The frontline leader's guide **to making data-driven decisions**

Nudge

What’s in this guide?

Harness the power of your workforce

What does every organization want? Better business outcomes. That means higher profits, lower turnover, and better productivity and efficiency. And the key to shifting the needle on these crucial metrics is simple: your workforce.

To set up your organization to thrive, you need to harness the power of your workforce. In order to do that, you need to be making data-driven operational decisions based on the needs and demands of your workers.

Wondering where to start? This guide will help you understand what data-driven decisions are and why they're important. We'll identify what data to collect, how to harvest the metrics, and learn what to do with data.

Data alone doesn't tell a story. You need to process and analyze those numbers to find trends and correlations. You need to *find* the story. As Carly Fiorina, former CEO of Hewlett Packard put it, "The goal is to turn data into information and information into insight."

So, let's start turning data into insights.

Why do I need to make data-driven decisions?

What are data-driven decisions?

How engaged is your workforce? How reachable are your teams in uncertain times? How confident are your employees in executing current or future programs and strategies? These aren't questions to answer with your gut. These are questions that can – and should – be answered with data.

Making data-driven decisions is deeply rooted in workforce analytics. That's the process of tracking and analyzing key employee metrics to make fact-based, data-driven decisions to improve performance, engagement, and more. This crucial data can help drive better business outcomes across organizations, everything from sales and CX to operational efficiency and productivity.

Workforce analytics for frontline and deskless teams: a unique challenge

While reviewing workforce analytics is crucial for any company, it becomes especially valuable for deskless organizations with massive employee bases spread across the country – or the world. Collecting and analyzing workforce data allows you to make informed decisions so that you can boost the efficiency and operational agility of your teams, no matter the size.

Why does workforce analytics matter?

Workforce analytics provide organizations with the data and insights to stay agile and responsive, and set up its employees for success. Here are 6 reasons workforce analytics matter for your frontline or deskless organizations:

1. It drives performance and productivity

Workforce analytics allow you to answer the questions that can inform crucial decisions around performance and productivity. How consistent are locations in implementing SOPs and protocols? What locations are consistently lagging in performance, and why? How confident are my teams in executing a program or promotion?

Using data from feedback forums, confidence checks, and other sources to answer these questions provides the insights you need to tweak policies, implement new processes, and identify worrisome locations or regions quickly and easily – in short, better support your frontline at scale.

2. It identifies key knowledge gaps

Knowledge gaps cause money loss and safety issues, particularly among frontline and deskless employees, who are at greater risk due to less robust training, poor employee communication, and inconsistent processes (fun fact: ineffective on-the-job training can cost businesses up to $13.5 million per 1,000 employees per year).

But with knowledge testing quizzes and pulse surveys, companies can get far more strategic with their training. Through execution metrics, surveys, knowledge quizzes, and other data, analytics can identify knowledge gaps, protocol confusion, and other red flags. From there, organizations can triage their training to address the most urgent needs, then fill out the rest of the program as more resources become available.

3. It mitigates disengagement and turnover

Do you know whether or not your employees are engaged? How can you be sure?

Only 16% of companies use technology to measure and track employee progress and engagement. Those who don't rely on a combination of observation, anecdotal evidence, gut feeling, and wishful thinking. This means that you don't know for sure whether or not your frontline and deskless employees – the ones who are in the most stressful positions – are burnt-out or not. And seeing as burnout is responsible for up to half of workforce turnover, this is definitely an area that organizations can't ignore.

Data from mental health surveys, feedback forums, and other communication channels can help you establish your workforce's level of burnout and disengagement. Performance and engagement analytics can further inform the potential business impacts of your situation. With these tools in place, you'll have an early warning system and be able to act accordingly with disengagement strikes.

4. It highlights the trends that lead to better business outcomes

Workforce analytics have the potential to identify trends that could transform your organization.

Here's an example: Data analysis might discover that one branch of a retail franchise has consistently better sales, higher employee engagement scores, and lower turnover. You might then discover that this branch's manager has initiated a few new policies that have completely transformed the location. The organization scales these policies company-wide, and numbers across all branches show significant improvement. You would never have detected that outlier branch without looking at the data.

