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Elevate The Frontline To Elevate The Business

Adopting Frontline Technology Boosts Business Success And EX

A FORRESTER CONSULTING THOUGHT LEADERSHIP PAPER COMMISSIONED BY WORKJAM, MARCH 2023

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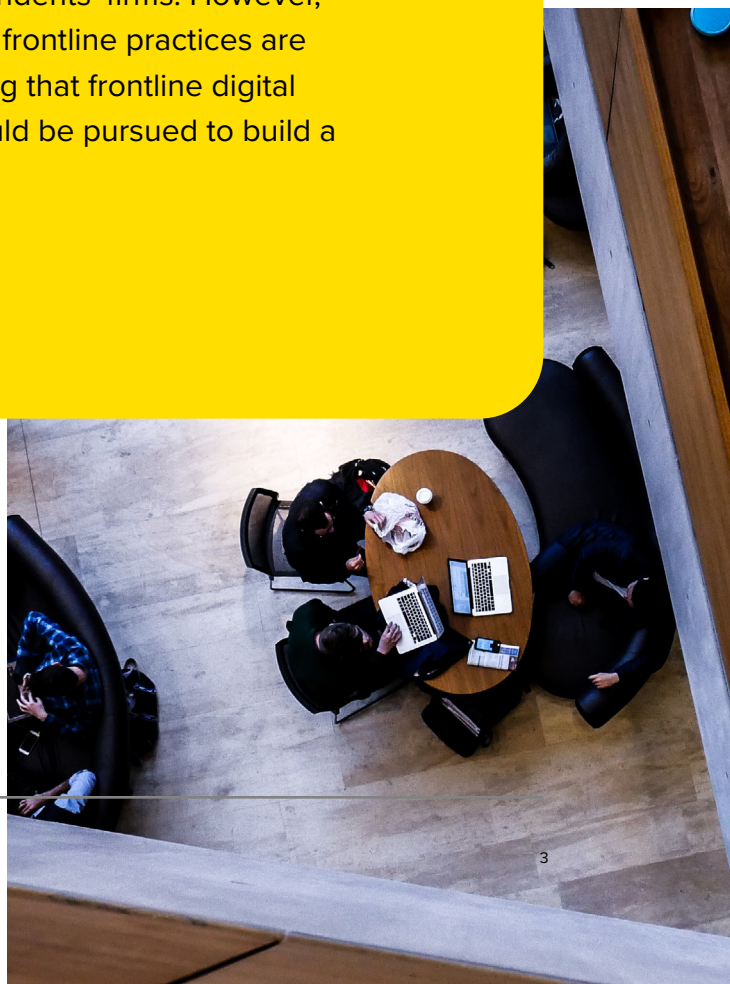
Executive Summary

Arming frontline employees with the technology they need to do their jobs well directly contributes to the overall health and success of a business. Frontline employees are those who must be physically present at work and who often perform tasks that require human-specific skills, including interacting with customers. A successful frontline should be armed with technology to aid and empower frontline employees across four operational pillars of frontline work: scheduling, training and learning, task management, and communications. Doing so results in a happier, more engaged frontline and facilitates business success from the bottom-up. However, some firms are not sufficiently investing in frontline technology, keeping digital transformation in the corporate realm and leaving frontline workers and their managers to rely on outdated technology, if they have any at all.

In November 2022, WorkJam commissioned Forrester Consulting to evaluate the state of technology-enabled frontline work operationalization and its impact on business success and frontline employee experience (EX). Forrester conducted an online survey with 502 HR, operations, and IT leaders at companies with over 5,000 frontline employees to explore this topic. We found that digital transformation initiatives have not yet reached the frontline at nearly three-quarters (73%) of respondents' firms. However, respondents whose firms have more mature digital frontline practices are seeing benefits across their organizations, indicating that frontline digital transformation is a worthwhile investment that should be pursued to build a better, more successful business.



Key Findings

Decision-makers mistakenly feel they must choose between EX and business success. Instead of connecting successful frontline EX to successful business outcomes, decision-makers prioritize conventional indicators of success like profitability and efficiency, assuming they can't have both.

Organizations are struggling to expand the reach of digital transformation initiatives to the frontline. Multiple, disparate tools in use, a heavy reliance on print/nontech, and difficulties with organizational and technological silos are preventing digital transformation initiatives from reaching the frontline despite the proven impact these initiatives have on both operational success and EX.

The companies that invest in operational technologies for their frontline are more mature. Investing in tools and technologies across the four operational pillars of frontline work — scheduling, task management, training and learning, and communication — builds a mature frontline and increases employee morale and retention.

A mature frontline reaps business results. The more advanced an organization's adoption of frontline operationalization technologies is, the more likely they are to overperform on revenue and overall business goals, including increased operational efficiency, customer experience (CX), brand differentiation, and reduced costs.

