



I'm Puzzled!

Unlocking Engagement: Creating an Exceptional Employee Experience

Emcee: Jessica Wobick

Panel Speakers: Christine Brown, Jonathan Davey, Cherie Hendrix, Akeem Davis

September 20, 2023

Company Overview

Wilson Albers, an Alera Group Company, is just one of 180+ nationally recognized firms across the United States. Our industry-leading professionals specialize in Employee Benefits, Human Resources, Retirement Plans, Wealth Management, and Property & Casualty. We bring together the resources, technical knowledge, and best practices of a large national firm, with the personalized attention and local relationships you expect from a top-tier service provider.

Our innovative culture and national partnerships enable us to meet your unique needs and provide you with the best possible solutions. Through our years of service, we have garnered a reputation for delivering exceptional value to our clients. We take pride in being reliable, agile, and responsive, consistently delivering top-notch HR solutions that make a tangible impact on businesses.



Agenda

	ITEM	SPEAKER	TIME
1	Introduction – Panel of Industry Specialists	Jessica Wobick	2:02pm
2	What Is Employee Engagement & Why Is It Important?	Jessica Wobick	2:05pm
3	Effective Engagement Strategy Implementation	Jessica Wobick	2:07pm
4	The 7 Stages of the Employee Life Cycle & Strategies for Designing an Exceptional Employee Experience	Jonathan Davey	2:10pm
5	Empower Performance Utilizing an Employee Experience Blueprint	Jessica Wobick	2:15pm
6	Panel Discussions	Christine Brown Jonathan Davey Cherie Hendrix Akeem Davis	2:20pm
7	Conclusion	Jessica Wobick	2:55pm
8	Q&A	All	3:00pm

Panel of Industry Specialists



Jessica Wobick
Manager of HR Services

- Leads our HR services team in strategy, guidance and account management
- Strong knowledge & capabilities of Strategic Management, HRIS systems and talent management
- Society for Human Resource Management Certified Professional (SHRM-CP®) & Professional Human Resources (PHR®) certifications



Christine Brown
Lead Recruiter

- Strong knowledge in recruiting, staffing in large organizations, talent management & acquisition, training & development, employee engagement
- Helps develop plans for success
- SHRM Certified Professional
- Active and regular volunteer in her community



Jonathan Davey
Sr. HR Services Partner &
Lead Engagement
Consultant

- Implements solutions to create efficiencies & increase productivity
- SHRM Certified Professional & Gallup Certified Strengths Coach and a Conflict Dynamics Profile Certified Facilitator
- Emphasis in workplace culture and employee engagement



Cherie Hendrix
Lead Employee Benefits Sr.
Consultant, National Accounts

- Leads our teams for large groups and self-funded plans in benefits program strategy, healthcare reform guidance, financial analysis, and account management.
- Certified as an Advanced Specialist for self-funded plans by the National Association of Health Underwriters
- Holds life and disability insurance licenses in several states



