

ANATOMY OF A DECISION

ENGAGEDLY HELPS CUSTOMERS PROVIDE AND MANAGE MODERN, POSITIVE EMPLOYEE EXPERIENCE

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What You Need to Know

It has long been understood that employee experience is critical to a company's success. However, companies that prioritized employee experience over risk mitigation and revenue increases were few and far between — until recently. The mass exodus from the office to remote and hybrid work environments has rendered the link between employee experience and company performance undeniable. This sudden shift left business leaders and human resources practitioners urgently solving complex challenges like maintaining productivity in an uncertain time. Over time, these shifts have created a competitive candidates' market that highlights the powerful influence of employee satisfaction on retention.

A critical component of employee satisfaction is engagement. An engaged employee is a productive and dedicated employee who will serve a company and its customers well for far longer than a disengaged employee. According to Gartner's "[Top 5 Priorities for HR Leaders in 2021](#)," 29 percent of HR leaders cite employee experience as a Top 5 priority for this year, and "employee engagement and employee experience strategies" as key.

In HR.com's recent study, "[State of Performance Management 2021](#)," 44 percent of human resources professionals cite the development of performance becoming more digital and technology driven. In fact, three-quarters of organizations surveyed currently use technology to support performance management. There are plenty of vendors of technology for human capital management (HCM) that offer employee engagement tools as part of their suite of services, and no doubt these solutions are appropriate for some. As is the case in so many fields, however, specialists are often better equipped to more adeptly satisfy the specific needs they address than are the generalists who offer a service as just one more on a growing list.

In this report, 3Sixty Insights delves into three companies that each decided to implement a specialist performance management solution, how each made the choice, and the benefits they expect to realize—and, in some cases, already have.

About Engagedly

Engagedly offers cloud-based software-as-a-service (SaaS) solutions for managing talent. Engagedly's People + Strategy platform helps evolve performance management, employee engagement, and employee development to drive successful organizational outcomes. Engagedly's unified platform combines the power of business strategy execution, talent enablement, and employee engagement

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AT A GLANCE

Solution

Engagedly

Research Participants

Convergent Media Group
Essex Bank
BSR

The Situation

- Inefficiencies in evaluating employee performance
- Related difficulties in setting compensation plans and bonus incentives
- Impediments to positive employee engagement
- Significant hurdles to supporting a positive employee experience

Success Highlights

- Engagedly's solution bringing order, efficiency, and flexibility to users' performance management and related activities
- Users seeing notable benefits early in their deployments of Engagedly
- Engagedly proving to be an intuitive, strategic choice resonating with these users' many internal stakeholders

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into one easy-to-use software solution. It's an employee-oriented platform with a diverse array of tools and a mission to "improve employee engagement by making the workplace fun and motivating." Engagedly serves companies of all sizes, though the majority of its client companies employ fewer than 10,000 people. Regular announcements of new partnerships highlight Engagedly's focus on integration with other service providers. In addition to employee engagement and communication, one of Engagedly's areas of expertise is the objectives and key results (OKRs) methodology of goal-setting, built into its solutions.

Organizations Interviewed

3Sixty Insights spoke with Engagedly and representatives from three of its clients: a non-profit consultancy, a digital media agency, and a bank. Each of these three organizations' representatives spoke with 3Sixty independently. Before adopting Engagedly, each client was dealing with its own onerous combination of non-integrated systems that limited potential and required excessive time to support.

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Sarah Brettschneider is the people operations manager at BSR, a non-profit consulting agency. When Brettschneider joined the organization, BSR was using McLean for new hires and exit surveys, Cornerstone PiiQ for performance management, and Udemy for learning management. Including employees and interns, an average of 150 individuals were tracked and supported through these systems.