Decision-Makers Are Not Connecting Frontline EX To Business Success

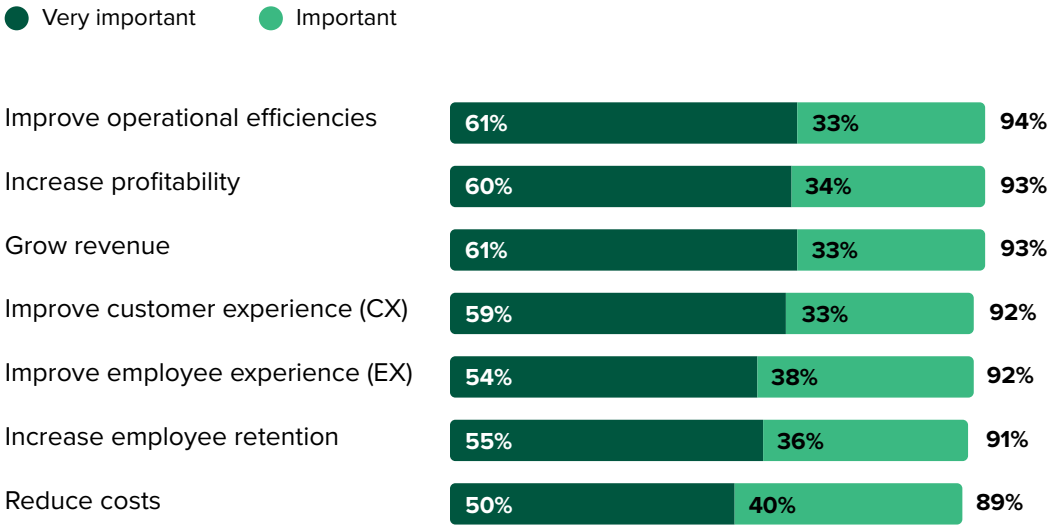
The nature of work is changing, and nowhere is that clearer than on the frontline. The COVID-19 pandemic added to and amplified growing concerns about the treatment of frontline employees, making way for the "Great Resignation." Subsequent frontline organizing and unionization to push for better pay, more flexible scheduling, and fairer labor practices in general have shaken up the status quo.

Forrester believes that when frontline workers struggle, business leaders will, too, and — eventually — the business itself will suffer.[1] However, most surveyed decision-makers struggle to make this connection and end up focusing on outcome-oriented business goals rather than connecting the satisfaction of employees, including those on the frontline, to business success. We found that:

- **EX as a business priority falls below more conventional goals.** When asked to assess the importance of their business goals, decision-makers agreed on the importance of everything from increasing revenue to improving EX (see Figure 1). However, when asked to rank those same goals, prioritizing and subsequently acting on improving EX took a backseat to more bottom-line-focused business goals like increasing profitability, growing revenue, and reducing costs (see Figure 2). Survey respondents' rankings divided these business goals into three categories: the business, the people, and the process. The clear drop in priority between business-oriented goals and people- and process-oriented goals brings decades-old assumptions about what makes a successful business to bear, with respondents failing to see how improved processes that empower employees drive the desired successes. Better-resourced employees are more engaged and productive, increasing operational efficiencies. Better efficiency and productivity grow revenue and increase profitability. Indeed, the universal importance of the goals in Figure 1 is perhaps a truer representation of what a successful business is.

Figure 1

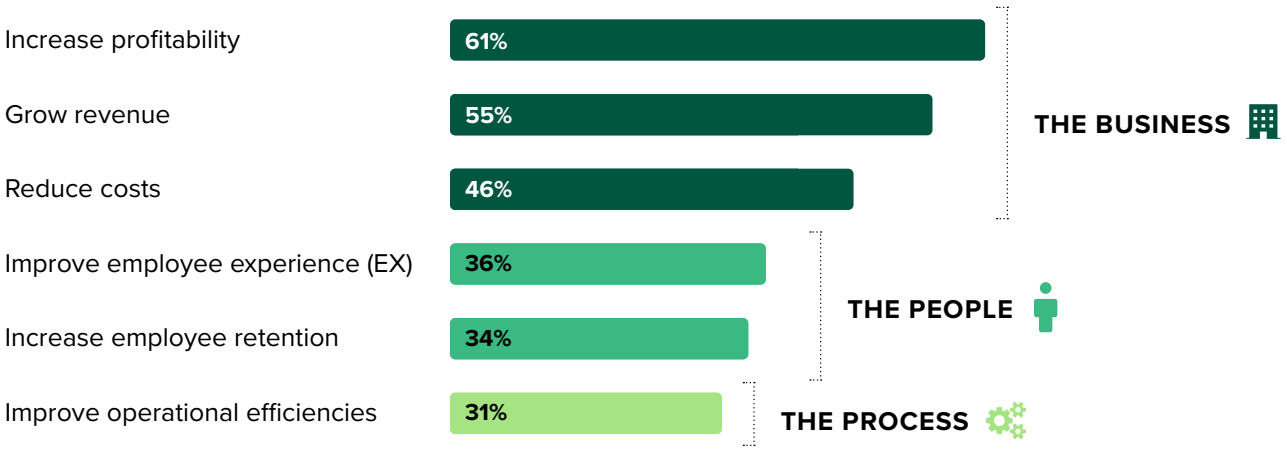
Everything Is Important, So What Are Decision-Makers Prioritizing?



