



CX24

AUTHENTIC ROOTS. AMBITIOUS PURSUITS.

CSI

EVOLVING THE

EMPLOYEE

EXPERIENCE



Hi there! I am Roxanne,  
**Chief People Officer** for **CSI**.  
I lead our talent strategy,  
culture and the reimagining  
of our employee experience.  
I am excited to help you  
think about and evolve your  
employee experience!

**ROXANNE MARTINEZ**  
Chief People Officer, CSI

Poll 1

**What words come to mind  
when you think of an experience?**

# AN EXPERIENCE IS...

- an event or occurrence that **leaves an impression** on someone; feel (an emotion)
- a particular instance of **personally encountering or undergoing** something: *my attendance at the conference was an informative experience.*
- the process or fact of **personally observing, encountering or undergoing something**: *experience at a place/concert/spa/sporting event*
- to have experience of; meet with; **undergo; feel**: *to experience joy*
- **knowledge, skills, emotions and perceptions acquired through direct participation, observation or exposure** to events, activities or situations

## Poll 2

**Now, when you think of the  
Employee Experience, what comes to mind?**

The employee experience is the quality of **emotional connection** that an employee has with an organization.

It is shaped by their interactions with **people, policies, processes, and technologies** during **significant moments in their journey** with the organization.

It **includes everything an employee encounters** from the time they apply for a job until well after they leave an employer – it is **not** a single event.

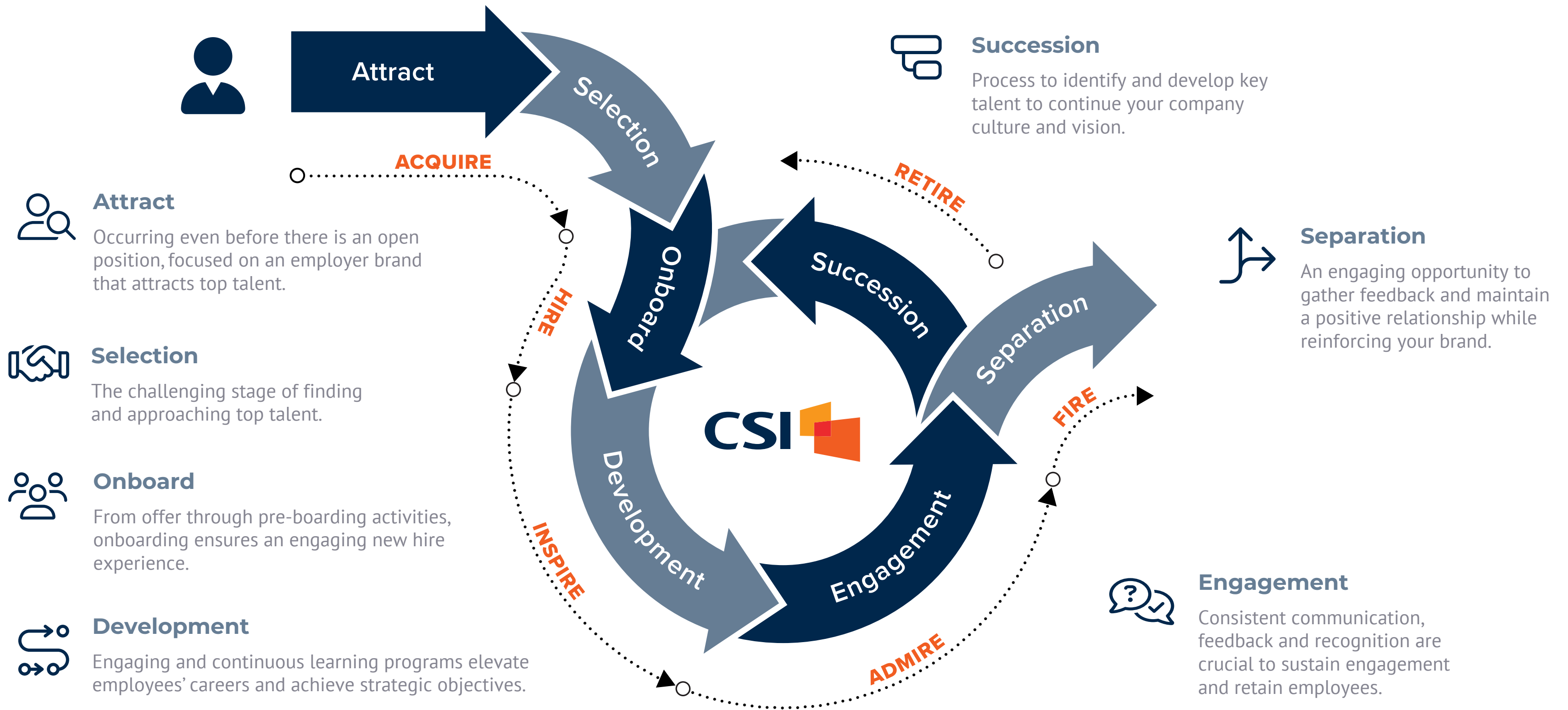
It is the way in which employees **internalize and interpret** the interactions they have with their organization.

It requires **constant evaluation, sharing of perspectives and action.**

Strong employee experiences can result in employees **having a deep connection and sense of purpose at work** that drives **extra effort and commitment.**



To have the most optimal employee experience, you need to think about the employee journey as an **integrated** whole...