Diona Perkovic spoke with 3Sixty on behalf of Convergent Media group, where she is the senior people and culture business partner. Having deployed Engagedly in 2019, the company is nearing the end of a concerted, deliberate, methodical effort to liberate the process of tracking performance evaluations through Excel documents saved to Google Drive. Between 190 and 200 employees are about to be tracked through Engagedly, instead (as the average headcount for 2021 was 196, and the company aims to increase this headcount to 200 over the next year).

Representing Essex Bank was HR Specialist Justin Kimlel. Prior to implementing Engagedly, Essex Bank was using another solution for performance management as well as recruitment. The multi-step annual reviews for 250 employees were all conducted through this other system.

During these conversations, 3Sixty gained a better understanding of the operational challenges that drove these three companies to

About Engagedly

Engagedly is an award-winning provider of talent management solutions. Built upon best practices and decades of research, Engagedly's People + Strategy platform helps evolve performance management, development and engagement to produce successful outcomes for a global clientele of employers of all sizes. Functionality supports the following:

- Strategic Goal/OKR Alignment and Tracking
- OKR Consulting and Certification
- Improving Employee Communication
- Ongoing Check Ins and Project Reviews
- Sharing and Rewarding Ideas and Innovation
- Measuring and Improving Employee Engagement
- New Employee Onboarding for a Better Employee Experience
- Driving Cultural Alignment
- Leadership Assessment and Succession Planning
- Developing People for Growth and Retention
- HR and Compliance Training

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adopt Engagedly. 3Sixty also discussed with the three representatives the benefits they saw from implementing Engagedly from resources-, cost-, and time-savings perspective, as well as in terms of additional capabilities.

Key Challenges that Drove Investment

All three representatives cited challenges related to ease of use and efficiency with their previous solutions. The disparate, unintegrated systems created unnecessary administrative burden, wasted time that could be better spent elsewhere, and limited the organization's ability to pursue new initiatives.

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At the non-profit BSR, Brettschneider is part of a small team and responsible for managing systems. It's worth noting that prior to Brettschneider's arrival, the various tools in use had been chosen by several previous members of the team and at different times. Brettschneider's primary aim was to simplify. She thought that by cutting down the number of products BSR was using, she could both reduce administrative tedium (freeing up time for other responsibilities) and lower costs (particularly important for a nonprofit organization). The several different tools in use when she joined the company did not communicate with one another. Each employee event needed to be recorded in each system, and she noted that the employees were also frustrated with the sprawling and mostly unintegrated ecosystem. The disparate tools added up to a costly and non-cohesive system. They stopped using McLean & Company shortly after she joined. Her sense was that it was designed for organizations larger than BSR and that they were paying for functionality they just didn't need. Overall, the ecosystem was not as flexible as she would have liked. Cornerstone was proving limited in terms of capabilities, and Udemy simply didn't integrate with any of the other systems in use. At the same time, BSR was working to reshape performance management: they wanted to provide agile feedback that would be continual, both timely and time-sensitive, and able to move independently from HR. They planned to shift from a goal-oriented system to one focused on capabilities and behaviors.

At Convergent Media, Perkovic sought to introduce more automation to her team's operational and administrative activities, knowing that would free up time for more big-picture, strategic projects. For performance evaluations, she was dissatisfied with the current process, which she says was neither valid nor relevant and was lacking in a holistic approach. Tracking performance evaluations in Excel via Google was logistically challenging and inefficient. Perkovic cites time loss and, to a lesser extent, human error and notes that the manual process was making reviews late. She wanted to change

Decisions: Essex Bank

Essex Bank was considering two pathways: replacing their HRIS altogether, or addressing only the performance management piece of it. In the end, the employer concluded that Engagedly was more affordable and easier to implement than a full-scale HRIS would have been. As a specialist, Engagedly was better-equipped than the full-suite systems considered to address Essex Bank's specific performance management needs.