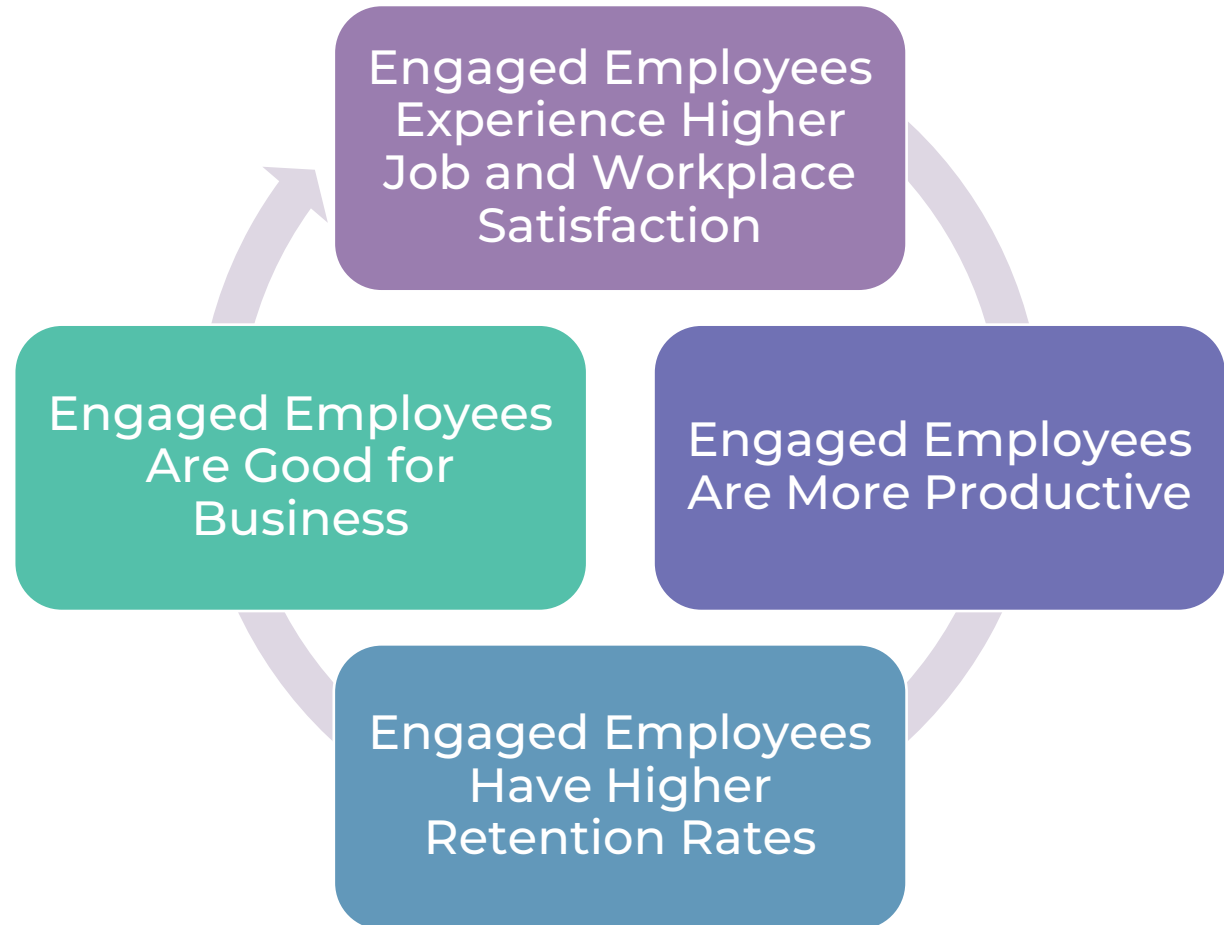
Akeem Davis
Employer Services Advisor and
Retirement Plan & Wealth
Management Investment
Strategist

- Helps to enhance benefits offerings for Wilson Albers' clients
- Strong financial background to help develop more efficient employer strategies
- Former Investment Consulting Analyst & Strategist
- Holds a Series 7 & 66, life and disability insurance licenses

What is Employee Engagement and Why is it Important?

“Employee engagement refers to the degree to which employees are invested in, motivated by and passionate about the work they do and the company for which they work.”

-Paychex, 2023 Status of HR Report

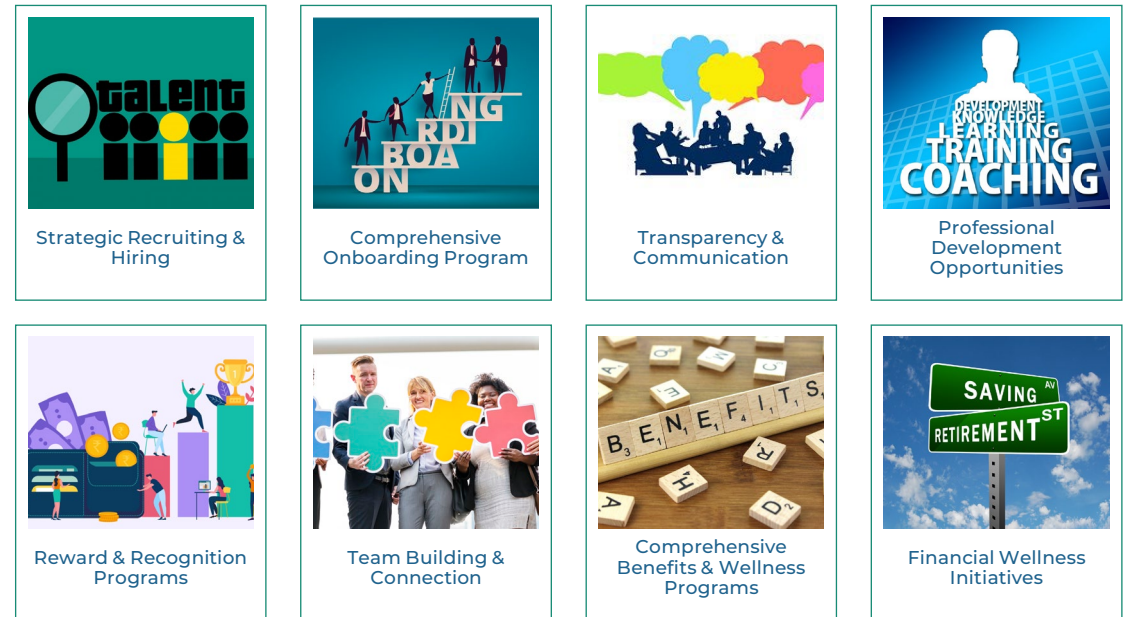


Effective Engagement Strategy Implementation

Develop Your Engagement Strategy



Employee Engagement Best Practices



The 7 Stages of the Employee Life Cycle & Strategies for Designing an Exceptional Employee Experience



