?" almost 71% of corporate leaders said "employee feedback."
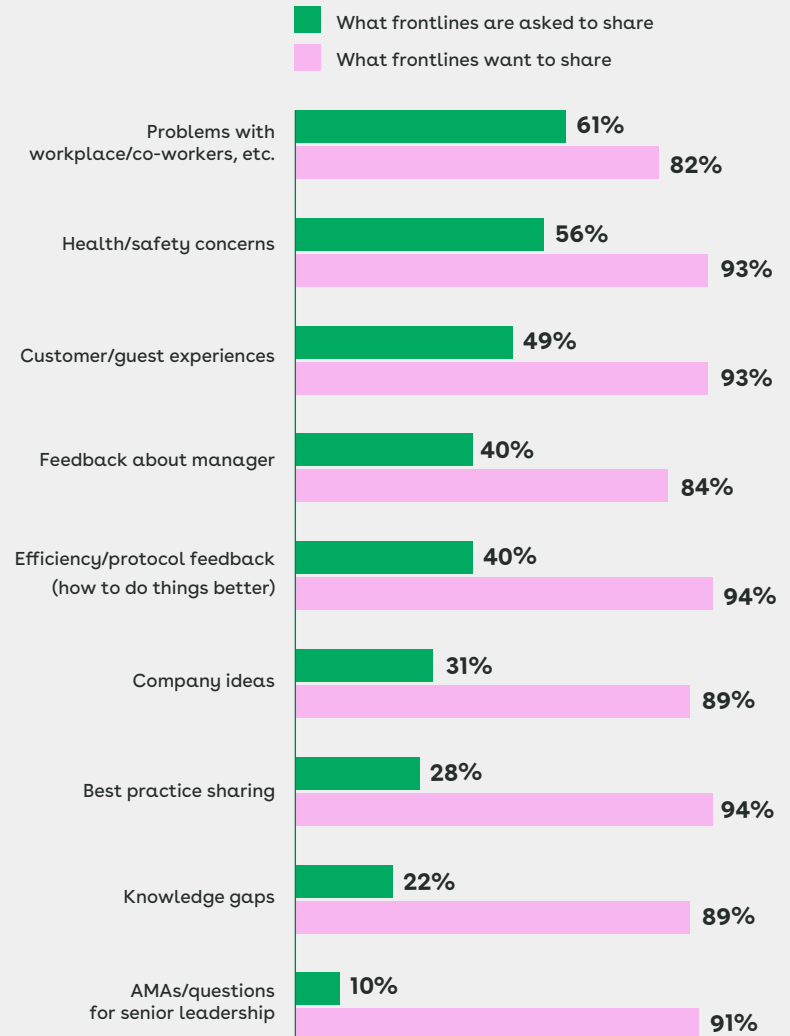
Part of the problem may be confusion about what a feedback program could look like for frontlines. While 79% of corporate leaders and 65% of frontline respondents said that feedback platforms are somewhat or very effective in overcoming challenges and helping workers thrive in their roles, there's a sense of trepidation as to how technology can solve this. When asked if technology can solve the challenge of "no opportunities for upward feedback," 45% of frontline workers said they don't think technology or tools can solve that issue. In other words, they don't see how technology can help them feel heard. And if frontlines don't see the value, organizations are more likely to invest in other areas of employee experience.

So, confidence and participation in feedback programs is dropping – fast. Last year, 59% of frontline workers said they feel heard. This year, that number dropped to 39%.

39%
of frontline workers
feel heard, compared to
to 59% in 2021

Types of feedback frontlines are asked to share versus what they want to share

- 🟩 What frontlines are asked to share
- 🟪 What frontlines want to share

| Category	Asked to share	Want to share
Problems with workplace/co-workers, etc.	61%	82%
Health/safety concerns	56%	93%
Customer/guest experiences	49%	93%
Feedback about manager	40%	84%
Efficiency/protocol feedback (how to do things better)	40%	94%
Company ideas	31%	89%
Best practice sharing	28%	94%
Knowledge gaps	22%	89%
AMAs/questions for senior leadership	10%	91%

"**Managers are burned out trying to act as the go-between, and organizations don't have the tools and processes in place to truly collect the feedback that could drive business outcomes.**"

Furthermore, only 47% of workers feel that their feedback is valued by their organization. Managers are burned out trying to act as the go-between,and organizations don't have the tools and processes in place to truly collect the feedback that could drive business outcomes.

When exploring what a modern approach to frontline feedback could look like, organizations can think of structured, semi-structured, and unstructured feedback channels as they relate to two crucial factors: how easy they are at collecting feedback and the ease at which they help organizations process that feedback into insights. Semi-structured feedback, like a virtual suggestion box, is easily captured, but it's hard to process the broad, non-targeted feedback into actionable insights. Unstructured feedback, like ad-hoc comments from a worker to a manager, are both hard to capture and hard to process. On the other hand, structured feedback, like a targeted pulse survey, is both easy to capture and easy to process.

Types of feedback used in frontline organizations

6.5%
Structured

13%
Semi structured

80.5%
Unstructured
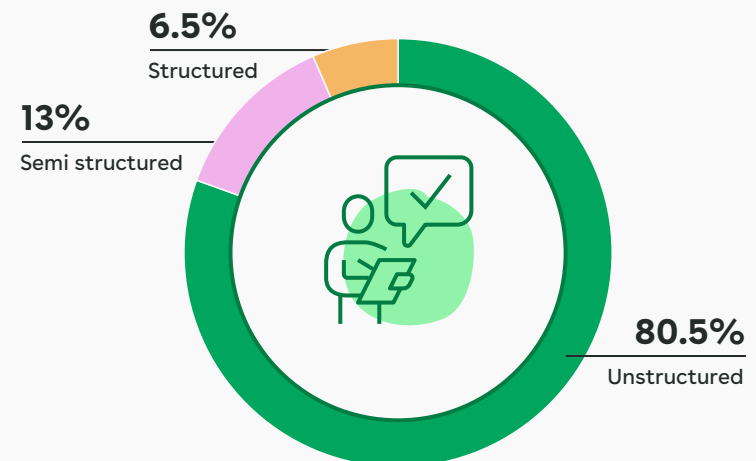
Does that mean organizations should focus entirely on structured feedback? No. Perhaps the best way to frame the usability and function of each of these feedback types is to think of one flowing into the next:

#1

First, **unstructured feedback** can be used to identify possible trending topics or insights on the frontline. This might be via a frontline worker talking to their manager and the filtered, anecdotal feedback making its way up the communication chain. Currently, this type of feedback accounts for all of the top-five feedback channel types frontlines are using today.