- Engagedly built Essex Bank its own "testing sandbox," which enabled the team to become comfortable with platform functionality and feel confident demonstrating it to stakeholders
- The platform connects well with Essex Bank's HRIS
- A toolbar giving users access to associated files as they write an employee's review is "a big seller"
- Engagedly's notes section enabling Essex Bank management to track coaching sessions and add other memos is cloud-based, so the team is not limited by volume

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things when she joined the company; in particular, her department and company leadership reached the mutual conclusion to move to OKR methodology.

Kimlel noted that Essex Bank's issues with the existing interface were creating roadblocks. The system they had was unengaging and off-putting for employees, and multiple logins from system to system discouraged usage. Annual reviews were particularly tedious and often past due, as poor communication within the system from step to step slowed the review process considerably. It also obscured the audit trail, especially challenging as past-due performance reviews are a key item in the bank's audits. He also noted that Essex Bank was missing opportunities for coaching and morale-boosting with the annual review system. "Waiting an entire year to tell somebody that they're doing a great job, or that they need to see improvements is setting that associate up for failure." Recognizing that the inability to provide prompt coaching to an associate who needs it "loses that opportunity to turn them into a high-performing associate," the company wanted to transition to a modern and interactive, continual employee evaluation process. They also wanted performance reviews to be shorter and more to the point, which they realized would be more feasible by conducting reviews more frequently.

Considerations in Evaluating Solutions

All three representatives said that they initially sought to meet their organizations' needs with existing solutions. (In the case of Convergent Media, Engagedly was already in place.) As BSR's Brettschneider noted, it would be more cost-effective to make an existing solution work, but only if they could get the functionality they needed to solve the problems they were experiencing.

Brettschneider started with Cornerstone, asking the employer's Cornerstone sales representative to show her the options. The learning system Cornerstone OnDemand was able to offer was expensive, and Brettschneider didn't see all the capability she hoped to deploy. She also explored ADP, since BSR already had ADP implemented for a human resource information system (HRIS). Finding that ADP's in-house solutions didn't suit her needs, she tried several demos from the ADP Marketplace, a collection of partner companies that integrate with ADP. Here she found Trakstar, which became the other primary contender in her search for a solution. With Engagedly and Trakstar to evaluate, she brought in a colleague from HR. "I was very grateful that my manager gave me free rein to go and figure it out."

For Perkovic at Convergent Media, a primary consideration was that the company was already working with Engagedly. The team completed an Engagedly workshop on the platform's full utilization as part of the search for a solution. She did get suggestions of other platforms from fellow business leaders, but she declined them, pointing out that the company had already invested the time and energy "and decided that this platform is everything that we can ask for in having OKR methodology-based performance management."

Decisions: Convergent Media Group

Convergent Media already had Engagedly in place and wanted to make the most of it. Most notably, Engagedly supports OKR methodology, making possible the automation and time savings Convergent Media wanted.

- The employer finds Engagedly support and customer service excellent
- The platform supports Convergent Media in training staff to use Engagedly to its full extent
- Engagedly interfaces with Convergent's ERP system, easing implementation
- The platform runs on a variety of devices, resulting in flexibility difficult to find in other solutions

Engagedly also offers plenty of further potential for future initiatives at Convergent Media. Going forward, the employer will be using additional Engagedly tools to support the strategic plan.

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At Essex Bank, Kimlel first got approval to explore options from the CEO. He says that they were not very impressed with their existing HRIS system, because “it does some things well, but nothing great.” They considered two courses of action: they could replace it with a whole new system, or they could find an alternative to the performance management element alone. The former would be more costly and time-consuming, but Kimlel nevertheless spoke with several providers of broad HRIS-related capabilities, meeting with sales representatives and viewing their systems. He also looked at some systems that provided just the performance management piece, including Engagedly.

Reaching a Decision

All three customers identified clear differentiators that led them to select Engagedly. All three had determined Engagedly was the best option before bringing it to their decision-making team, and all three reported that the platform proved to be an easy sell internally. Interestingly, all three also reported that performance management was the critical selling point.