This may seem like a somewhat extreme example, but it's not that far-fetched. That's the power of best practice sharing, and people analytics is the channel to capture these valuable ideas at scale.

5. It identifies star performers

The secret sauce to driving key business initiatives – and ensuring continued growth and success on the frontline – comes down to your top-performing employees. But here's where it gets tricky. You may have thousands, hundreds of thousands, or (why not?) millions of employees across the country, or even the world. How do you identify your top performers? How do you find the fabled needle in the haystack?

Luckily, there are several proven data points that will allow you to gain a better understanding of both potential and active high performers within your workforce, no matter how large that workforce may be.

6. It improves operational execution

You've spent 6 months planning a product launch. You've executed on the signage, the PR, the inventory. But... are your associates ready? Here's another area where workforce analytics can have a major impact on business outcomes. Using a customized concoction of data from surveys, check-ins, and skill-testing quizzes, you can create a crystal ball that will tell you how successful your launch will go before it even begins.

Harvesting data

What metrics to collect

Here's an in-depth list of the employee metrics that all deskless organizations should track on a regular basis. Depending on the communication and feedback tools you have in place, some of these metrics will be easier to capture than others. We'll get into collecting your data later in the guide, but for now, here's a metrics wish list:

Communication metrics

These metrics will help you gauge how reachable your workforce is and how effective your communication strategies are.

Adoption and reachability

This is a crucial metric for any communication strategy, answering the question, "Who can I reach?" Ideally, the answer would be 100% of your workforce. Depending on the tools you use to communicate with your workforce, your reachability rate can be difficult to nail down. For example, if you communicate by email, you might be able to calculate how many email addresses you have on file, but you don't know how many are recent, let alone how often they're checked. At Nudge, we consider employees reachable if they've used our app recently, and we're confident that your messages will reach them.

Knowledge rates

Generated through knowledge testing and quizzes, knowledge rates can show whether the information that has been shared has been properly retained. This helps ensure that you're identifying knowledge gaps as quickly as possible.

Open/read rates

Again, this will depend on your communication tools and channels, but ideally you have a metric to track how your workforce is consuming content. What percentage of your staff opened your latest announcement? How many read to the end? How many clicked the CTA at the bottom? How often are SOPs accessed and read? These numbers, where available, will help you see whether your content is actually being read by your employees.

Communication engagement

This metric tracks the level of engagement linked to a specific communication campaign, whether it's an employee experience initiative, like a wellness month, or a new customer promotion or product feature. Ideally, you can quantify this data even more with a campaign engagement rate, calculated by the number of employees who interacted with the campaign compared to the number of employees who received it.

Feedback metrics

These metrics will help you monitor your feedback channels and capture great ideas, no matter how big your organization.

Feedback participation metrics

To get an at-a-glance understanding of whether you're fostering a culture of feedback across the organization, look at who is regularly engaging with your feedback channels. Depending on the tools you have in place, you can see who is providing feedback through surveys, forums, or other channels. You may also be able to segment these findings by region or location to identify top-participating groups, as well as those that are quieter.

Feedback sentiment

When you're collecting feedback from hundreds of thousands of employees, it's important to have ways to quantify their sentiments at scale. This might be done through sentiment analysis, crowdsourcing/upvoting ideas, and numbers-focused feedback (like multiple-choice surveys). Capturing ideas in these formats lets you turn qualitative feedback into quantitative insights to make more data-driven decisions.

Performance metrics

These metrics will help you successfully execute on key events, like promos and product launches, by understanding how prepared and knowledgeable your employees are.

Execution metrics

Depending on your industry and organization, you might be leveraging standardized task lists within your internal communication strategy to reiterate standard protocols and processes. Employee performance metrics on frequently assigned tasks and their completion rates will indicate the effectiveness and consistency of your execution.

Campaign success

Closely tied to execution and confidence are metrics related to a specific campaign or key event, like a product launch or a major organizational change. This could be a combination of metrics around reach, knowledge retention, task execution, sales and revenue, and feedback as an indicator of overall campaign success.

