

The People Analytics Playbook for Product, Change, & Stakeholder Engagement

St. Louis
People Analytics Meetup

11.13.24



0 - Introduction

This playbook captures insights from a strategy lab facilitated at the St. Louis People Analytics Meetup on November 13, 2024, at the Edward Jones HQ. The lab featured three breakout sessions – each focused on product ownership, change management, or stakeholder engagement – exploring challenges, lessons learned, and strategies specific to the people analytics field. It is the hope of the St. Louis People Analytics community that this playbook will be a valuable contribution to our discipline and have utility to practitioners here, near and far.

1 - Product Management

The objective of product management in people analytics is to establish a structured approach to discovery and requirements gathering, ensure disciplined releases of data and analytics products, actively monitor utilization patterns, capture user feedback, and implement a framework for prioritizing enhancements to continuously improve and evolve solutions. This section outlines a set of principles, considerations, and best practices for successful product development and adoption in people analytics.

Product Development

- 1. Baseline Requirements & Objectives**
 - Define baseline requirements early on for foundational needs.
 - Establish a clear **North Star**: articulate what the product aims to accomplish in terms of both business outcomes and user value.
- 2. User Experience (UX) Considerations**
 - Prioritize the best user experience, such as optimizing interaction flows and minimizing unnecessary clicks.
 - Recognize that standard intake forms may not capture the full context or depth needed to develop what stakeholders truly need.
- 3. Role of Product Ownership**
 - Ideally, have an **Experience Owner** or dedicated **Product Owner** to manage the product's lifecycle and its evolution over time.
 - Acknowledge that in resource-constrained settings, having a fully dedicated Product Owner may not be feasible.
- 4. Seasonal and Specialized Products**
 - Seasonal solutions (e.g., performance management, compensation cycles) require a unique product model, differing in development and adoption strategies compared to evergreen products.

Product Adoption

1. Measuring Impact and Outcomes

- Focus on whether the product leads to **better decision-making and outcomes**.
- For attribution, assess the product's contributions to tangible outcomes (e.g., enhanced gross margin through improved workforce planning).

2. Driving Adoption through HRBPs and Business Alignment

- Use **HR Business Partners (HRBPs)** as key facilitators by encouraging them to integrate the product in meetings with business leaders, showing direct alignment to business goals.
- Frame adoption as progress monitoring toward business objectives to reinforce relevance.

3. Contextual and Temporal Product Needs

- Recognize that certain **annual programs** have inherent adoption due to their periodic need.
- Avoid maintaining legacy solutions if they're no longer in use, signaling that they have fulfilled their purpose.

4. Adoption Measurement: Quantitative and Qualitative

- Monitor both quantitative (utilization metrics) and qualitative adoption (how stakeholders use the product and outcomes achieved).
- Differentiate between **expected vs. observed behavior** to assess true engagement levels and product value.

5. Adoption Challenges and Variability

- Identify gaps in usage across various user groups to determine areas where additional support may increase utilization.
- Note that adoption rates often depend on business leader involvement, with technically engaged users acting as champions to drive broader adoption.

6. Building Awareness and Support via HRBPs

- Empower HRBPs to support and enable business leaders by showcasing solutions in relevant business contexts.
- Increase visibility by joining meetings with key user groups (e.g., monthly HRBP syncs) to share current projects and upcoming product features.

2 - Change Management

To apply change management principles effectively within people analytics, shifts must be meaningful, accessible, and beneficial to stakeholders. This section covers how each principle translates within this context.

ADKAR Model in People Analytics

1. **Awareness:** Begin by creating an awareness of the *why* behind the shift. Highlight the need for change, such as improving retention insights or fostering data-driven leadership decisions. Demonstrate the benefits clearly, like enhanced decision-making or a more inclusive culture, to create urgency and relevance.
2. **Desire:** To build desire, articulate how the change makes things easier or better for the employees and managers. For example, if a new people analytics dashboard is introduced, demonstrate how it enables managers to quickly identify team engagement trends and address concerns before they escalate. Emphasize how this tool streamlines their ability to make data-informed decisions and foster a supportive team culture, tying the benefits directly to managers' goals for team success and retention.
3. **Knowledge:** Equip teams with knowledge of new tools, metrics, and reports. Provide training that includes both technical aspects and practical application, such as interpreting dashboard insights for more actionable conversations. This knowledge transfer should be accessible and incremental to avoid overwhelm.
4. **Ability:** Develop the skills employees need to adopt and sustain these changes, from navigating new data visualization tools to understanding key performance indicators. Reinforce learning through hands-on support, especially for managers who may be responsible for translating analytics into team performance insights.
5. **Reinforcement:** Reinforce the value of the change by tracking and sharing impact metrics, showing how analytics insights have led to tangible improvements, such as better manager scorecards or reduced voluntary turnover. Regular feedback loops and success stories can help sustain engagement and commitment to the change.