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Brettschneider and her HR colleague agreed that Engagedly was a better fit for BSR than Trakstar. Engagedly's flexibility was critical, and the vendor offered the only system Brettschneider found that would enable BSR to customize terminology to match the organization's internal lexicon. It also allowed her to pick and choose the most appropriate tools and to turn off the offerings that didn't fit the employer culture. She notes that they ruled out Trakstar in part because of BSR's global nature: they are moving to a PEO model in the US to employ more people across the country, and they will not be able to have any international employees in the system. Finally, they were very pleased to find that Engagedly, their preferred option, was offered at a more competitive price.

After reviewing with direct colleagues, Brettschneider took the proposed solution to BSR's internal People Council, which governs employee experience. She conducted a demo with this group, then showed it to the chief financial officer and the IT team. All stakeholders were enthusiastic about the prospect of a solution that would support BSR's performance management initiatives. The only real obstacle was concern about change management, and Brettschneider was able to make the case that she would handle it. Her cost analysis determined that BSR would save \$20,000 per year with Engagedly, a particularly attractive point at the start of

Decisions: BSR

For BSR's decision, Engagedly's flexibility and customizability were critical. Specifically, the platform's ability to accommodate and adapt to BSR's particular needs was a differentiator, and BSR found support and customer service excellent.

- The employer can customize its own iteration of Engagedly to reflect BSR's unique role lexicon
- BSR can activate tools that work best for its employer culture and turn off those unsuited to these purposes
- BSR is able to create a full suite of customized learning modules
- Engagedly gives BSR the ability to tailor surveys, so that all employee surveys are designed in-house and specifically for BSR
- Performance templates are customized with relevant feedback and key points

Further, the platform can better accommodate BSR's global workforce overall than other solutions considered.

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the pandemic. They also were happy with the terms of the contract, which allowed them an escape route if needed.

Justin Kimlel, HR specialist at Essex Bank, focused in particular on the performance management piece for making the business case. The board of directors was happy to hear of a solution, Engagedly, that would help solve the problem of the audit trail and the list of past due reviews that was increasing year after year.

At Convergent, Perkovic collected research from the Engagedly team and research she had done herself. She investigated the benefits and the risks of both utilization and non-utilization and conducted a SWOT analysis. Drawing on Perkovic's contributions here, the decision-making team comprised overall company leadership and the upper echelons of HR management at Convergent.

For Kimlel at Essex Bank, Engagedly “really shone as an easy platform.” Engagedly also built Essex Bank its own testing “sandbox,” which was helpful to the decision-making process. Because of it, Kimlel and his team were able to familiarize themselves with Engagedly's functionality, so that they were confident in their choice and in presenting it. They took the proposal to executive-level leadership, including in the decision-making a few senior staff members who could speak to their departments' likely usage of the new tool. Kimlel reports that “it was an easy sell; they were all interested in fixing the same problems.” He focused in particular on the performance management piece for making the business case. He knew that more than any other tool that Engagedly offers, this would appeal to the stakeholders. The board of directors was happy to hear of a solution that would help solve the problem of the audit trail and the list of past due reviews that was increasing year after year.

Implementation Experiences

All three representatives mentioned that Engagedly's ability to interface with their current solutions supported easy implementation.

At BSR, the organization's own content that had been uploaded to Udemy was able to be ported over to Engagedly. And Brettschneider reported that Engagedly is living up to the cost savings she estimated, eclipsing Engagedly's combined implementation- and SaaS-related fees. BSR committed to a 3-year contract.

At Essex Bank, implementation was also smooth. Kimlel notes that Engagedly's connectivity with the employer's existing HRIS was instrumental and saved them from manually converting vast amounts of data. Implementation took from the middle to the end of 2020. Essex Bank put performance reviews on hold during that time and focused instead on mapping out the new review process. They conducted a review in January 2021 to capture 2020 performance, and they were able to start true quarterly reviews this year.