Base: 502 global decision-makers in employee scheduling, communication, task management, and learning
Note: Total percentages may not equal separate values due to rounding.
Source: A commissioned study conducted by Forrester Consulting on behalf of WorkJam, February 2023

Figure 2

Organizations' Goals Put Business First, People Second



Base: 502 global decision-makers in employee scheduling, communication, task management, and learning
Source: A commissioned study conducted by Forrester Consulting on behalf of WorkJam, February 2023

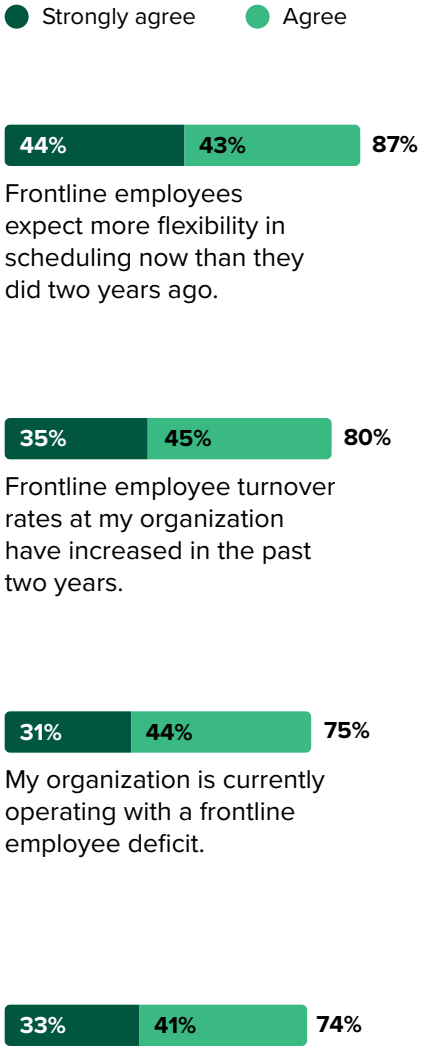
- **Frontline employees are demanding more and moving on when their needs are not met.** Decision-makers agreed that frontline employees expect more flexibility in scheduling than they did two years ago (87%), and 74% believed that frontline employees are rejecting work norms and conditions that previously went unchallenged (see Figure 3). At the same time, 80% of respondents saw frontline employee turnover increase at their organizations. With a surplus of jobs compared to jobseekers contributing to a frontline employee deficit, frontline employees have more choices and are willing to pursue new opportunities to get what they want.
- **There are business consequences of not investing in the frontline.** When considering the potential consequences of not improving frontline EX at their organizations, respondents noted increased costs associated with hiring and onboarding, employee burnout, and decreased productivity and output. Poor EX practices inhibit engagement and productivity while attrition remains a costly problem for frontline-worker-reliant industries.[2] At the same time, workloads are increasing and employees are taking on more, causing stress and eventual burnout. This directly impacts productivity as well as CX. The 92% of decision-makers who rated improving CX as important or very important must connect dissatisfied customers with dissatisfied frontline employees to create better experiences for both.

51% $ $ $ $ $

of respondents worried about increased costs associated with hiring and training new frontline employees.

Figure 3

Firms Experience High Frontline Turnover As Work Norms Change



Base: 502 global decision-makers in employee scheduling, communication, task management, and learning
Source: A commissioned study conducted by Forrester Consulting on behalf of WorkJam, February 2023

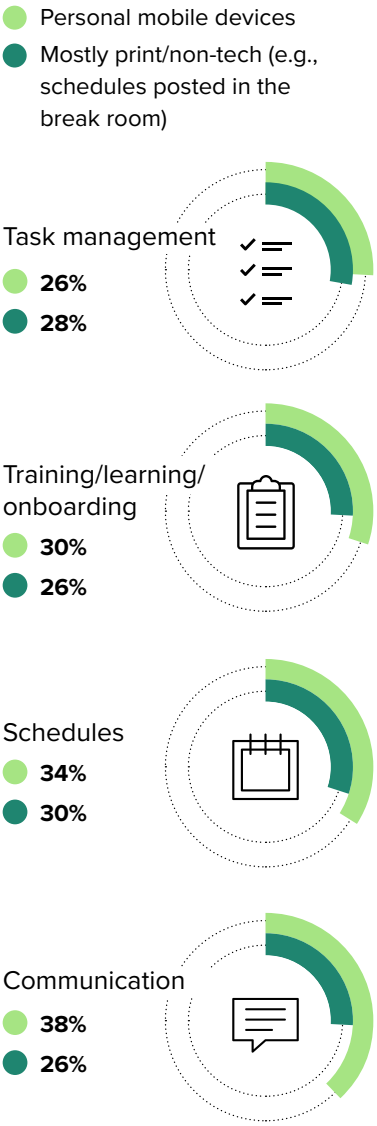
Digital Divides Heighten Business Risk

Investing in the digital capabilities of the frontline empowers and engages employees, contributing to successful business practices that positively impact everyone from the frontline to the C-suite to the customer. However, decision-makers continue to frame the opportunity to improve frontline EX as a cost or a risk rather than as the opportunity to meaningfully move the entire organization toward improved outcomes. Because of this, organizations essentially put themselves at business risk. We found that:

- **Investment in effective digital capabilities has not made it to the frontline.** Pandemic-driven digital transformation initiatives have transformed office workers' jobs and streamlined and modernized the technology they use to do their work. Yet 73% of respondents noted that similar advances have not yet reached the frontline. How frontline employees access communications, training materials, schedules, and tasks is spread across digital and nondigital access points. Nearly one-third of respondents noted their organizations still use print and nontechnical means to reach frontline employees across these four operational pillars of frontline work, with scheduling being the most prevalent of nontechnical access points (see Figure 4). On the other side of the spectrum, access via personal mobile devices is also limited. Only 34% of respondents noted their organization's frontline employees can access their schedules via their mobile devices. If an employee forgets to check a schedule during their shift, they have to find other means of access when not onsite. By not investing in the digital transformation of the frontline,

Figure 4

Access Points For Frontline Employees



Base: 502 global decision-makers in employee scheduling, communication, task management, and learning
Source: A commissioned study conducted by Forrester Consulting on behalf of WorkJam, February 2023

decision-makers are missing an opportunity to achieve their operational goals by equipping frontline employees and their managers with the tools they need to do their jobs effectively.