Stage 1 - Attract

Cultivate an alluring, talent-centric culture and compelling employer brand which can be showcased on your career page for target audience appeal



Stage 2 - Recruit / Hire

Identify your recruiting strategy, ideal candidate profiles and establish an inclusive and equitable selection process that will build cohesive teams



Stage 3 - Onboard

Establish a clear and understandable onboarding process and provide continuous support from signing throughout the onboarding period



Stage 4 - Engage

Cultivate an inclusive, purpose-driven company culture where employees feel like they are valued and can be themselves



Stage 5 - Perform

Provide employees with regular, informal feedback on their work as well as frequent praise and recognition for exemplary work



Stage 6 - Develop

Collaborate with employees to create development plans aligned with individual and business needs



Stage 7 - Offboard

Cultivate a thriving alumni network by facilitating ongoing communication with departing employees

Empower Performance Utilizing an Employee Experience Blueprint

Utilize an Employee Experience Blueprint to Optimize Individual and Team Success Across the Employee Experience Path



Panel Discussions

The Employee Journey

Meet Taylor

Candidate/Employee Information

- Name: Taylor Williams
- Age: 24
- Job Title: IT Analyst
- Taylor is a talented and dedicated IT Analyst, early in their career and enthusiastic about learning and growing in the IT field.

Needs and Challenges

- Taylor values a company that offers professional growth opportunities and seeks clarity on career development available within the company, including mentorship, training, and potential paths for growth.
- Taylor is now actively exploring job opportunities in other organizations to find a workplace that aligns more closely with their values, fosters inclusivity, and offers significant development prospects.
- Taylor's early career status may require additional guidance and support to identify and pursue the right opportunities for growth and development.



Meet Michael

Candidate/Employee Information

- Name: Michael Campbell
- Age: 35
- Job Title: Sr. Finance Analyst
- Michael is interested in exploring various development programs, mentorship opportunities, or specialized training to enhance his skills and propel his career forward.

Needs and Challenges

- Over the past few months, Michael has been experiencing a declining sense of engagement, primarily stemming from what he perceives as a deficiency in development planning and conversations regarding his career progression. He is now considering different options and recognizes his capability to excel in diverse pathways. He's observed that numerous job postings specify requirements that surpass his already accomplished achievements
- He's interested in having a discussion with his manager regarding his career aspirations and the path for growth within the organization. However, his manager's schedule seldom allows for meetings, let alone conversations about professional advancement, and this has been a consistent concern ever since he began in his current role.
- For now, he'll continue to show up and do what is expected but he isn't satisfied.



Meet Jennifer

Candidate/Employee Information

- Name: Jennifer Garcia
- Age: 43
- Job Title: Project Manager
- Jennifer is committed to maintaining a successful career while also balancing the responsibilities of being a new mother. She values her job and the opportunities it provides, and she hopes to find a workplace that supports her as she enters this new phase of her life.

Needs and Challenges:

- As she prepares for the arrival of her baby, Jennifer is eager to understand the various healthcare and family-related benefits her employer offers.
 - Benefits specific to cover prenatal care and testing for mothers of advanced age, childbirth, and postnatal support for both her and her baby.
 - Maternity and parental leave policies, as well as any flexible work arrangements that would allow her to balance her career and family responsibilities effectively.
 - Childcare benefits, such as on-site daycare facilities or assistance with daycare costs, to ease the transition back to work after her maternity leave.
 - She would like to understand the process of adding her new child to the company's health insurance plan and any other dependent-related benefits available.



Meet Susan

Candidate/Employee Information

- Name: Susan Johnson
- Age: 58
- Job Title: Marketing Specialist
- Susan has recently landed a mid-level marketing position in a reputable company after taking several years off to focus on her family. She is excited about the opportunity to restart her career and hopes to excel in her new role.

Needs and Challenges

- Susan's absence from the workforce has left her unsure of her financial situation. She is seeking guidance on how to optimize her retirement savings and make the most of her current income to prepare for her retirement.
- Susan is concerned about understanding the risks associated with different investment choices and how to balance her portfolio effectively.



Conclusion



At Wilson Albers, we excel at seamlessly integrating the vital components of recruiting expertise, comprehensive HR services, personalized employee benefits and retirement planning solutions. This intricate interconnection creates an extraordinary and unified journey for your organization's employee experience.

We are dedicated to delivering precision and meticulous attention to detail, leading to cohesion amongst every element. This dedication paves the way for heightened performance, unparalleled productivity, and a workforce that is profoundly committed and engaged.

Q&A



Contact

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