#2

Next, **semi-structured feedback** channels could be used to further explore trending topics and identify the specific questions that could be asked of the frontline. This might be via a digital forum on a specific topic ("challenges to improving customer experience"), and workers have the ability to add, upvote, and comment on insights.

#3

Finally, **structured feedback** can be used to quantify feedback at scale. Leveraging the language and insights collected in the less structured feedback channels, organizations can deploy pulse surveys or other structured collection channels in a way that feels relevant and relatable to their frontline.

The takeaway from this approach is that while all feedback types can be valuable to organizations, it's important not to put too much weight on one type. The top five feedback channels used by frontlines are all capturing unstructured feedback, which means valuable insights are being lost or missed. There should be more awareness of the types of feedback organizations could be using and how effectively they can each be used to quickly and easily deliver quality, actionable insights back up to the decision makers.

Technology is valued,
but it's too focused on operationalizing –
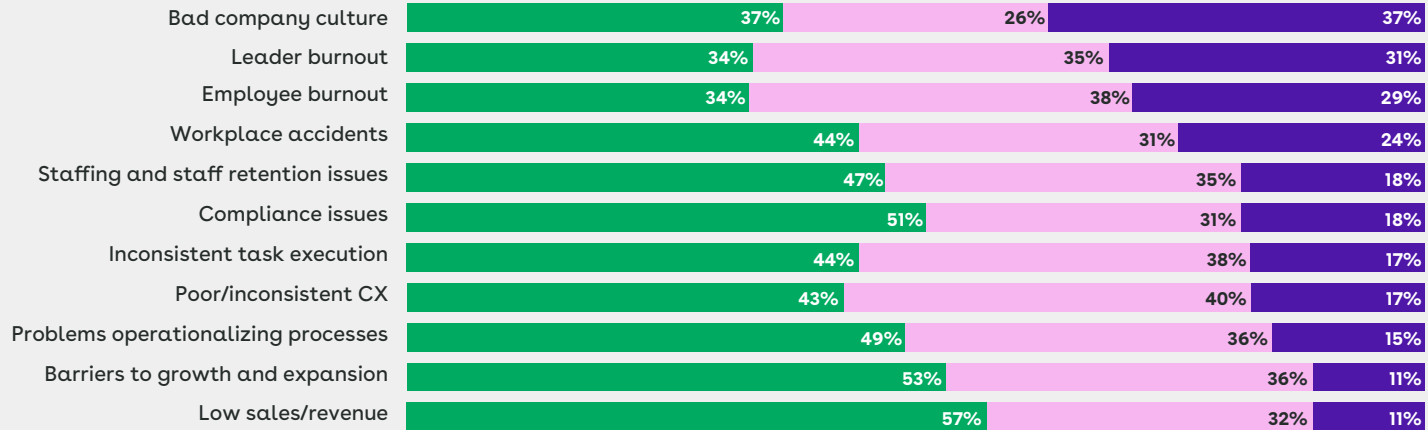## and not focused enough on enabling

There are big conversations right now around a digital transformation in frontline industries: digitizing the customer experience, the guest experience, and, increasingly, the frontline employee experience.
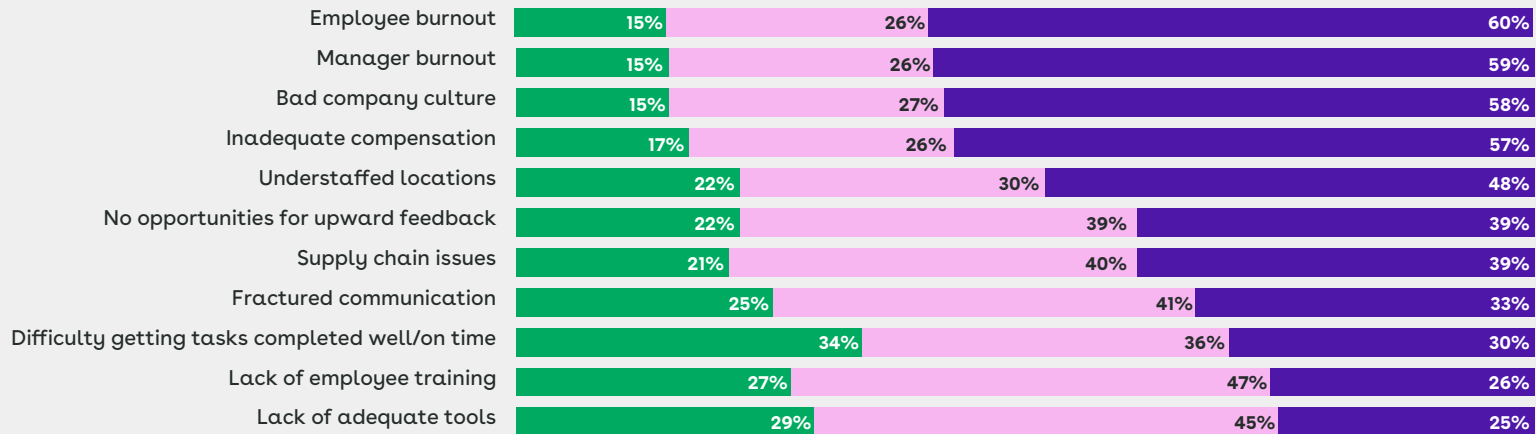
We do see that frontline organizations (especially at the corporate and manager level) believe that technology can solve some of the most pressing issues facing frontlines today. In fact, 84% of corporate leaders, 78% of frontline managers and 69% of workers believe that investing in new technologies for frontline workers improves the overall success of their organization.