# NOT A SERIES OF **ISOLATED** VERTICAL FUNCTIONS/ACTIONS/PROCESSES

- ✓ Recruitment
- ✓ Compensation
- ✓ Benefits
- ✓ HR Systems
- ✓ HR Analytics
- ✓ Employee Relations
- ✓ Diversity and Inclusion
- ✓ Performance Management
- ✓ Succession Planning
- ✓ Learning and Development
- ✓ Policy Administration
- ✓ Etc.

# WHY IS FOCUSING ON THE EMPLOYEE EXPERIENCE IMPORTANT?

- Stronger financial performance
- Higher customer satisfaction
- Higher levels of employee engagement
- Better retention of employees with lower turnover rates
- Enhanced performance and innovation
- Demonstrated improvements in employee well-being and work/life co-existence
- Strengthens employer brand to attract top talent

## Poll 3

Do you believe your organization has an integrated employee experience that **puts employees first** and **brings your culture to life**?

- A. No, we are thinking about isolated events
- B. Functional leads strategize and execute together
- C. Programs and functions talk to each other but that's about it
- D. Yes – we've totally got this and we're winning awards

# HOW DO YOU **EVOLVE** YOUR EMPLOYEE EXPERIENCE?

- Articulate your organizational goal and mission
- Understand baselines
- Establish your talent aspiration
- Frame your common purpose and expectations
- Work with employees to define moments that matter
- Measure results
- Ask for feedback continuously
- Pivot as needed
- Repeat...

# Articulate your mission...

## At CSI, Our Mission is

We deliver comprehensive solutions and open technologies that empower community and regional banks to achieve their distinct goals.

## And Our Vision is

We will cement our position as the preferred partner and help shape the future of banking by fueling growth and retention for our customers and delivering solutions that enable them to rival every competitor.



Cost of Hire Time to Fill Open Positions Leavers Within 3 to 6 Months of Hire Demographics

Succession Plan – Number of Internals % Employees Who Attend at Least One Training Event

Employee Relations Issues Lateral Moves Retention Rates by Demographics Promotions

% Employees Completing Performance Reviews Talent Review Results Internal Mobility Rates

# Take stock of what your talent metrics are telling you...

Retention Rates by Demographics Employee Relations Issues Lateral Moves

Talent Review Results Internal Mobility Rates Employee Relations Issues Performance Reviews


Lateral Moves Quality of Hire Number of Candidates per Requisition Employee Relations Issues

Number of Candidates per Requisition Employee Relations Issues Lateral Moves Quality of Hire

% of Employees with Goals Engagement Rates by Demographics Turnover by Demographics

Cost of Hire Time to Fill Open Positions Leavers Within 3 to 6 Months of Hire Demographics

Succession Plan – Number of Internals % Employees Who Attend at Least One Training Event



**Aspire for the best environment with a bold, audacious goal you can measure**

- Target engagement score/eNPS
- Better than benchmarks
- Great Place To Work
- Best Place to Work list(s)
- Glassdoor ratings
- Employee Wellbeing Score
- Employee Trust Score
- The list has infinite possibilities...



Define what you  
want your work  
environment to be



*When you're surrounded by people who share a passionate commitment around a common purpose, anything is possible.*

**HOWARD SCHULTZ**  
FORMER CEO OF STARBUCKS

*Your employees are your company's real competitive advantage. They're the ones making the magic happen – so long as their needs are being met.*

**RICHARD BRANSON**

*Great companies are built by people who never stop thinking about ways to improve the business and to advance its mission.*

**JOHN MACKKEY**  
CO-FOUNDER AND CEO OF WHOLE FOODS MARKET

*In order to build a great company, you have to build a great culture. And to do that, you have to have a common purpose.*

**MARC BENIOFF**  
CEO OF SALESFORCE

A Common Purpose related to the employee experience, coupled with associated expectations...

- **Unifies and aligns the company, its leaders and people around a shared vision regarding the work environment**
- Channels collective efforts toward that vision –fostering collaboration, cooperation and a sense of belonging, as well as ownership
- Frames expectations of all in an organization
- Reduces ambiguity of roles and responsibilities

# AT CSI, OUR COMMON PURPOSE IS...

We will **create and nurture** an **enriching, rewarding, and inclusive** work environment, which **enables** our company's performance as our people **learn, develop and grow** a career, while being **inspired and empowered** by **capable** leaders.

## Expectations are:

- Company will define the “how” we will achieve our goals and mission through core competencies Integrated into talent practices
- Leaders are being held accountable for having a talent mindset/management
- All of our people own their development



# DEFINING MOMENTS THAT MATTER



Paid Fairly



Mentioned



Challenged



Promoted



Involved



Appreciated



Valued



Mission Driven



Empowered



Trusted

# Knowing those moments, you can seek change...



## UTILITY

What are the fundamentals an employee needs to work?

- Bare-bones tools
- Desk, chair, phone and computer
- Employee is truly a cog



## PRODUCTIVITY

What do employees need to work better and faster?

- Slight improvements to get more out of people
- Employee optimization
- Repeatable processes
- Clear expectations



## ENGAGEMENT

How can we make employees happy so they perform better?

- Annual survey
- Focus on culture
- Acts to motivate and inspire
- Employee aligns behind company mission



## EXPERIENCE

How can we create a company where people want to show up vs. need to show up?

- Focus on culture, technology and space
- Purposeful design
- Long-term approach
- Company has a reason for being/purpose
- Consistent dialog and transparency

**Measure**

**Evaluate**

**Pivot**

**Evolve**



Adopted from Shane Smith, EVP & CHRO, Tailored Brands



# Questions & Answers



THANK YOU!



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