- **Decision-makers are struggling to prioritize and invest in technology solutions.** The potential impact of adopting technologies to operationalize the frontline is being overshadowed by indecisiveness and disjointed priorities at higher levels. Decision-makers want to leverage technology to improve frontline EX, but 80% reported struggling with prioritizing what to invest in (see Figure 5). Within leadership, 71% of respondents reported the prioritization of process/efficiency-driven technology solutions over solutions that empower employees. These leaders fail to see that investing in technology to improve frontline processes undermines not only EX and employee engagement but also drags down the potential of the business.
- **Outdated, siloed technology hinders frontline employee operationalization.** Over half of respondents (51%) reported that different technologies in different regions or locations is a hindrance to improving EX. Given the proliferation of digital transformation initiatives in corporate spaces, a surprising 48% of respondents reported continued reliance on manual "break room" communications versus adopting and using actual technology to reach frontline employees. Similarly, if their businesses are using technology or applications at all, 46% of respondents reported that they are poor and/or outdated. Respondents' organizations are faced with technological problems on both sides of the spectrum. On one side, businesses are adopting too many, disparate, and now-outdated technologies to attempt to keep up with — rather than anticipate and act on — the needs of the frontline. On the other side, the frontline has little or no technology, cutting them off from headquarters and corporate offices. A digital rift exists between the frontline and headquarters that the right technology can help to close.

73%

of respondents reported that digital transformation initiatives have not reached their organization's frontline employees.

Figure 5

Firms Struggle To Create Better Digital Experiences For Frontline Workers

Base: 502 global decision-makers in employee scheduling, communication, task management, and learning
Source: A commissioned study conducted by Forrester Consulting on behalf of WorkJam, February 2023

Maturity Model: Optimized Frontlines Have Mature EX

A digitally transformed world should not exclude the frontline. To determine best practices for adopting frontline EX and operational technology, Forrester Consulting built a maturity model. Respondents' organizations were scored based on the degree of self-reported adherence to best practices across the four operational pillars of frontline work: scheduling, task management, training and learning, and communication. Respondents' organizations were divided into low-, medium-, and high-maturity groups. The most advanced group was compared to the least advanced to learn how adopting mature frontline EX and technology practices impacted their businesses. Within each pillar, organizational maturity was based on competencies within people/personnel, processes, and technology (see Figure 6).

WHAT ARE MATURE COMPANIES DOING TO DIGITALLY TRANSFORM THE FRONTLINE?

The realization that goals across business, people, and process are all connected and all influence each other, and the subsequent implementation of applications and technologies to better connect and streamline all three, indicate a highly mature organization. Organizations with high maturity scores are:

- **Adopting and optimizing technologies specifically for the frontline.** Highly mature organizations are more likely to have adopted technologies specifically designed to aid and enhance frontline operationalization. They are also more likely to be expanding and optimizing those technologies (see Figure 7). Mature organizations are investing in their frontline with technologies and applications that make scheduling, training and learning, task management, and communication easier and more accessible to frontline employees and their managers.

Figure 6

Frontline Operationalization Maturity Pillars

SCHEDULING

- **People:** Management/decision-makers give frontline workers more flexibility and control in scheduling, and welcome feedback about whether current scheduling processes meet employee needs.
- **Process:** Scheduling processes enable success for both managers and frontline employees. Investment in best-in-class scheduling processes is a high priority.
- **Technology:** Scheduling software is easy to learn and use; accessible on employee's mobile devices or tablets; and allows digital time-off requests.

EMPLOYEE COMMUNICATIONS

- **People:** Frontline employee communications culture is one that empowers workers to share their feedback and suggestions and delivers everything needed for frontline employee and manager success.
- **Process:** Communication processes make it easy for leaders to communicate with frontline workers and for frontline workers to communicate back to managers and leaders. Investment in frontline communications processes is a high priority.
- **Technology:** Frontline workers can easily access communications tools on mobile devices and tablets. Communications to frontline are measurable for uptake and impact. Frontline managers can easily use and adopt communications tools to interact with their teams.

TASK MANAGEMENT

- **People:** Task management tools allow frontline employees to choose tasks that interest them or that reward accomplishments with bonuses. Feedback is routinely collected from frontline workers to ensure task management tools meet their needs. Tools allow workers to prioritize and manage tasks in ways that work for them.
- **Process:** Task management tools allow employees to pick up unassigned tasks from a central task pool. The tools also put the right task in front of the right worker at the right time.
- **Technology:** Task management tools make tasks easy to adjust and roll out as frequently as needed. The technology is easily accessible on mobile devices and tablets.