Corporate leaders on using technology to solve challenges

Challenge	Currently using	Wants to use	Doesn't think it can solve
Bad company culture	37%	26%	37%
Leader burnout	34%	35%	31%
Employee burnout	34%	38%	29%
Workplace accidents	44%	31%	24%
Staffing and staff retention issues	47%	35%	18%
Compliance issues	51%	31%	18%
Inconsistent task execution	44%	38%	17%
Poor/inconsistent CX	43%	40%	17%
Problems operationalizing processes	49%	36%	15%
Barriers to growth and expansion	53%	36%	11%
Low sales/revenue	57%	32%	11%

Frontline managers and workers on using technology to solve challenges

Challenge	Currently using	Wants to use	Doesn't think it can solve
Employee burnout	15%	26%	60%
Manager burnout	15%	26%	59%
Bad company culture	15%	27%	58%
Inadequate compensation	17%	26%	57%
Understaffed locations	22%	30%	48%
No opportunities for upward feedback	22%	39%	39%
Supply chain issues	21%	40%	39%
Fractured communication	25%	41%	33%
Difficulty getting tasks completed well/on time	34%	36%	30%
Lack of employee training	27%	47%	26%
Lack of adequate tools	29%	45%	25%

■ Currently using ■ Wants to use ■ Doesn't think it can solve

However, a strong disconnect arose when talking about what specific challenges technology can solve for. We see a strong disconnect between corporate, manager, and worker responses – particularly when it comes to the most pressing challenges of burnout, staffing, and task execution. While corporate sentiment is more optimistic on using technology to solve these issues, frontline managers and workers don't share that optimism.
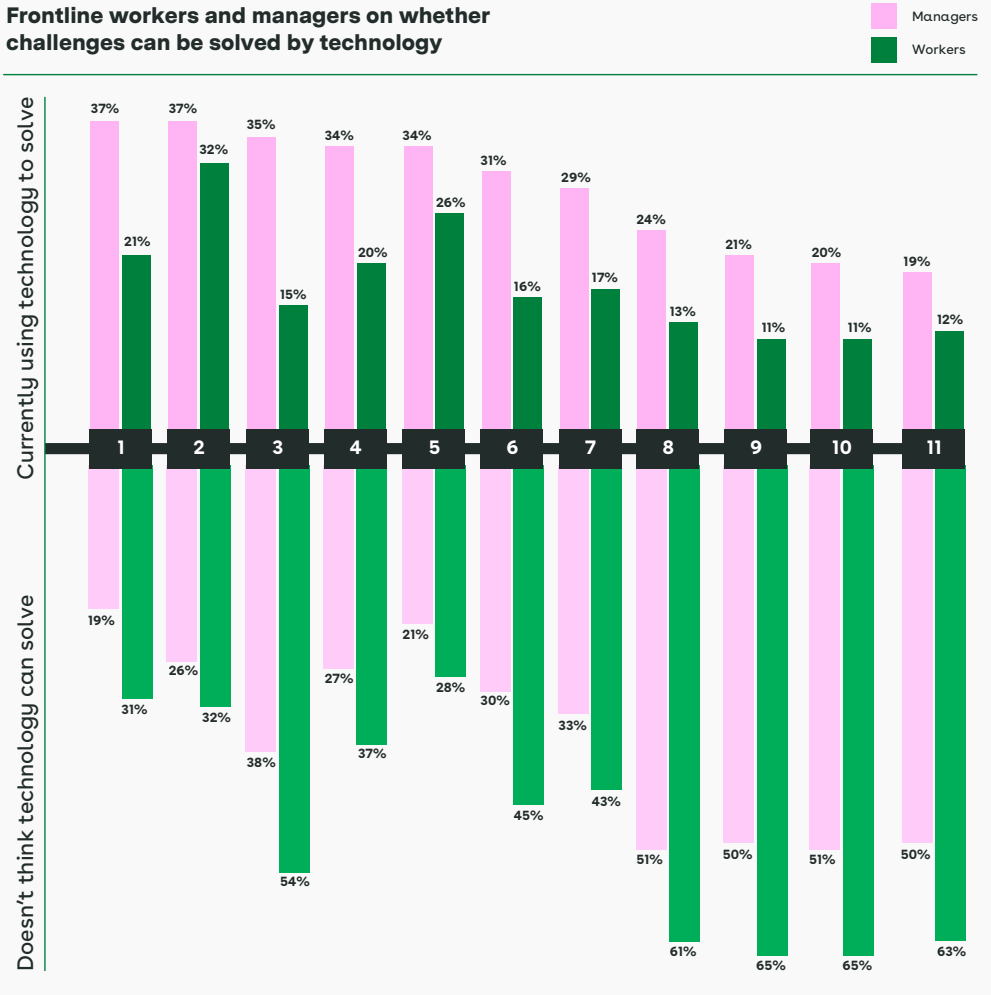
Specifically comparing frontline managers and workers, there was general consensus on what they'd like to use technology-wise, but there was a disconnect over what's currently being used (with managers indicating more wide-spread use of technology to solve challenges) as well as what can't solve the problems facing frontlines (with workers more strongly sharing this sentiment).

One of the strongest disconnects was regarding understaffing. While 35% of managers said they're currently using technology to solve for this, only 15% of workers agreed – and 54% of workers don't think that technology can solve this issue.

60%

of frontline respondents don't believe technology can solve employee burnout, while **only 29% of corporate respondents** agree

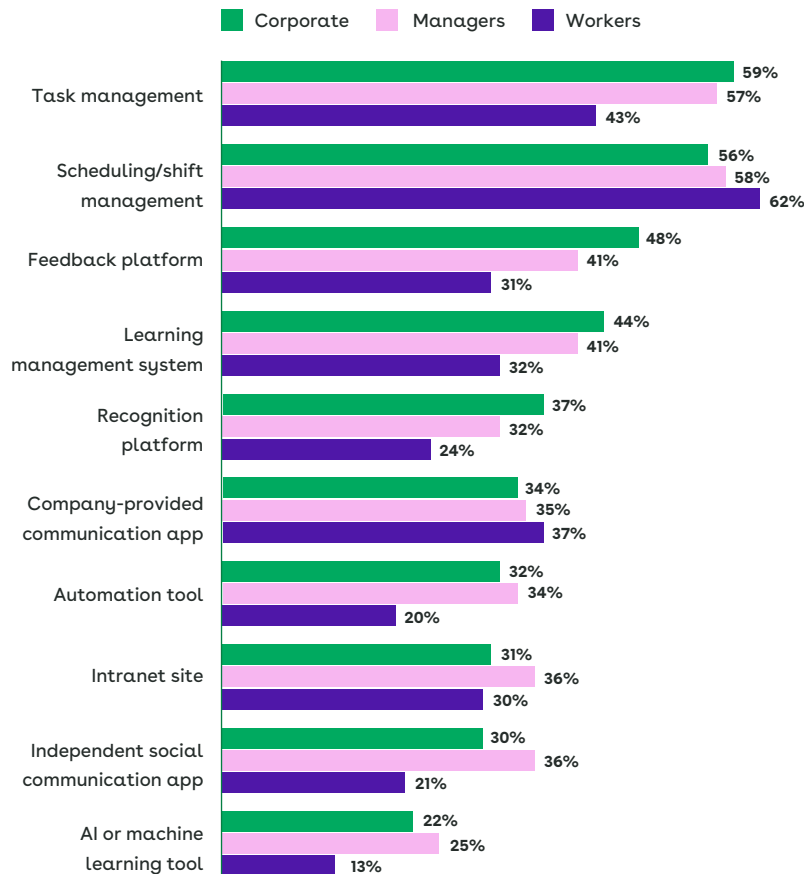**Frontline workers and managers on whether challenges can be solved by technology**