Importance of Redundancy

Role redundancy is crucial to prevent bottlenecks and knowledge silos. Cross-training team members ensures continuity and fosters a collaborative environment where insights and critical functions are shared among the team. Regularly scheduled knowledge-sharing sessions and documentation processes can facilitate this redundancy, reducing reliance on single individuals and promoting adaptability.

Embedding Key Metrics in Manager Scorecards

For meaningful accountability, integrate specific metrics into manager scorecards. Metrics like employee movement (promotions, lateral moves) underscore the link between manager practices and workforce

outcomes. Tying these metrics to manager performance promotes accountability and encourages a proactive approach to workforce management.

Addressing Change Resistance (Mauer's Model)

Resistance to change often arises from cognitive, emotional, or trust-based concerns:

- **Cognitive Resistance – “I don’t understand.”:** Address lack of understanding by simplifying the change and providing clear explanations on how it can benefit teams. Use practical examples to clarify metrics and trends.
- **Emotional Resistance – “I don’t like it.”:** To overcome emotional barriers, connect the purpose of the change to employee values and the company’s mission. Emphasize user-friendly tools and design experiences to reduce friction and increase buy-in.
- **Trust Resistance – “I don’t like you.”:** Build trust by involving respected team members or early adopters in championing change initiatives. Peer advocacy can be a powerful motivator and help break down resistance among skeptical groups.

Lewin’s Change Model: Unfreezing, Movement, Refreezing

1. **Unfreezing:** Challenge the “way things have always been done” to identify and question outdated practices. Acknowledge the long-standing habits and communicate the positive impact of new data-driven approaches, gently encouraging teams to embrace a new mindset.
2. **Movement:** As changes are implemented, maintain flexibility to adjust based on feedback. Encourage iterative learning, where employees and managers can trial new metrics or reports and provide feedback to refine the process.
3. **Refreezing:** Once new behaviors are established, reinforce them by embedding analytics insights into routine decision-making processes. Regularly celebrate successes and share improvements with the organization, showcasing the change as the new standard.

Ensuring User-Friendliness and Business Partner Support

To maximize adoption, ensure that the analytics tools and insights are intuitive, aligning with the daily needs of business partners. For example, if a new dashboard helps track turnover, design it with simple navigation and easy-to-understand visuals. Also, provide tailored training sessions that focus on practical, real-world applications, which make analytics accessible and appealing to employees at every level.

3 - Stakeholder Engagement

Stakeholder engagement in people analytics aims to bridge the gap between data-driven insights and the needs of organizational leaders by fostering trust, clarity, and alignment. This section outlines common stakeholder engagement challenges facing people analytics practitioners as well as proven strategies for overcoming them.

Common Stakeholder Engagement Challenges

1. **Lack of Data-Oriented Mindset:** Many managers are hesitant to engage with data due to a historical lack of familiarity or comfort with data-driven thinking.
2. **Trust and Connectivity Issues:** Building trust and fostering connections are often overlooked, especially by data-focused groups, hindering buy-in and adoption.
3. **Stakeholder Misalignment:** Stakeholders often express demand ("hunger") for insights but lack clarity on their underlying needs or the possibilities of what data can offer.
4. **Vague Leadership Requests:** Leaders sometimes lack direction, leading to inefficient "bring me a rock" exercises. This requires helping stakeholders refine their questions into actionable and realistic objectives.

Effective Strategies

1. **Executive Champions:** Having a senior advocate, such as an HR leader, can significantly drive engagement and credibility for the analytics function.
2. **Stakeholder Journey:** Guiding stakeholders through the maturity curve of adopting a data-driven mindset is critical. Emphasizing their learning journey fosters better adoption.
3. **Hypothesis-Driven Thinking:** Encouraging stakeholders to frame their needs in terms of testable hypotheses improves clarity and focus.
4. **Perspective Taking:** Considering the stakeholder's point of view enhances understanding and supports effective storytelling in presenting data insights.
5. **Customization:** Avoiding one-size-fits-all approaches by deeply listening to stakeholders' unique problems and tailoring solutions accordingly is essential.
6. **Value Demonstration:** Clearly articulating "what's in it for me" and showing how analytics align with stakeholder goals, ROI, and the firm's broader mission strengthens engagement.
7. **Data Literacy:** Increasing stakeholder awareness and understanding of data fosters better collaboration and reduces knowledge gaps.
8. **Open Access:** Initiatives like biweekly office hours create opportunities for stakeholders to ask questions and build their confidence in using data.
9. **Manager Involvement:** When persuasion fails, escalating issues to the stakeholder's manager can encourage engagement.
10. **Active Listening:** It's important to uncover not just what stakeholders *want* but also what they *need*.