EMPLOYEE TRAINING/LEARNING

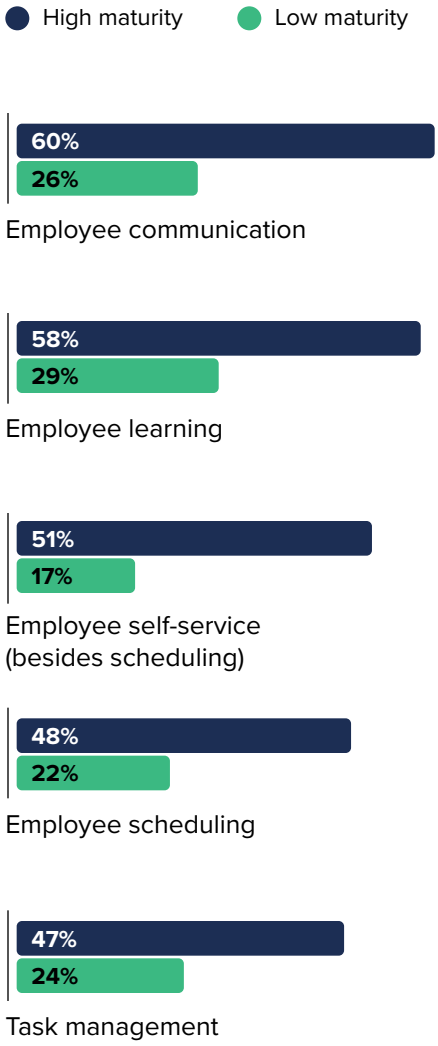
- **People:** Ongoing employee training programs deliver everything that frontline employees need to be successful. Feedback is routinely collected from frontline workers to ensure training needs are met. Organizational culture strongly encourages frontline employees to pursue training and learning that could further their careers.
- **Process:** On-the-floor microtraining and learning modules are embedded into frontline employees' day-to-day workflows. Training and learning processes make it easy for frontline managers to schedule and adjust training sessions or modules, with flexibility over when and how employees engage with learning.
- **Technology:** Frontline workers can easily access training and learning tools on mobile devices and tablets.

- **Going mobile.** The most mature organizations know that mobile access is necessary for the frontline. Across scheduling, communications, task management, and training and learning, the most mature organizations are adopting applications and technologies to enable frontline employees to access company resources on their personal mobile devices. For example, adding scheduling tools to mobile phones allows employees to access them anytime and anywhere. Optimizing those tools with added features like shift swapping gives employees the flexibility they desire, improving EX while giving employers a greater chance of seeing fully staffed shifts.[3]
- **Centralizing outreach initiatives.** Fragmented technologies across different regional headquarters and corporate offices are not the way forward for mature organizations. Instead, 66% of respondents whose organizations are highly mature noted they are centralizing outreach initiatives to better understand frontline workers at the corporate level compared to 24% of respondents at organizations with a lower maturity score. Top-down, two-way communication tools deliver information that frontline employees need while also creating a way for frontline employees to ask questions of and provide feedback to management.[4] Centralizing outreach and feedback means frontline employees and managers spend less time learning location-based technologies and can give feedback and updates and access the information they need to do their jobs quickly and easily.

Figure 7

Mature Organizations Optimize Frontline Technologies

(Showing "Currently adopted and expanding or optimizing")



Base: 502 global decision-makers in employee scheduling, communication, task management, and learning
Source: A commissioned study conducted by Forrester Consulting on behalf of WorkJam, February 2023

Strengthening The Frontline Strengthens The Business

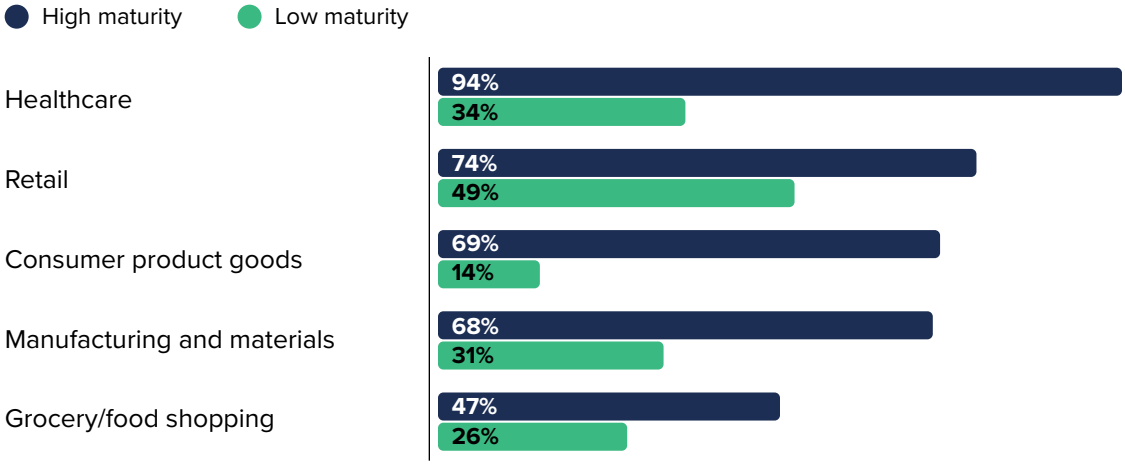
Mature organizations are investing in and optimizing advanced digital tools and capabilities that help frontline employees do their jobs better, empowering and steering them toward success. To frontline employees, feeling supported from the top-down to learn and succeed manifests in greater satisfaction at work. For decision-makers, frontline success is reflected in increased productivity, greater efficiency, and higher retention rates, which subsequently increase revenue, reduce costs, and ensure the continued success of the business.