Managers
Workers

Currently using technology to solve

#	Managers	Workers
1	37%	21%
2	37%	32%
3	35%	15%
4	34%	20%
5	34%	26%
6	31%	16%
7	29%	17%
8	24%	13%
9	21%	11%
10	20%	11%
11	19%	12%

Doesn't think technology can solve

#	Managers	Workers
1	19%	31%
2	26%	32%
3	38%	54%
4	27%	37%
5	21%	28%
6	30%	45%
7	33%	43%
8	51%	61%
9	50%	65%
10	51%	65%
11	50%	63%

1. Lack of employee training
2. Difficulty getting tasks completed on time
3. Understaffed locations
4. Fractured communication
5. Lack of adequate tools
6. No opportunities for upward feedback
7. Supply chain issues
8. Inadequate compensation
9. Manager burnout
10. Employee burnout
11. Bad company culture

In terms of specific tools being used, there was a consistent disconnect between what corporate said workers have access to and what workers said they had access to, though the discrepancy got stronger around feedback platforms, recognition, and AI learning.

Corporate versus frontline respondents on what tools and technology frontlines have access to

Legend: ■ Corporate ■ Managers ■ Workers

Task management
- Corporate: 59%
- Managers: 57%
- Workers: 43%

Scheduling/shift management
- Corporate: 56%
- Managers: 58%
- Workers: 62%

Feedback platform
- Corporate: 48%
- Managers: 41%
- Workers: 31%

Learning management system
- Corporate: 44%
- Managers: 41%
- Workers: 32%

Recognition platform
- Corporate: 37%
- Managers: 32%
- Workers: 24%

Company-provided communication app
- Corporate: 34%
- Managers: 35%
- Workers: 37%

Automation tool
- Corporate: 32%
- Managers: 34%
- Workers: 20%

Intranet site
- Corporate: 31%
- Managers: 36%
- Workers: 30%

Independent social communication app
- Corporate: 30%
- Managers: 36%
- Workers: 21%

AI or machine learning tool
- Corporate: 22%
- Managers: 25%
- Workers: 13%

A disconnect also emerged when talking about investing in technology. When asked whether they agreed with the statement, "I believe my organization invests in new technologies for frontline workers," 73% of corporate respondents strongly or somewhat agree, while only 39% of frontline workers feel the same. In fact, managers have reported that low-tech analog solutions, like whiteboards and binders, not only are still being used, but are still being actively adopted and encouraged.

73 %

of corporate leaders feel their organization invests in new technology for frontline workers, while only **39% of frontline workers** agree

Why? There's the question of adoption and adequate training. While 76% of corporate respondents strongly or somewhat agree that their organization provides the necessary time to train frontline workers on the use and implementation of new technologies, only 44% of frontline workers feel the same.

And while workers are interested and willing to adopt technology to solve certain challenges facing their day-to-day work, they don't see the value of technology to solve for the most pressing issues, like burnout and bad culture.

Part of the problem is the word technology itself. It can mean very different things to different people. If you ask a retail worker whether technology can solve for employee burnout, perhaps they'll think of a scanner or self-checkout. If you ask a foodservice worker, maybe they'll think of mobile apps or self-service kiosks.

Can these innovations help solve employee burnout? Can technology pay staff more? Can it help staff who are working multiple jobs to ensure they have enough shifts to get by? To answer this and to better explore what technology can mean for frontlines, let's go back to some of the fundamental needs of frontline workers that need to be addressed in the section below.

Because individual solutions for these challenges exist across a wide field of options, organizations might struggle to make investment decisions without feeling like they need to make significant compromises in other areas. For example, in order to invest in feedback channels, they might have to reduce their investment in recognition.

Organizations want to provide a solution. They want technology to be the solution. But balancing budgets against frontline needs means that organizations need consolidated systems of frontline enablement, not various disparate systems, to avoid compromise and maximize their return on investment.

Compensation

Technology can play a role in achieving the livelihood and stability that frontlines are searching for by improving shift consistency and accelerating upskilling. Both of these benefit not only the worker, but the manager and corporate leaders by fostering the next generation of leaders (more on that later) and optimizing labor.

Community

A critical part of frontline employee community building is peer-to-peer learning and best practice sharing. These are already being leveraged unofficially, and technology can enable, standardize, and scale up these relationship-building initiatives.

Addressing burnout

Technology can be leveraged to foster stronger two-way feedback loops between workers and corporate leaders and also automate and reduce the administrative burden, particularly on frontline managers.

Efficient execution is an indicator of an enabled frontline –
but the drivers to get there are changing

As we explore these critical conversions around what workers need, how communication and feedback is evolving, and the role technology plays in navigating the volatile worlds of frontline organizations, another question emerges: How do organizations know when they're getting it right?
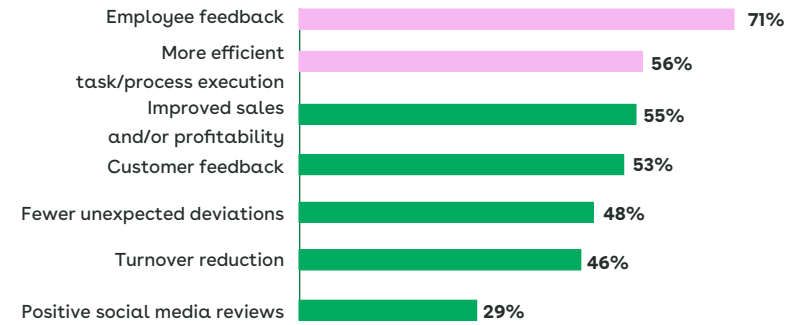
When asked how they know when their staff has what they need to succeed, corporate leaders ranked employee feedback and efficient task execution at the top of the list. This suggests a collision of worlds, so to speak. One world is traditional execution, driven by operational leaders and is process-based, largely improved or optimized at the management or corporate level. Meanwhile, a parallel track of "employee experience" initiatives are usually driven by people and culture leaders (HR, usually) designed to improve engagement, retention, etc. But seeing corporate ranking success indicators like this suggests that, increasingly, these worlds are coming together.

