

SurePeople Platform — Increasing Employee Engagement through Root Cause Analysis

SurePeople

Best Advance in Employee Engagement Technology

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Company Background



Company-at-a-Glance	
Headquarters	Arlington Heights, IL (USA)
Year Founded	2015
Revenue	Confidential
Employees	26
Global Scale (Regions that you operate in or provide services to)	SurePeople has customers in North America, South America, Europe and Australasia.
Customers/Output, etc. (Key customers and services offered)	Key customers using SurePeople’s platform include Johns Hopkins Medicine, Boston Children’s Hospital, Vertex Pharmaceuticals, American Hospital Association, iRobot (Amazon), Texas Rangers (MLB), St. Louis Cardinals (MLB), Sirtex Medical, UMass Boston’s Center for Collaborative Leadership and Greenlight BioSciences
Industry	HCM/HR Tech/Work Tech
Website	www.surepeople.com

Value Proposition

SurePeople's cloud-based platform is used by a wide range of organizations to increase employee engagement and optimize the workforce to meet the demands of the new world of work. These client organizations include Johns Hopkins Medicine, Boston Children's Hospital, iRobot (Amazon), Vertex Pharmaceuticals, UMass Boston's Center for Collaborative Leadership, the Texas Rangers (Major League Baseball Team), the St. Louis Cardinals (Major League Baseball Team), Greenlight BioSciences and the American Hospital Association, among others.

Specifically – through the platform's integrated WorkforceX employee experience survey and the Prism psychometric assessment technologies – HR and team leaders can (1) more effectively identify the precise root cause drivers of critical workforce challenges such as burnout, turnover and disengagement, and (2) address these root causes through prescriptive development solutions, personalized digital learning and online coaching tools — all available to leaders and employees on platform and in the flow of work.

To deliver root cause analyses for HR and/or team leaders, the platform synthesizes and correlates WorkforceX employee experience survey data (about how people feel), Prism psychometric data (about who people are), and other people data through API integration with HRIS. As a result of these data-driven insights, leaders can prioritize and make targeted interventions to increase engagement at the individual, team, business unit and/or enterprise level, where it matters most.

SurePeople's solution addresses several major challenges and business needs. First, measuring employee experience and improving engagement are top priorities for HR and business leaders today. Major disruptions over the past few years — including the pandemic, remote/hybrid work, the "Great Resignation," and the need for greater work/life flexibility — have had a profound impact on the experience of every employee.

According to many industry analysts, however, legacy approaches and "one-size-fits-all" employee engagement and development initiatives have largely failed to deliver expected business outcomes – nor have these approaches significantly increased employee retention in the current environment.

By connecting employee experience survey data and psychometric assessments with precision actions and enabling technology, SurePeople's solution provides organizations with a more modernized approach to workforce measurement and personalized talent development processes that measurably enhance employee engagement, retention and productivity.

Boston Children's Hospital, for example, has successfully used SurePeople's platform to synthesize and correlate employee engagement survey data, Prism psychometrics and

360-degree competency data to achieve precision insights and accelerate targeted development actions in support of mission-critical employees. As a result, the hospital was able to reduce voluntary turnover by 2.2% and saved \$2.5 million from an increase in retention of key talent.

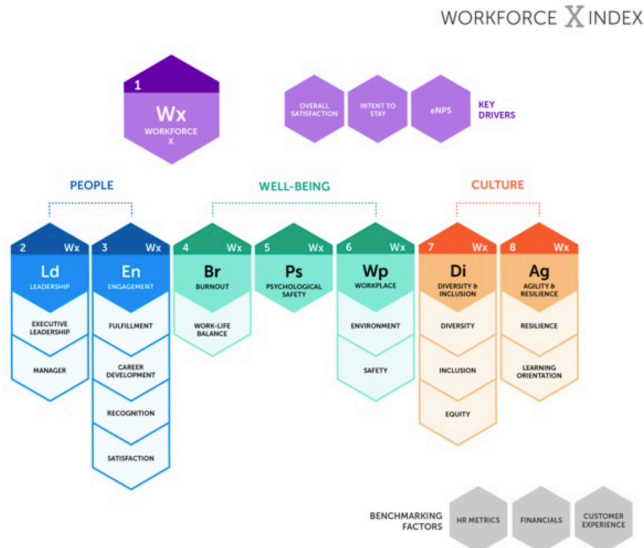
Lisa DeAngelis, Ph.D., Director of UMass Boston’s Center for Collaborative Leadership, adds: “It’s not just the fact that there is this powerful Prism assessment and employee experience survey. Rather, it’s that these technologies are in a platform that enables you to use them and take action in a variety of ways. This is a huge differentiator from the other tools that I’ve used in the marketplace.”

