

A man in a light-colored shirt stands at the head of a conference table, pointing towards a large digital screen. The screen displays a financial dashboard with various charts and tables, including a prominent 'Current Ratio' of 2.3. Several people are seated around the table, looking towards the presenter. The room has large windows with blinds in the background.

HR INSIGHTS UNVEILED  
ELEVATING THE  
EMPLOYEE EXPERIENCE

**Lutz**

ACCOUNTING · FINANCIAL · TECH · M&A · TALENT

# THE PRESENTERS



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# ▲ AGENDA

- ▶ **Industry Challenges**
- ▶ **Culture**
- ▶ **The Employee Experience**
- ▶ **Stages of the Employee Experience**
- ▶ **Next Steps**
- ▶ **Q&A**



# WORKFORCE CHALLENGES

- ▶ **Workforce Shortage**
- ▶ **Recruitment**
- ▶ **Retention**
- ▶ **Employee Engagement**
- ▶ **Training & Development**



# CULTURE

- ▶ **The personality of an organization**
  - A shared set of workplace values, attitudes, standards, purposes, processes, beliefs and behaviors
- ▶ **Affects day-to-day interactions, relationships, between employees and managers and the physical environment**
- ▶ **Significantly impacts the employee experience**
- ▶ **Essential ingredients**
  - Trust, Communication, Clarity, Purpose



# HAPPY EMPLOYEES = HAPPY CUSTOMERS

What employees experience, customers will experience.

The best marketing is happy, engaged employees.

Tom Peters

There are only three measurements that tell you nearly everything you need to know about your organization's overall performance: employee engagement, customer satisfaction, and cash flow..It goes without saying that no company, small or large, can win over the long run without energized employees who believe in the mission and understand how to achieve it.

Jack Welch, former CEO and chairman of General Electric

Businesses often forget about the culture, and ultimately, they suffer from it because you can't deliver good service from unhappy employees.

Tony Hsieh, CEO of Zappos

# ▲ THE EMPLOYEE EXPERIENCE

- ▶ **The journey an employee takes with your organization**
- ▶ **Directly affects employee engagement, retention, performance, development and more**
- ▶ **How do your employees experience your workplace?**

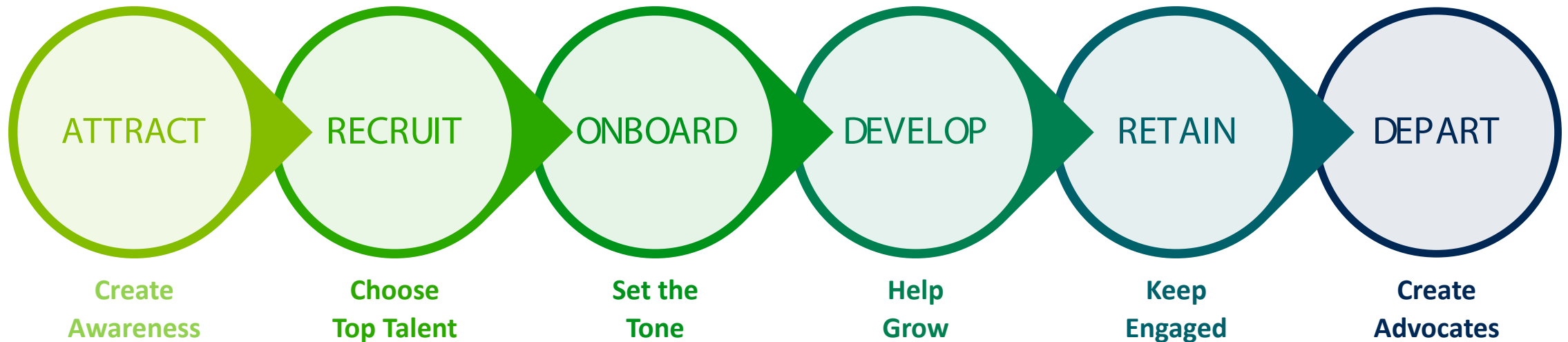


Every interaction, every **moment** that employees have with your brand influences whether they'll stay with your organization. From social media posts to hallway conversations, the **experiences** employees have with your organization shape how they **feel** about it. In fact, your employee experience starts before people even apply: Every day, potential hires quietly grade your workplace, asking themselves whether it would deliver **the moments that matter most to them.**



An employee journey can make all the difference in **retaining top talent**, boosting **employee engagement**, and improving productivity. In fact, studies have shown that companies with a strong focus on employee experience outperform their competitors by **122%**.

# EMPLOYEE EXPERIENCE STAGES



# 1. ATTRACT

▶ **What aspects of our culture do we highlight to attract talent?**

▶ **CONSIDERATIONS**

- Brand Identity
- Vision and Values
- Social Media Presence
- Referral Programs



## 2. RECRUIT

▶ Does our process ensure we are hiring the best talent?