Employee confidence

Employees' confidence is directly related to their ability to fulfill their job requirements, whether that be speaking confidently to customers about a product or service or executing on a specific task. Capturing data around employee confidence through a survey, knowledge quiz, or forum is a critical metric needed to predict the success rate of key events, like promos or launches.

Engagement metrics

These metrics will help you keep a pulse on employee morale and identify red flags around disengagement and turnover.

Employee engagement metrics

Employee engagement metrics can be measured in a variety of ways. They can be an aggregate metric based on how your employees engage with your communication and feedback channels, or it can be based on dedicated surveys and pulse checks.

Voluntary turnover rate

Voluntary turnover tracks the number of people who have left your organization on their own volition against the average number of employees overall. A high turnover rate means that an above-average number of employees are quitting. One important note: What constitutes a “high turnover rate” will vary according to a number of factors, such as location, industry, and your own historical benchmarks.

Employee advocacy rates

Employee NPS? Yes, it’s a thing. It’s essentially asking whether your employees would recommend your company as a good place to work and/or whether they would recommend your company’s products or services to a friend. Tracking employee advocacy is a good way of tracking overall employee engagement.An engaged employee is more likely to be an advocate of your brand. Conversely, if your advocacy levels are low, there are likely engagement issues within the organization that may be negatively impacting productivity or customer service.

How to collect your data

Now that you know which metrics you want to be capturing, how do you capture them? There are a few different ways to collect workforce data depending on the communication tools you have in place. Here are a few methods to consider:

Analytics in your existing channels

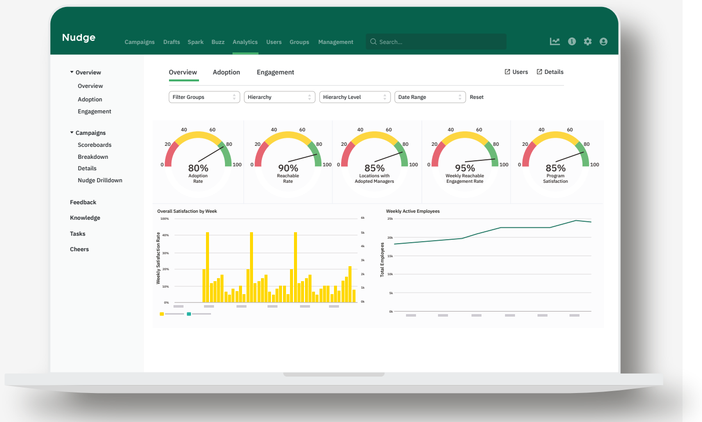
A lot of the metrics we've mentioned above can be captured in your existing communication and feedback channels. Some tools will require more legwork to collect and analyze. If you're using separate email and survey tools, for example, you'll be able to capture some metrics from each. But a purpose-built digital communication platform (like Nudge!) corrals almost all of these metrics into a robust analytics dashboard.

At the end of this guide, you'll find a comparison chart exploring different communication tools and the metrics you can capture with each.

Nudge Analytics

Nudge Analytics gives organizations the insights they need to drive performance and identify red flags before they become a problem. Nudge Analytics includes easy-to-use dashboards that explore everything from campaign execution and feedback to knowledge retention and peer recognition.

Plus, Nudge automatically serves up actionable recommendations to proactively address performance gaps and pivot quickly!



HR & employment data

Data around turnover and employee advocacy are available through your Human Resources team. While this data is less related to performance, the HR metrics you can gather will help you paint a more robust picture regarding engagement and overall morale.

Interviews & focus groups

If you're hoping to capture some of the above insights but don't yet have access to robust analytics through your current communication and feedback channels, you might be able to capture some insights through focus groups. This requires more time and energy to execute on, especially in larger frontline organizations, and you'll want to take care to include a full cross-section of your workers to avoid adding bias to your findings.

Turning data into decisions

What to do next

We've talked about what to collect. We've gone over how to collect it. We've covered the pitfalls to avoid. But... What do you do when you finally have all these numbers? Let's talk about how Nudge turns data into insights, and go through some examples of specific questions you can answer with data.