Product or Program Innovation

SurePeople’s primary breakthrough innovation includes (1) the ability to collect, synthesize and correlate critical data sets — such as employee experience survey data and Prism psychometric data — to reveal the root cause issues impacting employee engagement and (2) delivering targeted prescriptive development solutions based on these data-driven insights, for all three levels of the “system” simultaneously: namely, individual employees; teams/business units; and, the HR function (including Organizational Development, Talent and Learning & Development groups).

First, SurePeople’s WorkforceX employee experience survey gives HR and business leaders a comprehensive understanding of workforce sentiment across key indices critical in the new world of work. These include employee sentiment about leadership (including executive leadership and managers), employee engagement (including satisfaction and career development), burnout (including work-life balance), psychological safety, workplace (including workplace safety), diversity & inclusion (including equity) and agility & resilience (including learning).

Visual Below: Indices included in the WorkforceX employee experience survey.



Next, the platform’s integrated Prism psychometric assessment measures 54 key traits and attributes across an individual employee’s Personality & Personality Under Pressure; Processing; Decision Making; Motivation; Conflict Management; and Fundamental Needs.

For employees, this psychometric “portrait” delivers practical, actionable insights that drive self-awareness and guide personal & professional growth. Based on an individual’s Prism results, an algorithm automates prescriptive development recommendations and curates associated learning content and programs, including from top SurePeople content partners, such as Harvard Business Publishing. Employees can also build Action Plans (individual development plans) on platform.

Visuals Below: (Fig. 1) Partial screenshot of the employee dashboard featuring the Prism psychometric portrait. (Fig. 2) Prism reports are easy-to-interpret and actionable. The platform offers employees personalized content & programs; an Emotional, Relational and Team intelligence competency model; and an individual development plan.

Prism® Portrait
Your Prism Portrait reveals comprehensive insights into nearly every aspect of you. This personally relevant data is key for developing a deeper understanding of yourself. When used as a tool for achieving personal and professional success, this data is truly transformative.

Complete Portrait | Graphs Only

PRIMARY PERSONALITY | PERSONALITY UNDER PRESSURE | PROCESSING | DECISION MAKING | CONFLICT MANAGEMENT | MOTIVATION | FUNDAMENTAL NEEDS

POWERFUL | **VERSATILE**
Big Picture | Relation Oriented
Mission Oriented | Detail Oriented
PRECISE | **ADAPTABLE**

NAVIGATOR
SurePeople four dimension personality type: Powerful/Precision
The SurePeople Primary Personality Portrait describes how we present ourselves to others, as well as how others perceive us, in non-stressful situations.
Overview of the Personality

SUMMARY
As a Navigator, Andy may not always be fully aware of how strongly others perceive their personality. Individuals with the Navigator personality type tend to exhibit seemingly opposing strengths.
In their drive to achieve a desired outcome, Navigators can be both aggressive and sensitive, requiring tangible results and perfection but also wanting to explore all possible options before arriving at a conclusive decision. With a strong task orientation and considerable planning abilities, Navigators typically implement sound changes and processes.
Though Navigators might not realize it, they can sometimes prioritize projects and tasks over personal relationships. Andy may not give team members the attention needed to keep the group on the same page, especially when implementing change. Andy may also prioritize freedom to explore and re-check decisions, in the process projecting an aloofness or bluntness that creates distance from work colleagues.

INTERNAL TRAITS
WORK ENVIRONMENT CONTRIBUTION: Capable of improving efficiency and achieving results by initiating change within an organization. Has great potential for vision and the synthesis of facts, events and concepts in order to develop long-range strategies.
EMOTIONAL POSTURE: May be restrained in expression and is willing to accept aggression.
MOBILITY PREFERENCE: Prefers a mix of being mobile and stationary.
OVER-USES: May appear blunt, critical, aloof or condescending.
WHEN PRESSURED

Chris Newell, Ph.D., Senior Director of Learning and Development at Boston Children’s Hospital observes: “I’ve been schooled in assessment tools in 30 years of doing this work. The Prism psychometric assessment was the first time I was able to see six comprehensive assessments that were informing each other, in one place. The complete Prism “portrait” is a kind of “3D view” of the whole person that I cannot easily get with any other assessment.”

Team (and/or business unit) leaders can also accelerate their understanding of their teams via their individual and aggregate Prism psychometric profiles. Digital coaching and online collaboration tools — such as Relationship Advisor and Team Advisor (see visual

below) — help leaders and managers improve team communication, build psychological safety, strengthen relationships and increase engagement.