If we review the top factors frontline respondents ranked for contributing to their success and happiness, we again see both operational and employee experience worlds coming together, with adequate training and community both being ranked highly.
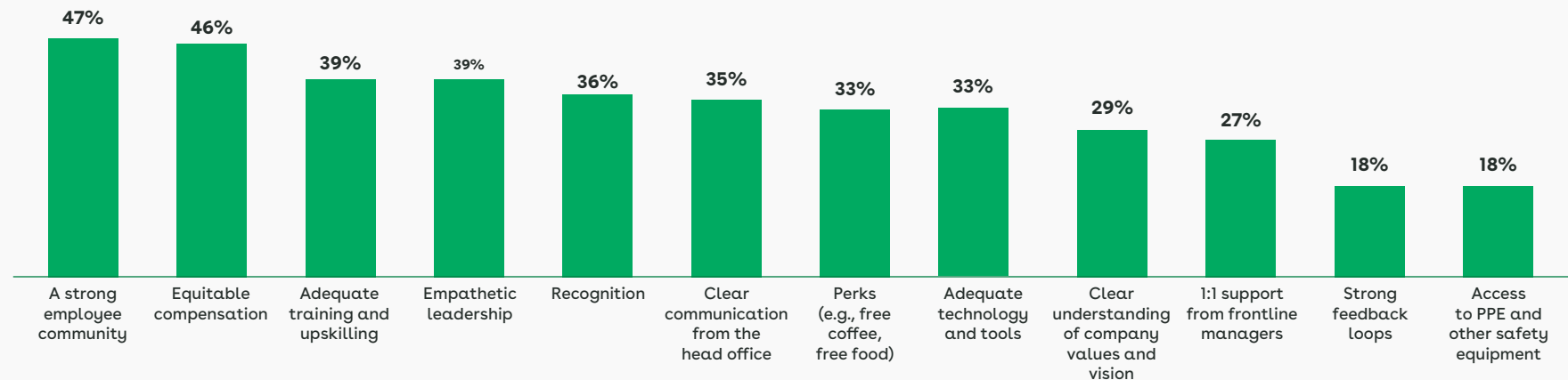
We also continue to see the opportunity to use a new framework when talking about what the frontline needs to execute efficiently, drive sales, and contribute to the overall success of their organization: frontline enablement.

Frontline enablement goes far beyond traditional broad KPIs around engagement and morale. It also extends beyond static revenue and completion metrics. Organizations can benefit from embracing the connection of these two worlds. Task management and execution, for example, needs to empower and engage staff to be an active participant versus being a cog in the wheel.

**Indicators of an enabled frontline according to corporate leaders**

Indicator	Percentage
Employee feedback	71%
More efficient task/process execution	56%
Improved sales and/or profitability	55%
Customer feedback	53%
Fewer unexpected deviations	48%
Turnover reduction	46%
Positive social media reviews	29%

Factors contributing to frontline success and happiness, according to frontline managers and workers

| Factor	Percentage
A strong employee community	47%
Equitable compensation	46%
Adequate training and upskilling	39%
Empathetic leadership	39%
Recognition	36%
Clear communication from the head office	35%
Perks (e.g., free coffee, free food)	33%
Adequate technology and tools	33%
Clear understanding of company values and vision	29%
1:1 support from frontline managers	27%
Strong feedback loops	18%
Access to PPE and other safety equipment	18%

And therein we come back to the importance of technology in this new definition of frontline enablement. Corporate and frontline respondents ranked task management (alongside scheduling platforms) as one of the most effective tools to impact challenges facing frontlines, as well as helping workers thrive in their roles.

On the flip side, frontline respondents were more guarded when asked about actually using technology to impact ineffective task execution, with only 48% of managers and workers having said they currently use task management tools, while 30% said they don't believe technology can help with difficulties getting tasks completed well and on time.

Something is missing here. Perhaps this is how that parallel employee experience track can come into play, with feedback channels and upskilling opportunities used to learn more about what exactly workers want and need, while empowering both managers and workers to come into the task management process and start leveraging it to tackle real operational challenges.

48%
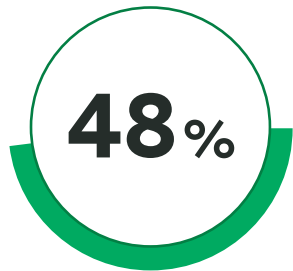
of frontline managers and workers said they currently use task management tools

30%
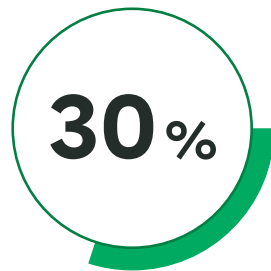
of frontline managers and workers said they don't believe technology can help with difficulties getting tasks completed well and on time
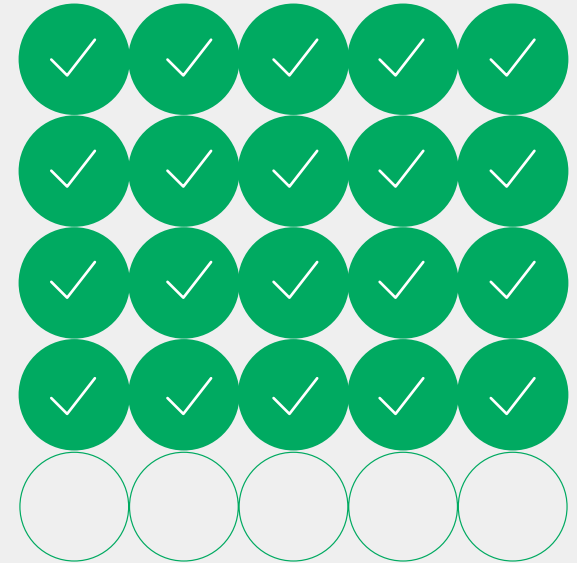
80%

of all respondents believe **task management** can effectively impact frontline challenges and help workers thrive

Training is functional, but dated
– it needs to better align with frontline enablement

How are frontlines getting the information they need to execute their job safely, effectively, and efficiently?

Training programs in frontline organizations still tend toward "old school" systems built for deskbound workforces, if at all. Only 44% of corporate respondents and 35% of frontline respondents said they use a learning management system. The real training is happening informally and unstructured.
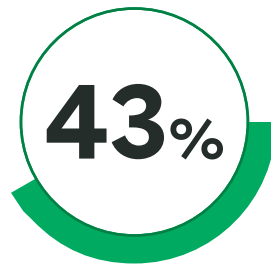
As a result, 43% of frontline managers and 35% of frontline workers said that lack of employee training is impacting their day-to-day work.

"In frontline organizations, where standardization and operational efficiency is top-of-mind, leaning too hard on informal and unstructured training can be a problem."