An easy way to think about workforce insights is separating them into three categories: check-ins, discoveries, and reports. Each of these provide a different range of insights and require a different level of sophistication when it comes to analytics and workforce metrics. The reference sheet at the end of this guide will provide more guidance on capturing actionable insights, but the following pages will provide an overview of the three categories of insights.

Before we get started, one more quick reminder: Most of these metrics require a digital communication platform to truly tell a full story. While you might be able to capture some employee metrics from the more traditional deskbound channels, you won't be able to get to the really exciting in-depth insights without a more robust platform in place (and we can recommend a *great* one).

1. Check-ins

Think of check-ins like a quick gut check on the overall health of your communication program, your feedback program, or your organization as a whole. Consider doing weekly check-ins on your high-level metrics, like adoption rate and weekly active users. This shows you at a very high level how much of your workforce is using your communication and feedback channels, and, in turn, how much of your workforce is informed, empowered, and engaged. If you see your numbers suddenly drop or suddenly skyrocket, you can use "Discoveries" to explore the problem – or replicate what you're doing really well!

2. Discoveries

Discoveries is the approach you can use when you're trying to answer a specific question or solve a mystery, like "Why are my midwest locations seeing an uptick in turnover?" or, "Are all my teams ready for Black Friday?" To answer some of these questions (and unearth those sweet insights as a result), we need to go beyond the specific numbers and find trends in the workforce data. Typically, we would start with a check-in metric, but dive deeper into the single metric.

Questions data can answer

Here are a few examples of insights you can explore with the data you collect. Remember, don't try to answer all of these at once. Pick one or two goals, and go from there.

Who/where are my top performers, and what are they doing?

Sure, you could travel across the country meeting each and every associate to identify your top performers. Or, you could compare knowledge rates, task completion stats, peer and customer recognition, and sales data to identify your superstars without leaving your desk. From there, you can see their engagement in your feedback and idea-sharing channels to identify what they're doing right and scale it across the organization.

Are we ready for our next product launch?
We call this workforce readiness, and it's a delicate cocktail of user confidence, execution, and knowledge. Identifying knowledge gaps and low confidence can uncover issues with your communications or execution documentation, which you can then adjust and re-deploy – before asking this question again.

Is my staff about to quit?
Ah, the million dollar question – literally. A common KPI for trying to predict turnover is engagement. But that's a hard metric to pin down on its own. Instead, you can look at how specific regions or locations are interacting with your communication, recognition, and feedback channels. Look at how regions with the highest turnover rates interact with these channels. Then, take a closer look at those regions for signs of low morale, burnout, operational inefficiencies, or management issues. You should be able to start making connections between some of these issues and turnover, then address these problems at an organizational level.

For example, if you're looking to learn if your teams are ready for Black Friday, you could start by looking at knowledge rates, but dive deeper with questions like:

- *Are all locations scoring a similar knowledge rate?*
- *Does the knowledge rate differ by region?*
- *How does this knowledge rate compare to our Black Friday knowledge rate last year?*
- *Is there a correlation between the communications we've shared and knowledge rate?*

To get the most out of your discoveries, be sure to keep things focused around a goal. Workforce insights will provide you many data points to understand how your organization is performing.

That said, it's critical to select the correct metric that is aligned with the objective you are looking to solve.

3. Reports

Here's where we start to get into larger data sets that provide a more holistic look at the health of an organization and optimize drivers of core business outcomes. Reports are typically dynamic, looking at metrics over a period of time (and often pull in other data from a number of sources). For example, if you wanted to create an "Employee Engagement" report, you might be pulling numbers related to everything from adoption to campaign execution and comparing it against HR data, operational insights, and sales numbers. Segmentable dashboards comparing subsets of an organization can be useful in these larger reports to see where learnings arise.

Tips on making data-driven decisions

Here are a few more tips finding actionable insights in a sea of data:

Look for patterns: Does one region always score lower on knowledge campaigns? This could signal something larger at play.

Keep focused: Folks can often try to improve many metrics at once, but this can lead to information overload.