Visual Below: Partial screenshot of the “Relationship Advisor” tool for two colleagues, “Andy” and “Brandon.” Relationship Advisor provides practical coaching and collaboration recommendations (in the flow of work), based on each individual’s Prism psychometric data. The Team Advisor tool allows the same for teams or larger cohorts.

PRIMARY PERSONALITY (NAVIGATOR)	PERSONALITY UNDER PRESSURE (VISIONARY)	PRIMARY PERSONALITY (SCIENTIST)	PERSONALITY UNDER PRESSURE (ARCHITECT)
<p>Andy can be both assertive and sensitive when trying to achieve a desired outcome. As a Navigator, Andy desires tangible results and implements sound, procedural methods to attain them. Navigators like to implement practical changes and have the ability to plan considerably. Andy is naturally cautious, which proves beneficial when exploring and analyzing decisions and works well when given a certain measure of freedom to do so.</p> <p>ANDY SHOULD MAKE AN EFFORT TO:</p> <ul style="list-style-type: none"> • Be less controlling and give Brandon freedom and space • Express admiration for Brandon’s accomplishments • Strive for win-win situations • Be open-minded and less insistent on having things a certain way • Realize that being both quick and slow to make decisions frustrates Brandon • Take calculated risks and make quicker decisions • Speak in terms of goals and objectives • Let Brandon lead tasks and projects that are important to him • Show appreciation for Brandon’s commitment to get things done • Realize that Brandon may feel Andy is bogging down the process with unnecessary details <p>ANDY SHOULD AVOID:</p> <ul style="list-style-type: none"> • Being very territorial • Intimidating or overwhelming Brandon • Getting into power struggles • Thinking that Brandon slows down the process with technicalities or excessive concerns • Perceiving Brandon as pessimistic and unwilling to try new things • Feeling a loss of control when Brandon’s perfectionism slows things down 		<p>Brandon is exceptionally detail-oriented and analytical. As a Scientist, Brandon has a strong need to get things just right and remains highly focused on that goal. Brandon possesses a natural desire to think critically and act based on correctness, accuracy and well-researched facts. This approach has a strong impact on the Scientist’s decision-making process, as they seek accuracy and logic and will explore all possible options before arriving at a conclusive decision. Brandon has a very strong task orientation and prefers a peaceful work environment. Additionally, Brandon desires to be conscientious and principled is well-intentioned and can positively impact the work environment.</p> <p>BRANDON SHOULD MAKE AN EFFORT TO:</p> <ul style="list-style-type: none"> • Be aware that details Brandon finds important may not be to Andy • Take calculated risks and make quicker decisions • Be direct and to the point • Agree with Andy’s ideas when possible, encouraging his use of logic • Speak in terms of goals and objectives • Let Andy lead tasks and projects that are important to him • Show appreciation for Andy’s commitment to get things done • Realize that Andy may feel Brandon is bogging down the process with unnecessary details • Be factual and objective, but flexible • Try to understand how Andy might see the situation differently • Affirm the quality of Andy’s work • Offer explanations in a diplomatic manner • Handle criticism objectively • Realize that Andy wants to get things right as well • Focus on excellence, not perfection <p>BRANDON SHOULD</p>	

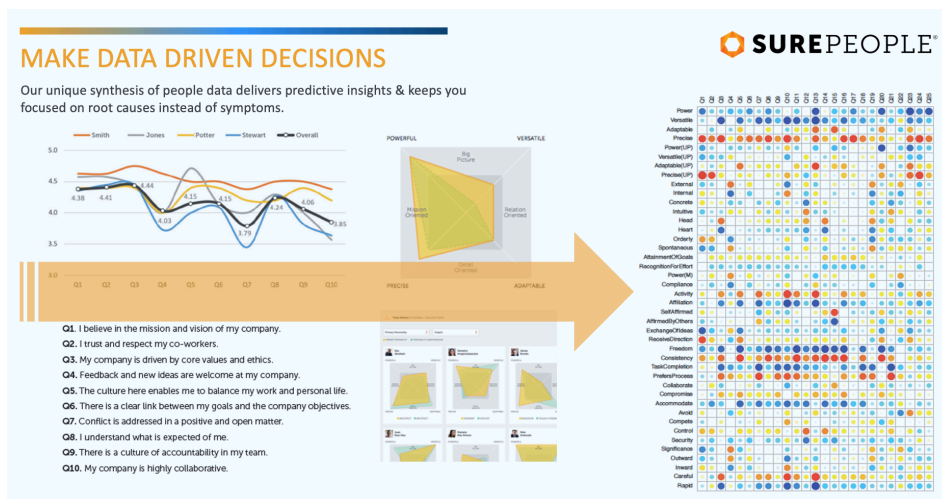
Finally, SurePeople’s proprietary A.I. models synthesize and correlate WorkforceX survey results, Prism psychometric data and other people data to identify the root cause drivers of common workforce challenges, such as turnover, burnout and disengagement.