In frontline organizations, where standardization and operational efficiency is top-of-mind, leaning too hard on informal and unstructured training can be a problem. Not unlike top-down communication and unstructured feedback, this approach leads to inconsistencies that can be detrimental to large-scale workforces, if more agile training methods, like in-the-moment training and knowledge transfers, aren't approached systematically.

In addition to unstructured knowledge transfer, managers are being leveraged to onboard and train staff on a regular basis, which puts added stress on that cohort, especially during heightened periods of turnover and hiring.

43% **of frontline managers** said that lack of employee training is impacting their day-to-day work

"

It is all just knowledge transfer from one employee to another. We are starting a big push for learning and development – we're looking at how to get more digital training, more in-depth training. Right now it's still old school.

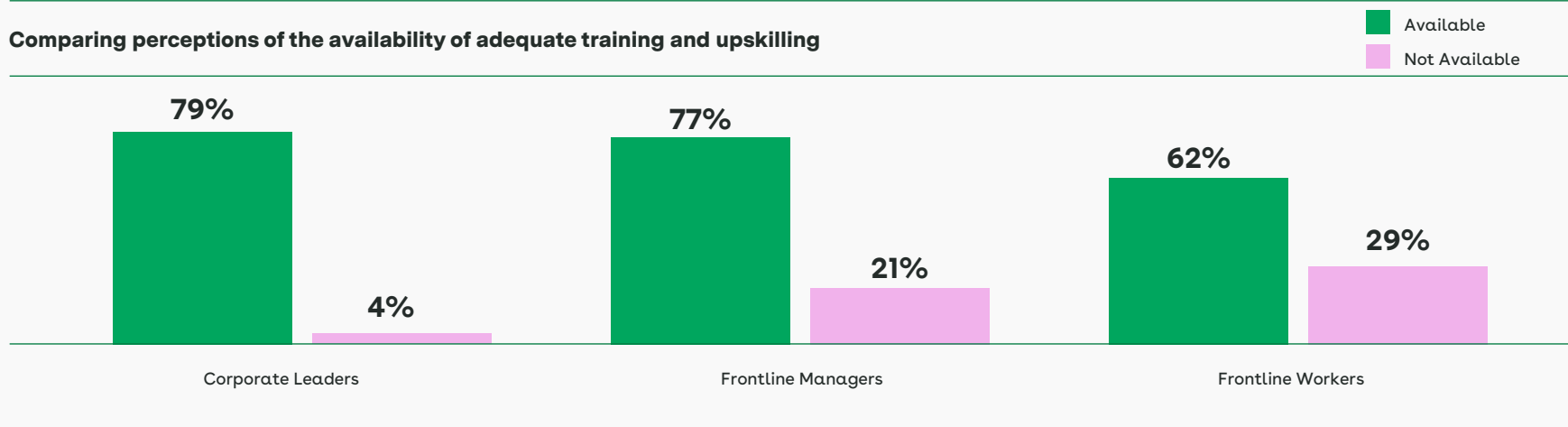- Operations and Logistics Manager, Manufacturing

"

Furthermore, workers don't feel like their organization invests in their growth through upskilling and professional development, which is a problem, because 38% of frontline workers ranked adequate training and upskilling as one of the top drivers of success and happiness at work. 33% of frontline workers somewhat or strongly disagreed with the statement, "I feel like my organization invests in my personal development and growth."

Part of that might be due to a disconnect over the availability of training and upskilling. While 29% of workers said they don't have access to adequate training and upskilling, only 4% of corporate respondents agreed. The suggestion there is that whether or not organizations have robust training programs in place might be beside the point if up to a third of their workforce is unaware of what training opportunities are even available to them. This not only results in inefficiencies and lost opportunities for growth and development, it costs the organization significantly.

38 %
of frontline workers
say adequate training and upskilling is one of the top drivers of success and happiness at work, but **29% of workers don't have access to it**

Comparing perceptions of the availability of adequate training and upskilling

■ Available
■ Not Available

	Corporate Leaders	Frontline Managers	Frontline Workers
Available	79%	77%	62%
Not Available	4%	21%	29%

It might be time to rethink the definition of frontline training. What does it include? It can't just be an annual compliance seminar. It also can't fall entirely to managers to onboard and train their staff. As organizations rethink this concept and how it lives within the frontline enablement ecosystem, the lines between traditional HR-focused L&D, and more operationally focused, on-the-job training, upskilling, knowledge transfer need to blur and create a new, holistic training ecosystem that's systematic and scalable to a workforce of thousands. Investing in this new frontline-focused approach to training can have myriad operational benefits.

Revisiting the frontline approach to training can work with, not against, the volatile nature of these industries. For example, with high turnover at the best of times, reimagining onboarding programs to embrace automated, trigger-based systems can reduce the managerial load and improve consistency across locations and regions.

Upskilling is another potentially untapped opportunity for organizations looking to engage, empower, and enable frontline staff. During periods of heightened turnover, organizations can sometimes see upskilling as a potential negative ROI, with a fear that too much investment in workers will be wasted when they move on. However, upskilling provides two strong benefits, particularly during labor shortages.

> **Corporate trains me and the general manager on a concept. We have to teach the other managers, then the staff.**
>
> - Assistant General Manager,
> Regional foodservice chain

Upskilling protects against manager turnover

With a strong burnout risk, managers are also at a higher risk of turnover and present a higher cost to replace. With a steady stream of upward growth, there's less operational disruption when managers move on or up – or even need to focus their attention on a crisis or time-sensitive task – because there are workers ready to carry some or all of the managerial load.

Upskilling builds loyalty among top performers

Adequate training and upskilling was among the top three contributors to frontline happiness and success. However, only 44% of frontline workers feel optimistic about their career prospects. Providing upskilling opportunities, particularly if paired with the potential for real upward opportunities (including title and compensation), can actually mitigate turnover and build long-term relationships, particularly with hard-to-replace top performers.

A critical part of this new approach to frontline training is having the right technology in place. Luckily, the frontline is open to it. 47% of frontline respondents would like to use technology to help address the lack of employee training – it was ranked the highest among problems that they believe technology can solve for.

> **"A critical part of this new approach to frontline training is having the right technology in place. Luckily, the frontline is open to it."**

This presents an exciting opportunity for frontline organizations to review and revitalize their training programs by recognizing the operational value of embedding them directly into the flow of work, rather than keeping them separate. Technology can help operationalize knowledge transfer and ensure workers are aware of and are capitalizing on the training and upskilling opportunities available to them.