Listen to your frontline: Combine the quantitative aspects of your communication strategy with qualitative data to build a holistic approach to communication.

Don't be afraid of scary numbers: A not-so-nice metric always provides the foundation for improvement and growth.

Correlate, correlate, correlate: Combining workforce data with any other company data allows for greater analysis and insight into the business drivers at that time.

Use your own benchmarks: It can be tricky comparing your metrics against industry norms. When looking for red flags, nothing beats your own company benchmarks.

Common mistakes to avoid

The 5 most common data mistakes organizations make

When it comes to harvesting, interpreting, and actioning on this crucial data, there are a lot of opportunities for organizations to go astray. Here are 5 of the most common mistakes organizations make when tracking workforce analytics

1. Not setting goals (or setting too many!)

Without goals in place, you're just collecting data for data's sake, not turning those metrics into insights. An easy way to think about metrics goals is to focus on the questions you want answered. Are you looking to identify your CX success drivers? Maybe you're trying to predict how successful your future campaigns will be? Once you have goals to focus on, you can fine-tune the data you're collecting.

2. Not seeing the bigger picture

Data doesn't exist in a vacuum. Specific metrics can seem super important (and sometimes a little scary! We're looking at you, voluntary turnover rate), but by digging deeper, we see it takes multiple layers for a story to unfold. Looking at your data as larger workforce insights ensures you're staying focused on driving better business outcomes from your data, not just panicking over individual numbers.

3. Not having the right tools in your toolbox

A common mistake that organizations make is trying to capture workforce insights without the right tools in place. If your communication and feedback channels and other tools aren't fully capturing your metrics, you're at risk of telling an incomplete story. Or, worse, you'll start to fall back on anecdotal evidence or gut instincts to fill in the blanks, which can be just as bad.

4. Not capturing everyone in your workforce

You might have certain workers, locations, or even full regions that are invisible when it comes to collecting data. They might not have company emails, for example, or they might not engage in your channels because of language barriers or even time zone changes. This is a crucial mistake to avoid because you need a complete data set to give an accurate picture of your workforce and your organization as a whole.

5. Not actioning on your data insights

Value cannot be derived from insights unless they are put into action. A common mistake that organizations make is sitting on their findings, unsure of what to do next. If you've collected data but are uncertain about what to do next, consider reaching out to professionals for a consultation (psst...if you're a Nudge user, our award-winning customer success team provides ongoing support and analysis of your data).

How Nudge makes data-driven decisions easy

Nudge: everything you need to make data-driven workforce decisions

Top-performing organizations use workforce insights to ensure that their frontline has the support and information they need to thrive. That's where Nudge comes in. By analyzing the performance of their communication strategies, Nudge gives organizations the insights they need to drive employee engagement, productivity, and performance.

Weekly insights alert you to red flags, with clear recommendations for next steps

Analytics dashboards provide in-depth looks at how your workforce is doing

Readiness indicators analyze how knowledgeable and confident teams are

Reports can be pulled quickly and easily to share with stakeholders or other teams

Manager Dashboards allow managers to access analytics for their locations or teams

Loved by our customers - and their employees

"I've seen firsthand the power of getting communication in an easy and instant way with our frontline associates in a way that's meaningful for them."

- Rachel Huckle, Staples Canada

"Great reads on everything that is going on within the company. Very helpful and to-the-point easy access. I find that very refreshing."