Our ability to have continuous feedback, to have continuous surveys, has enabled us to have a better insight into the employee experience, which is a huge focus for my team right now. It's been crucial to have this ability to collect feedback.

Sarah Brettschneider

People Operations Manager
BSR

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All stakeholders were enthusiastic about the prospect of a solution that would support BSR's performance management initiatives. People Operations Manager Sarah Brettschneider's cost analysis, meanwhile, determined that BSR would save \$20,000 per year with Engagedly. She says that for every new hire, what previously took one hour is now taking ten minutes. Combine that 50-minute savings across 50 new hires and 30 terminations so far this year, and the time savings add up to 67 hours, more than a week and a half.

with Engagedly's in conducting managerial and employee training. Convergent does intend to use Engagedly to support other, long-term business transformation goals, but for now, they are focusing on the fundamentals and on getting the team trained. "As a change management story," says Perkovic, "it's very important to take this process step by step, to have strong communication in place, and to ensure follow-through."

Results

Both Brettschneider and Perkovic explicitly praised Engagedly's excellent customer service, and Kimlel referred to an especially helpful Engagedly representative.

At BSR, Engagedly has improved employee engagement and sentiment, saved time and money, and allowed the organization to move forward with new initiatives. Brettschneider reported that Engagedly's customization options have proven just as useful as she'd hoped. BSR has been able to tailor the performance template to emphasize specific behaviors and capabilities rather than goals, which is helping to facilitate the organization's performance initiative. Having tailored templates for BSR's role profiles (the organization's analog to departments) makes employee events like promotions significantly easier for her to enter the related information elsewhere. They have also customized surveys, and with Engagedly's functionality, BSR has begun polling employees more frequently: where they were previously using annual engagement surveys, they are now able to survey roughly every two months. Brettschneider reports that this has been helpful in collecting data, and she looks forward to seeing even more analytics offered in future surveys. "Our ability to have continuous feedback, to have continuous surveys, has enabled us to have a better insight into the employee experience, which is a huge focus for my team right now." They are shifting away from traditional HR and focusing on the employee experience. "It's been crucial to have this ability to collect feedback." They are also able

Perkovic reports that Convergent Media is still in the early stages of implementation. In August 2021, they collected all the data into their main ERP system, which they will then connect to Engagedly—fortunately, the two systems do interface. The next step was to upload all performance management entries based on OKR methodology, which Convergent finished doing about a month later. For related training, Perkovic's team began refreshing staff on OKR methodology the first week of October 2021. The following week, to teach employees how to utilize the system fully, her team began collaborating



We are very satisfied with the support of Engagedly's team. I'm so thankful that I have their support and help in every action.

Diona Perkovic

Senior People and Culture
Business Partner
Convergent Media Group

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Diona Perkovic, senior people and culture business partner, expects that Engagedly will be highly effective when it comes to Convergent Media's usage of OKR methodology, offering full visibility on the status of goals and key results. The single platform will help the company reduce both human error and the time needed for follow-through on performance management.

to use Engagedly to collect feedback from their member businesses—a good indicator of member relations.

Employee feedback at BSR has been very positive. Employees have shared that they believe they're being listened to. Brettschneider credits the Engagedly survey tool, and new hires praise the learning feature. She likes that they've been able to customize learning modules and integrate training from other providers, so the training is centralized in one LMS.

Overall, the results are great. As noted, Brettschneider says the return indeed aligns with the projections she had listed in her business case. "We're saving so much money, and that really helped us last year. It helped put us in a better position to keep staff. We didn't have to let anyone go last year." She says that for every new hire, what previously took one hour is now taking ten minutes. Combine that 50-minute savings across 50 new hires and 30 terminations so far this year, and the time savings add up to 67 hours, more than a week and a half.