47 %
of frontline respondents want to use technology to improve employee training

Outlook is positive, but guarded
(especially at the frontline level)

What does the future hold? Sentiments around the past year were somewhat aligned: corporate leaders, frontline managers, and frontline workers agree that the past year was a struggle, though burnout and risk of turnover was more prevalent with frontline respondents.
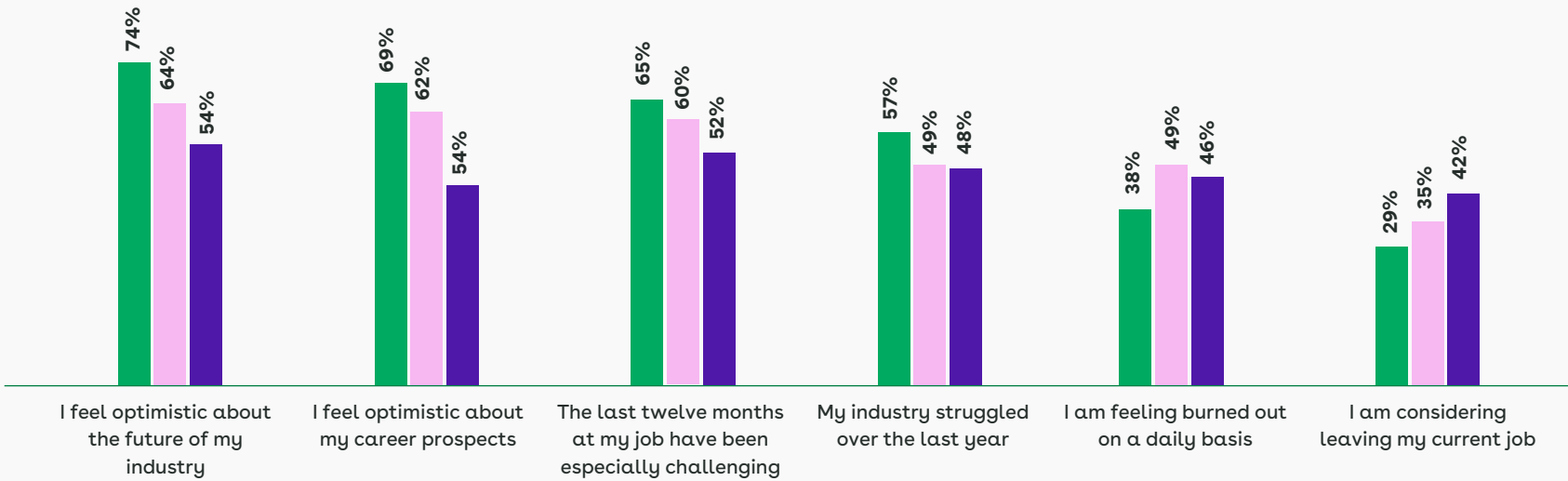
Where we see a stronger discrepancy between sentiments is when we start to explore outlook. Despite the fact that corporate leaders have found the past 12 months particularly challenging, 74% feel optimistic about the future of their industry. However, only 64% of managers and 54% of workers agree – numbers that aren't surprising considering the higher instance of burnout among the frontline.

Perhaps the cause of this discrepancy lies with who is shaping the future. As we've already established, there's a misalignment on the success factors workers need to do their job versus what they have access to, as the chart on the following page illustrates.
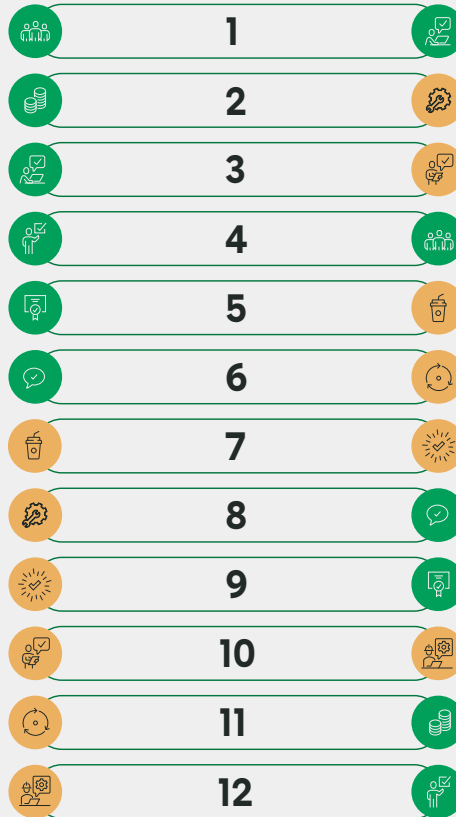
For example, while empathetic leadership was ranked among the top five factors contributing to worker happiness and success, it's ranked at the bottom of the list for what's actually available.

Agreement with outlook statements

Legend: ■ Corporate ■ Managers ■ Workers

Statement	Corporate	Managers	Workers
I feel optimistic about the future of my industry	74%	64%	54%
I feel optimistic about my career prospects	69%	62%	54%
The last twelve months at my job have been especially challenging	65%	60%	52%
My industry struggled over the last year	57%	49%	48%
I am feeling burned out on a daily basis	38%	49%	46%
I am considering leaving my current job	29%	35%	42%

Success factors ranked by frontline need

Success factors ranked by availability (or planned availability)

Success factors ranked by frontline need	Rank	Success factors ranked by availability (or planned availability)
A strong employee community	1	Adequate training and upskilling
Equitable compensation	2	Adequate technology and tools
Adequate training and upskilling	3	1:1 support from frontline managers
Empathetic leadership	4	A strong employee community
Recognition	5	Perks (e.g., free coffee, free food)
Clear communication from head office	6	Strong feedback loops
Perks (e.g., free coffee, free food)	7	Clear understanding of company values and vision
Adequate technology and tools	8	Clear communication from head office
Clear understanding of company values and vision	9	Recognition
1:1 support from frontline managers	10	Access to PPE and other safety equipment
Strong feedback loops	11	Equitable compensation
Access to PPE and other safety equipment	12	Empathetic leadership

When we look at investment, we see more alignment between workers' needs and what corporate leaders plan to give them. Communication and training saw the highest instances of investment increasing annually.