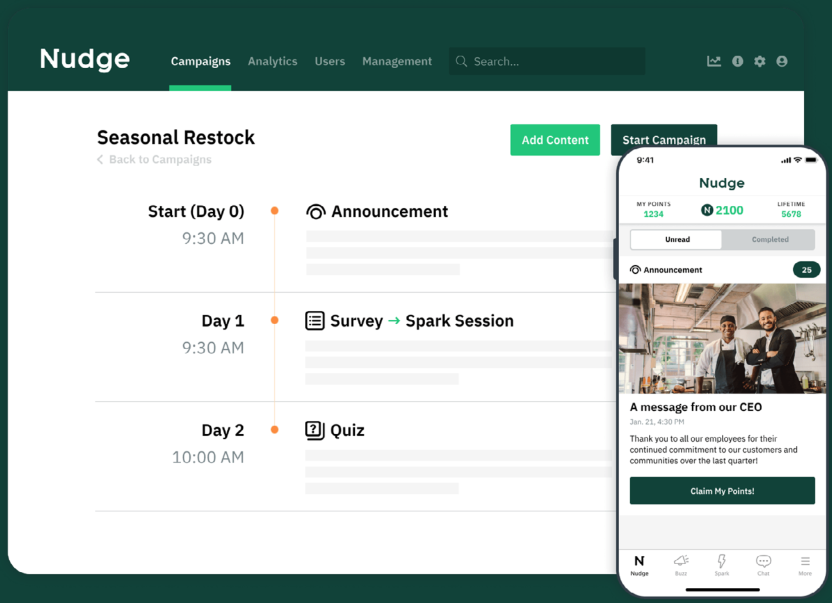
- Patricia C., User

Apple Store

4.6 Stars
+6.3k Reviews

Google Play

4.6 Stars
+8.3k Reviews



Get the top-rated frontline enablement solution every workforce *needs*.

*Want to see how Nudge can help your organization? **Click here** to get in touch.*

Printables and templates

Use these worksheets and charts to make data-driven workforce decisions.

COMPARISON CHART

Communication tools analytics

Here's a chart of the most common communication tools and the metrics each one collects

	Email	Intranet	Newsletter	Surveys	LMS	Human capital management software	Digital communication platform
Adoption and reachability		X			X		X
Open/read rates	X	X	X	X	X		X
Knowledge rates				X	X		X*
Communication engagement		X			X		X
Feedback participation metrics		X		X			X
Feedback sentiment				X			X*
Execution metrics							X*
Campaign success							X*
Employee confidence				X	X		X*
Employee engagement metrics				X			X
Voluntary turnover rate						X	
Employee advocacy rates				X			X*

*May not be available on all digital communication platforms

REFERENCE SHEET

Making data-driven decisions

Use this reference sheet to capture actionable insights about your workforce and organization as a whole – and use the data to make successful business decisions.

INSIGHT TYPE #1

Check-ins

Frequency: Weekly

Purpose: Quick gut check on the overall health of your communication program, feedback program, or organization as a whole

Metrics to collect: High-level metrics that give you a quick sense of program health. For example:

- Adoption rate
- Weekly active users
- Platform engagement

What you're looking for: Major drops or rises in numbers

What happens next: If you see a major drop or rise in your metrics, use "Discoveries" to identify and address the problem, or replicate what you're doing well.

INSIGHT TYPE #2

Discoveries

Frequency: As needed

Purpose: Answer a specific question or solve a data mystery that emerges in your weekly check-in

Metrics to collect: Dive deeper into the check-in metric or question you're interested in. For example:

- Do you see the same metric across all your locations and regions?
- How does this metric compare to last month or last year?
- Are you seeing a similar lift or drop in other metrics that might be correlated?

What you're looking for: Correlations in workforce data

What happens next: These correlations can help you answer questions or concerns. For example, if you're hoping to learn whether your staff is about to quit, you might look at how regions or locations with the highest turnover rates are interacting with your communication, recognition, and feedback channels. You can also look at those regions for signs of low morale, burnout, operational inefficiencies, or management issues. You should be able to start making connections between some of these issues and turnover – and address the problems at an organizational level.

INSIGHT TYPE #3:

Reports

Frequency: Annually/as needed

Purpose: Develop a more holistic look at the health of an organization and optimize drivers of core business outcomes

Metrics to collect: Robust metrics pulled over a longer period of time that often include data from a range of sources. For example:

- Communication platform analytics
- HR data
- Operational insights
- Sales data

What you're looking for: Segmentable dashboards comparing subsets of the organization

What happens next: Analysts can use these reports to dive deeper into an organization's overall health or long-term outcomes. They can compare subsets of an organization to identify key learnings or concerns. identify and address the problem, or replicate what you're doing well.