HR and business leaders receive predictive insights and prescriptive development actions to prioritize interventions at the individual, team, business unit and/or enterprise level.

Unique Differentiators

The SurePeople platform’s unique differentiators include:

1. The ability to combine employee experience data (how people feel), psychometrics (who people are) and additional people data, such as HRIS data;
2. The ability to synthesize and correlate these data sets to reveal root causes, generate predictive insights and help HR and business leaders prioritize targeted interventions where most needed; and,
3. The ability to translate these insights into actionable prescriptive development solutions, personalized content and data-driven online tools for individuals, teams, business units and/or the enterprise — all on platform and at scale.



As a result, SurePeople offers its client organizations an “all-in-one” platform for assessing, developing and optimizing the modern workforce to increase engagement:

- **Assess** — HR and business leaders gain a deeper understanding of their workforce by measuring how people feel (WorkforceX) and who people are (Prism) and addressing root causes rather than treating symptoms.
- **Develop** — The survey and assessment data empower leaders, managers and employees at all organizational levels with personalized, science-driven development. The platform’s patented software automates prescriptive development recommendations based on individuals’ unique Prism results and curates premium learning content and programs, including from world-class content partners such as Harvard Business Publishing. Further, the platform’s data-driven leadership development journeys include an integrated Emotional, Relational and Team intelligence (“ERT-i”) behavioral model — a critical set of leadership behaviors and capabilities proven to decrease turnover, reduce burnout and improve employee satisfaction.

- **Optimize** — Finally, HR and team leaders are equipped with a complete “toolkit” for managing in-house, remote and hybrid teams to increase engagement. Leaders accelerate their understanding of their teams via their individual and aggregate Prism psychometric profiles. Digital coaching and collaboration tools – such as Relationship Advisor and Team Advisor (see screenshots in Product Innovation section) – help managers improve communication, build psychological safety, increase engagement and improve team productivity.

Chris Newell, Ph.D., Senior Director of Learning and Development at Boston Children’s Hospital confirms: “I can go to a team that has taken Prism and immediately have conversations about the makeup of that team, including the team’s strengths and blind spots, how balanced or unbalanced that team is and how to optimize that team’s composition or development for performance.”

Measurable Result

SurePeople’s platform has driven some of the following business outcomes for clients across numerous industries:

- Boston Children’s Hospital has used SurePeople’s platform to successfully synthesize and correlate employee engagement survey data, Prism psychometrics and 360-degree competency data to achieve precision insights, increase engagement and accelerate development actions in support of mission-critical employees:
 - As a result, the hospital reduced voluntary turnover by 2.2% and saved \$2.5 million from an increase in retention of key employees.
 - The hospital also saw a 115% increase in employee engagement survey participation and cut survey data analytics cycle-time by two-thirds with SurePeople’s platform, significantly reducing outside consultant fees.
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- A global medical devices company utilized SurePeople’s platform to assess, develop and optimize its workforce:
 - Working with HR leadership, the employee experience survey focused on measuring employee sentiment around leadership, engagement, culture and diversity & inclusion. Most recently, the company achieved a 96% employee participation rate, its highest ever.
 - Prism psychometric data was mapped to engagement and performance data. Data-driven insights informed 1-on-1s and larger team-building sessions. These sessions were so impactful, the company today administers the Prism psychometric assessment to all new hires globally.
 - eNPS moved up by 20 points.

A Fortune 50 company used the Prism psychometric assessment and survey data to help new Directors accelerate the understanding of their team, increase leadership effectiveness and enhance team productivity:

- As a result, the company achieved a 50% reduction in onboarding and time-to-productivity cycle time for Directors, from an average one year to four to six months.
- Some 82% of Directors reported increased levels of self-awareness and emotional intelligence and a 51% increase in confidence to assess the talent of their teams.

About Brandon Hall Group

With more than 10,000 clients globally and 30 years of delivering world-class research and advisory services, Brandon Hall Group is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.



ORGANIZATIONAL EXCELLENCE CERTIFICATION PROGRAM

recognizes world-class HCM programs that transform their organization and achieve breakthrough results. This designation is the next step beyond the HCM Excellence Awards, which focus on a single program, and looks at the department as a whole.

SMARTCHOICE® PREFERRED PROVIDER PROGRAM

uniquely places HCM service and technology companies at the top of organizations' consideration list of vendors. It adds an unmatched level of credibility based on BHG's twenty-eight-plus years of experience in evaluating and selecting the best solution providers for leading organizations around the world.