Those organizations that have matured their frontline by responding to the communication, operationalization, and productivity needs of frontline employees by adopting applications and technologies that address the four operational pillars of frontline work are seeing benefits spanning their business. These include:

- **Double-digit revenue growth.** Successful, mature frontline EX and technology practices drive revenue growth. Overall, respondents' organizations that ranked highly mature were more likely to experience double-digit revenue growth (52%) compared to 32% of respondents' organizations with less mature frontline EX and technology practices. When examined at an industry-specific level, consumer product goods, retail, and healthcare industries saw the most significant differences in double-digit revenue growth between low- and high-maturity respondents' firms with manufacturing and materials and grocery/food shopping rounding out the top five (see Figure 8).
- **A mature frontline drives business success.** In addition to growing revenue, mature organizations are realizing their organizational goals at higher percentages compared to less mature organizations (see Figure 9). From conventional business goals to more people and process-oriented goals, mature organizations are seeing success. Improved operational efficiencies was an expected top spot given the role of the frontline at an organization. However, across all critical goals, respondents' organizations with a more mature, technologically advanced frontline saw more success.

Figure 8

High-Maturity Firms More Likely To Experience Double-Digit Revenue Growth

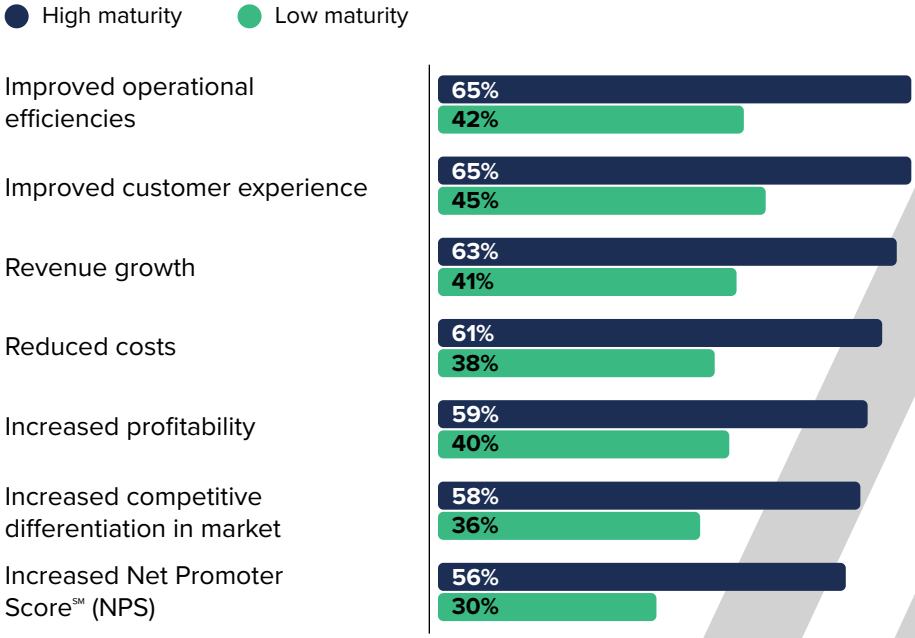


Base: 502 global decision-makers in employee scheduling, communication, task management, and learning
Note: Showing top 5 growth industries
Source: A commissioned study conducted by Forrester Consulting on behalf of WorkJam, February 2023

Figure 9

A Technologically Mature Frontline Reaps Business Benefits

(Showing "This is a benefit already realized.")