At Convergent, Perkovic reports that she has been "very satisfied with the support of the Engagedly team," which has always provided her prompt answers to any questions. She expects that Engagedly will be highly effective when it comes to Convergent's usage of OKR methodology, offering full visibility on the status of goals and key results. The single platform will help the company reduce both human error and the time needed for follow-through on performance management. Perkovic also anticipates that Engagedly will increase Convergent's employee satisfaction rate, which in turn should strengthen organizational culture and decrease attrition. Cutting time spent on administrative tasks will allow for more time to be spent with clients (which should increase profits) and on strategic projects. Even in the early stages of implementation, Perkovic is already seeing time savings just because they can track performance reviews more easily.

At Essex Bank, Kimlel has already seen the impact of the new coaching opportunities Engagedly has provided. He says that with the new platform, Essex Bank has been able to "set new associates on the right path, without having to wait a year." The opportunity to intervene with poor performers early on means the employer can help prevent eventual termination. Reviews are happening in a more timely fashion, which is good for audits. The notes section

that allows managers to store all information about each associate in the cloud and access it while writing performance reviews wasn't a major factor in the decision, but has proved very useful. Turnover ratings have improved, another key audit item; they believe that's

At Essex Bank, turnover ratings have improved, another key audit item; they believe that's correlated to the timely reviews.



Engagedly really shone as an easy platform. It was an easy sell to executives and senior staff, who were all interested in fixing the same problems.

Justin Kimlel

HR Specialist
Essex Bank

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correlated to the timely reviews. Single sign-on with Engagedly has motivated employees to use the system more, improving employee engagement. As an added bonus, it turned out that Engagedly included services Essex Bank planned to improve in the company's own intranet, thereby precluding further investment.

Each customer featured here has already seen time savings, as well as less tangible advantages which have translated to big-picture benefits like improved employer culture, better talent retention, and more time dedicated to strategy. 3Sixty Insights believes Engagedly's focused area of expertise within the context of HCM is the driving factor behind these success stories.

Kimlel's team is saving roughly 20 hours a week simply because Engagedly enables employees and managers to track review status. Those questions no longer need to be addressed to HR. It's now possible for just one person (Kimlel himself) to be responsible for all performance management tasks, whereas before it was an all-hands-on-deck situation. The time he does spend discussing the platform with colleagues tends to be more forward-thinking; he mostly gets questions about finding new ways to use Engagedly tools for even better results, not about solving problems it's created.

Conclusion

All three representatives believe their organizations made the right decision going with the specialized Engagedly rather than a generalist for their critical performance management functions. This sentiment is in keeping with the idea driving one of 3Sixty Insights' areas of exploration for 2021—i.e., given the idiosyncrasies evident in one organization to the next, demand for exceptionally capable point solutions for key areas of HCM (and the enterprise, for that matter) will persist ([3Sixty Insights BWSAG20101 - Research Agenda 2021: Human Capital Management, October 2020](#)). Engagedly is an illustrative example of this dynamic. Each customer featured here has already seen time savings, as well as less tangible advantages which have translated to big-picture benefits like improved employer culture, better talent retention, and more time dedicated to strategy ([3Sixty Insights BWSRN2142 - Concrete vs Abstract HCM The Power of "And", April 2021](#)). 3Sixty Insights believes Engagedly's focused area of expertise within the context of HCM is the driving factor behind these success stories. Take it from the representatives themselves: Perkovic says, "Engagedly has been a real supporter, and I'm so thankful that I have their support and help in every action," and Brettschneider says, "It really is such a flexible tool that I've been able to make it work for my organization. And it's been very helpful for me."

3Sixty Insights Inc. Navigating the Information Technology Buying Process.

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Gaining Perspective

In selecting Engagedly's specialized approach to solve for performance management and related activities affecting the employee experience, the decisions these users have made support arguments that say the need for point solutions is as urgent as ever. Moreover, idiosyncrasies between employers across industries strongly suggest that demand for exceptionally adaptable and capable functionality for key objectives in HCM (and the enterprise) is evergreen.