Frontline enablement initiatives that saw an increase in investment

| Initiative	Percentage
Communication	46%
Training	46%
Recognition and rewards	45%
Feedback	42%
Management enablement	42%
Employee engagement	40%
Wellness/HR programs	40%
Other	39%
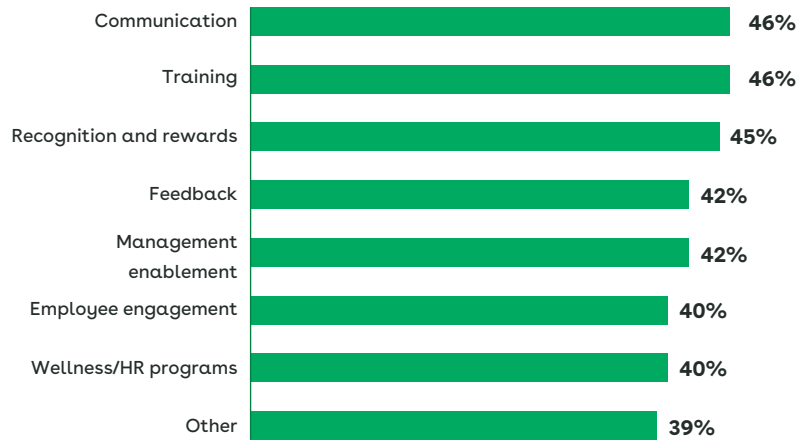
Furthermore, frontline enablement technology is poised to play a pivotal role in these investments, as well as corporate leaders' positive outlook. Though, again, we see workers are more guarded. While 84% of corporate leaders believe that investing in new technologies for frontline workers improves the overall success of their organization, only 69% of workers agree.

84% of corporate leaders believe that investing in new technologies for frontline workers improves the overall success of their organization
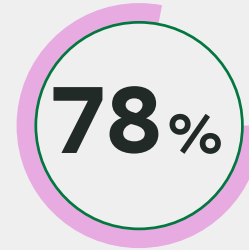
78% of frontline managers believe that investing in new technologies for frontline workers improves the overall success of their organization
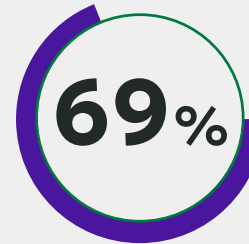
69% of frontline workers believe that investing in new technologies for frontline workers improves the overall success of their organization

Part of the reason for a more guarded sentiment from workers is a current lack of access to this technology. While 73% of corporate leaders feel their company invests in new technologies for frontline workers, only 39% of workers agree. Such a low response could be due to a number of factors, but one may be training. While 76% of corporate respondents believe that they train workers on new technologies, only 44% of workers agree. Furthermore, as we've already explored, workers are unsure of how technology can solve for some of the biggest challenges disrupting their day-to-day work, like understaffing and burnout.

This brings us back to the question, **what is technology?** Here, we go back to the idea of frontline enablement as a new framework for talking about technology for frontline workforces.

> **"Technology can either empower workers or replace them. Workers might not be as optimistic about technology if their definition of the term focuses on automation, AI, and other optimization tools that they see as threats to their livelihood and stability."**

And because technology investment has traditionally been approached from the corporate point of view, focusing on technologies that drive operational improvements without much frontline involvement, it's no surprise that workers would focus on this definition. By shifting the definition over to the concept of frontline enablement, workers may start to see technology as more so working to address the needs of the frontline, as described by them directly, which in turn leads to the improvements the organization is seeking. They then may become more open to adopting and engaging with new technology.

As a part of that process, though, organizations will need to be willing to invest in frontline enablement. In the coming years, we'll see a strong gap emerge between the companies willing to embrace this new approach to frontline work – and those that do not.

73%

of corporate leaders believe their organization invests in new technologies for frontline workers, while only 3**9% of frontline**

Final thoughts

"You can't build an employee experience deserving of exceptional people if you don't understand what they really do every day."

Does the job deserve the worker?

Every employer must ask this question if they hope to attract and retain great workers. This is especially true on the frontline, where employees have long been taken for granted. You can't rely on an unlimited pool of applicants to overcome 150% turnover anymore. People have more opportunities than ever thanks to low unemployment, remote work and the gig economy. If they don't see value in a job, they'll walk away without a second thought, and your customer experience will suffer.

The good news is that deskless workers are telling you exactly what it will take to keep them. They want to be kept up-to-speed with what's going on in their workplace, no matter where or when they work. They want easy access to tools that will help them do their jobs more effectively. Most of all, they want to feel heard and play active roles in helping the business be successful. That's not too much to ask from the people who do the heavy lifting, right?

I hope the insights within this report empower you to craft an employee experience that boosts people's confidence in their ability to do good work, restores a sense of fun and community to the workplace and makes deskless employees proud to represent your brand.

If you're looking for a good place to start, I have a suggestion. Get out from behind the desk, put on the uniform and try to do the job yourself. During my 10 years with The Walt Disney Company, I got back in costume and worked alongside the frontline cast as much as possible. It was a great way to establish credibility, build trust and - most importantly - understand what really happens within the operation. After all, you can't build an employee experience deserving of exceptional people if you don't understand what they really do every day.

JD Dillon
Chief Learning Architect
Axonify

Methodology

Corporate respondents

268 U.S. leaders polled

Title	
Chief Human Officer	20%
Chief Human Resource Officer	7%
Vice President (EVP, SVP, VP)	7%
Senior Director or Director	17%
Senior Manager or Manager	49%

Industry	
Retail	20%
Hospitality	20%
Manufacturing	20%
Foodservice	20%
Facilities Management	20%

Functional area	
Operations	51%
Marketing/communication	5%
HR/recruiting	26%
Customer/guest experience	18%

Age	
<20	1%
20-30	13%
31-40	34%
41-50	26%
51-60	16%
>60	10%

Gender	
Male	49%
Female	50%
Non binary	1%

Frontline respondents

1018 U.S. frontline workers and managers polled
6 frontline managers interviewed

Frontline managers	38%
Frontline workers	62%

Industry	
Retail	20%
Hospitality	20%
Manufacturing	20%
Foodservice	20%
Facilities Management	20%

Age	
<20	3%
20-30	24%
31-40	29%
41-50	21%
51-60	15%
>60	8%

Gender	
Male	37%
Female	62%
Non binary	1%

About Axonify

Axonify is the proven frontline enablement solution that gives employees everything they need to learn, connect and get things done. It starts with brain science and AI to drive knowledge retention through bite-sized microlearning and daily intelligent reinforcement. Embedded two-way communication and feedback ensure your staff is engaged and informed, no matter the scale of your organization, and guided task management shows employees exactly how to put their training to use, every single day. With an industry-leading 83% engagement rate, companies use Axonify to deliver next-level CX, higher sales, improved workplace safety and lower turnover. Axonify enables over 3.5 million frontline workers in 160+ countries, with over 250 customers including Lowe's, Kroger, Walmart and Citizens Bank. Founded in 2011, Axonify is headquartered in Waterloo, ON Canada. For more information, visit axonify.com.

DESKLESS