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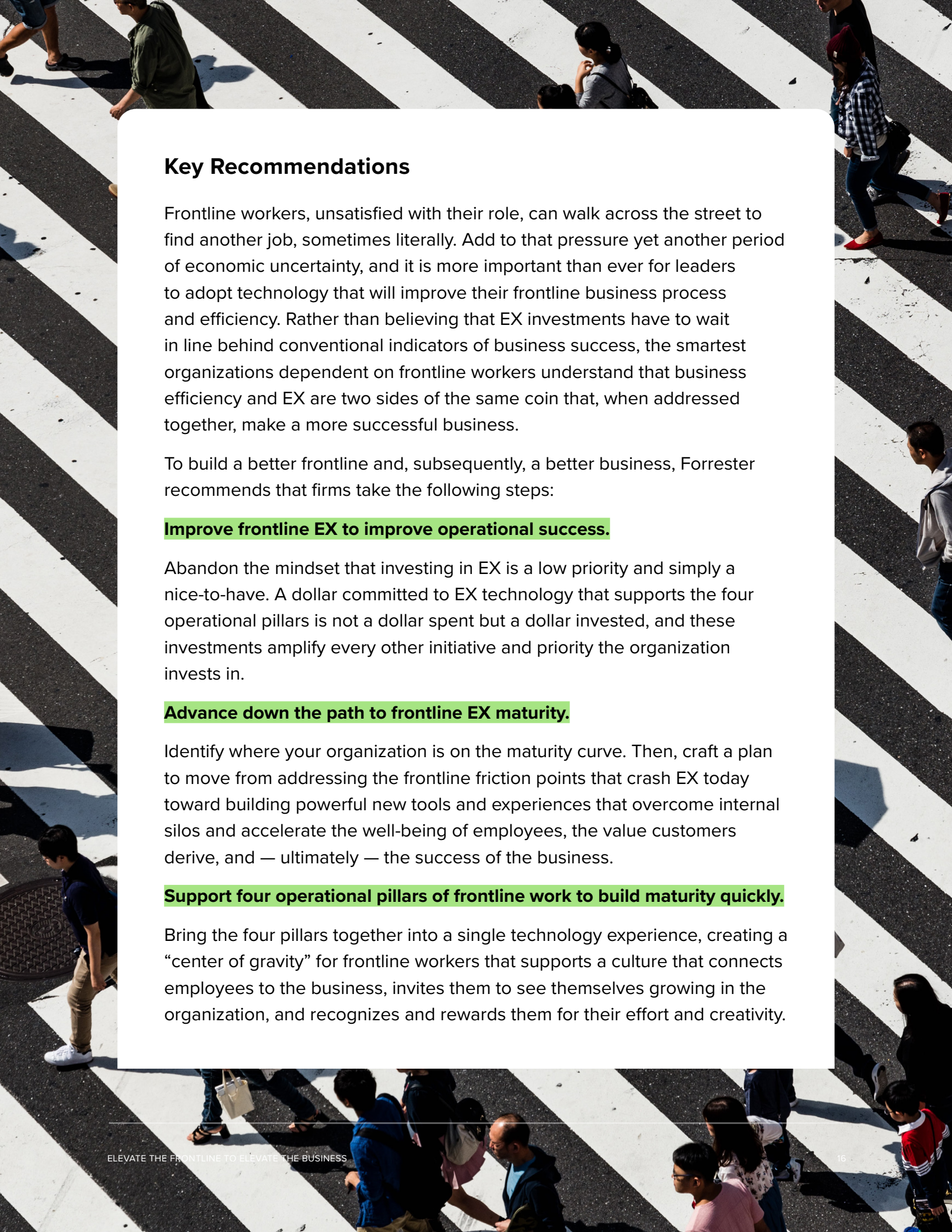


Key Recommendations

Frontline workers, unsatisfied with their role, can walk across the street to find another job, sometimes literally. Add to that pressure yet another period of economic uncertainty, and it is more important than ever for leaders to adopt technology that will improve their frontline business process and efficiency. Rather than believing that EX investments have to wait in line behind conventional indicators of business success, the smartest organizations dependent on frontline workers understand that business efficiency and EX are two sides of the same coin that, when addressed together, make a more successful business.

To build a better frontline and, subsequently, a better business, Forrester recommends that firms take the following steps:

Improve frontline EX to improve operational success.

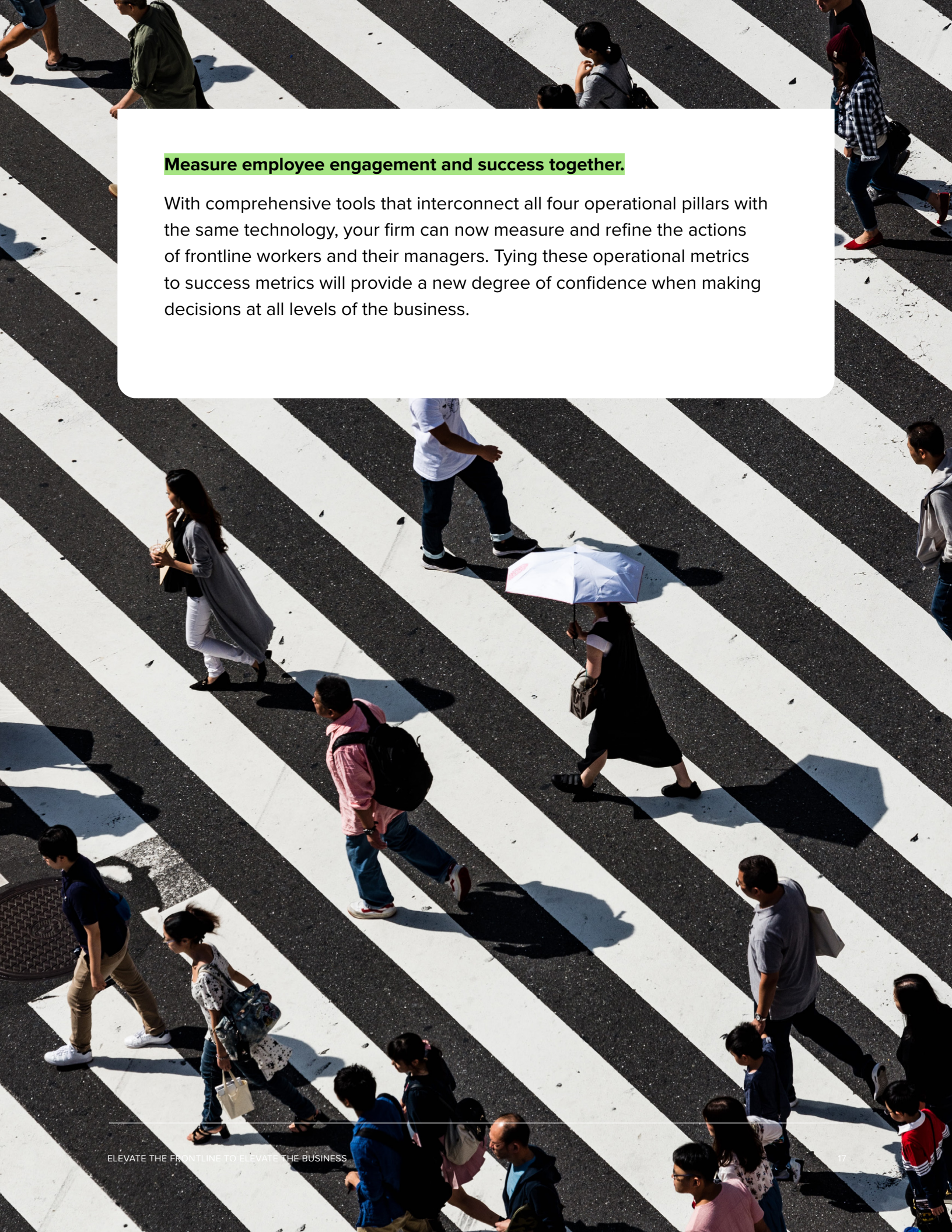
Abandon the mindset that investing in EX is a low priority and simply a nice-to-have. A dollar committed to EX technology that supports the four operational pillars is not a dollar spent but a dollar invested, and these investments amplify every other initiative and priority the organization invests in.