▶ **CONSIDERATIONS**

- Emphasis on Culture
- Recruitment Strategy
- Length and Ease of Recruitment Process
- Candidate Experience



# 3. ONBOARD

▶ How do you set the tone and affirm your new employee's choice to join your organization?

▶ CONSIDER THE 5 C'S:

- Compliance
- Clarification
- Culture
- Connection
- Check-back





# 4. DEVELOP

▶ **Do our employees see a future with us?**

▶ **CONSIDERATIONS**

- Skill Set Development
- Manager Development
- Feedback and Coaching
- Focus on Strengths



# 5. RETAIN

▶ **How do we establish continued purpose and leverage employee strengths?**

▶ **CONSIDERATIONS**

- Workplace Flexibility
- Employee Wellness
- Recognition
- Compensation & Benefits



# 6. DEPART

## ▶ How do we create advocates?

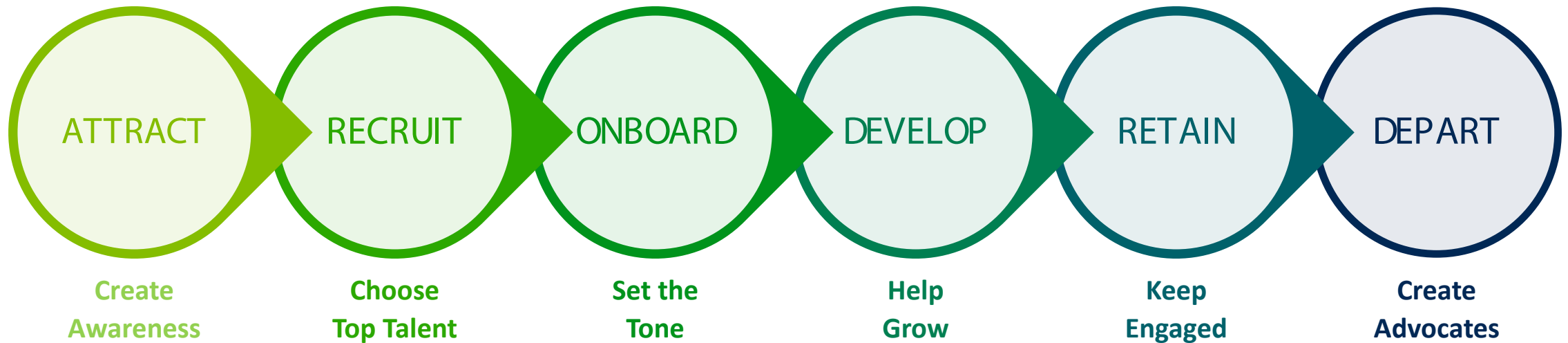
## ▶ CONSIDERATIONS

- Crossroads Conversations
- Termination Process
- Exit interviews/Feedback
- Support





# EMPLOYEE EXPERIENCE STAGES



# ▲ NEXT STEPS

## EMPLOYEE EXPERIENCE MANAGEMENT

- ▶ Identify the most important aspects of your culture
- ▶ Map your employee experience at each stage
- ▶ Gather feedback from employees and candidates
- ▶ Identify opportunities and make any necessary modifications
- ▶ Intentionally implement moments that matter



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# QUESTIONS?

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**Lutz**

MIND WHAT MATTERS

# THE LUTZ NETWORK

## ACCOUNTING

- ▲ **Audit & Assurance**
  - Audit, Review, & Compilations
  - Employee Benefit Plan Audits
- ▲ **Client Accounting Services**
  - Outsourced Accounting
  - Accounting Procedures Assessment
  - General Accounting Support
- ▲ **Tax**
  - Federal Business Tax
  - Individual Tax
  - State & Local Tax
  - Estate & Succession Planning

## CONSULTING

- ▲ **Business Valuation**
- ▲ **Healthcare Consulting**
- ▲ **Internal Control Assessment**
- ▲ **Litigation Support & Forensic Services**
- ▲ **Risk Assessment Services**

## FINANCIAL

- ▲ **Financial Planning**
- ▲ **Investment Advisory**
- ▲ **Retirement Plan Services**
  - Pooled Employer 401(k) Plan

Investment advisory services are offered through Lutz Financial Services, LLC.

## M&A

- ▲ **Sell-side Representation**
- ▲ **Transaction Advisory**
  - Due Diligence
  - Quality of Earnings
- ▲ **Business Transition & Exit Planning**

## TALENT

- ▲ **Search & Staffing**
- ▲ **Outsourced HR**
- ▲ **HR Consulting**

## TECH

- ▲ **Data Analytics**
- ▲ **Outsourced IT**
- ▲ **Technology Strategy Consulting**
- ▲ **Software Consulting & Implementation**