Advance down the path to frontline EX maturity.

Identify where your organization is on the maturity curve. Then, craft a plan to move from addressing the frontline friction points that crash EX today toward building powerful new tools and experiences that overcome internal silos and accelerate the well-being of employees, the value customers derive, and — ultimately — the success of the business.

Support four operational pillars of frontline work to build maturity quickly.

Bring the four pillars together into a single technology experience, creating a "center of gravity" for frontline workers that supports a culture that connects employees to the business, invites them to see themselves growing in the organization, and recognizes and rewards them for their effort and creativity.



Measure employee engagement and success together.

With comprehensive tools that interconnect all four operational pillars with the same technology, your firm can now measure and refine the actions of frontline workers and their managers. Tying these operational metrics to success metrics will provide a new degree of confidence when making decisions at all levels of the business.

Appendix A: Methodology

In this study, Forrester conducted an online survey of 502 HR/EX, operations, and IT leaders at companies with over 5,000 frontline employees across North America, Europe, Asia, and Australia to evaluate the state of technology-enabled frontline work operationalization and its impact on business success and frontline employee experience. Survey participants were responsible for employee management strategies for task management, communication, learning, and/or scheduling and worked at consumer product goods, food and/or beverage service, grocery/food shopping, healthcare, hospitality and travel, manufacturing and materials, or retail organizations. Respondents were offered a small incentive as a thank-you for time spent on the survey. The study began in November 2022 and was completed in February 2023.

Appendix B: Demographics/Data

COUNTRY	
United States	**31%**
United Kingdom	**19%**
Canada	**9%**
Australia	**8%**
Germany	**6%**
France	**6%**
Norway	**4%**
Singapore	**4%**
China	**4%**
Sweden	**3%**
Japan	**2%**
Thailand	**2%**
Finland	**2%**
Denmark	**1%**

NUMBER OF FRONTLINE EMPLOYEES	
5,000 to 9,000	**51%**
10,000 to 14,999	**28%**
15,000 to 19,999	**12%**
20,000 or more	**9%**

INDUSTRY	
Manufacturing and materials	**19%**
Retail	**18%**
Hospitality and travel	**14%**
Healthcare	**13%**
Consumer product goods	**13%**
Food and/or beverage service	**12%**
Grocery/food shopping	**11%**

RESPONDENT DEPARTMENT	
IT	**36%**
Operations	**35%**
HR/EX	**30%**

INDUSTRY	
Manufacturing and materials	**19%**
Retail	**18%**
Hospitality and travel	**14%**
Healthcare	**13%**
Consumer product goods	**13%**
Food and/or beverage service	**12%**
Grocery/food shopping	**11%**

RESPONDENT LEVEL OF RESPONSIBILITY	
Director 58%	**31%**
Vice president 25%	**19%**
C-level 18%	**9%**

LEADERSHIP ROLE IN COMMUNICATION	
Final decision-maker	**65%**
Decision influencer	**29%**
Strong working knowledge of decisions	**5%**

LEADERSHIP ROLE IN TRAINING/ LEARNING	
Final decision-maker	**65%**
Influence decisions	**28%**
Strong working knowledge of decisions	**6%**

Note: Percentages may not total 100 because of rounding.

LEADERSHIP ROLE IN TASK MANAGEMENT	
Final decision-maker	**66%**
Decision influencer	**29%**
Strong working knowledge of decisions	**5%**

Note: Decision-maker percentages do not always add up to 100 because only one out of four needed to be selected to move forward.

LEADERSHIP ROLE IN TRAINING/ LEARNING	
Final decision-maker	**65%**
Influence decisions	**28%**
Strong working knowledge of decisions	**6%**

Appendix C: Endnotes

[1] Source: "A Human-Centered Frontline Workforce Strategy Allows All Stakeholders To Thrive," Forrester Research, Inc., August 29, 2022.
[2] Source: Ibid.
[3] Source: Ibid.
[4] Source: Ibid.

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