CASE STUDY: UKG AND MARKETSOURCE

Better Employee Experience from a Modern Workforce Management Platform

How UKG Dimensions’ Open API Platform Approach Enabled Higher User Productivity and a Better User Experience

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# TABLE OF CONTENTS

At a Glance .................................................................................................................. 3

The Company .............................................................................................................. 4

The Challenges ............................................................................................................ 5

The Solution ................................................................................................................ 6

The Impact ................................................................................................................... 9

The Takeaways .......................................................................................................... 11

The Recommendations ............................................................................................. 12

Related Research ...................................................................................................... 15

Analyst Bio. ................................................................................................................ 16

About Constellation Research .................................................................................... 17
MarketSource provides expert services for its clients across retail locations in North America. The workforce is employed and managed by MarketSource directly while acting as an extension of a retailer or manufacturers in retail. Staffing for flexible retail hours and across multiple applications and locations required MarketSource to build a custom mobile app that spanned five key application automation areas.

One prominent automation area is workforce management, for which MarketSource uses the UKG Dimensions product and platform to deploy its custom employee portal to integrate several products and achieve a common user experience for its employees across applications. The result is higher employee productivity and a better employee experience that consequently results in a better customer experience:

**AT A GLANCE**

| Problems | · A unique automation requirement across customers and locations with heavy workforce management demands  
|          | · Lack of a common user experience across five core automation areas  
| Solutions | · Deciding to build a custom mobile application  
|           | · Choosing API-first solutions that were easy to bring together  
|           | · Selecting UKG Workforce Dimensions as a modern cloud and open API platform workforce management solution  
| Benefits  | · Improved workforce retention  
|           | · Reduced talent acquisition costs, with 10% fewer recruiters  

THE COMPANY

MarketSource, an Allegis Group company, takes a unique approach to outsourcing and staff augmentation: It decided to employ its own workforce and manage the employees directly, contrary to a typical outsourcing model that uses contractors managed by leaders at the customer site. Being employed, better trained and better supervised creates a unique experience for MarketSource employees. For instance, they know they may work at different brands and retailers over time or even at the same time, creating a different employee experience, deeper loyalty and higher customer satisfaction.

On the MarketSource employer side, there is a greater investment in training and education and, via direct management supervision, more “skin in the game” to deliver the right success metrics. On the retail side, MarketSource customers enjoy the reduction in complexity for their operations, as well as the differentiation gained from the branded MarketSource services.

The following are two examples of typical MarketSource engagements:

• **A major national retailer’s tech areas staffed by MarketSource employees.** Walk into one of its stores to look for a phone, and sales, service and activation are carried out by MarketSource employees. This retailer’s customers receive competent service, and the retailer does not have to staff and educate employees.

• **A top home appliance brand has remained No. 1 in market share for the last three years, with MarketSource representing the brand.** MarketSource trains all the employees in the home improvement channel on appliances for this key brand. Lowes and The Home Depot employees get well trained, and this major HA company does not have to hire and maintain a trainer workforce.
THE CHALLENGES

MarketSource faced the challenge of operating multiple applications for its employees—applications that fell squarely into the following five categories:

1. **Unified communications.** MarketSource wanted its field employees to have a single source of communication and content for doing their work. Because each of the applications had its own communications capabilities, which would lead to fragmented communication, MarketSource decided to go for a single communication solution for all of its employee relations and communication needs.

2. **Field service management.** A field service management functionality combined with a route-planning capability was essential for MarketSource, because employees and managers schedule visits to multiple locations during their workday. Being efficient at organizing schedules and planning travel was key for sales effectiveness and customer success, so MarketSource integrated a route-planning application.

3. **Electronic form management.** MarketSource knew that it would have dynamic customer requirements for data collection and data storage across its client base. It needed a flexible form tool with embedded logic that would accommodate these requirements.

4. **Training.** MarketSource required a learning and training solution that empowered its employees to learn relevant content and processes, as well as to get certified for their work. None of the integrated training capabilities was good enough, so MarketSource opted for a stand-alone, best-of-breed learning management system.

5. **Workforce management.** At the core of MarketSource’s success is effective workforce planning and scheduling, enabling employees and managers to react swiftly and efficiently to fast-changing resource demands. For this requirement, MarketSource selected UKG Dimensions.
To achieve a superior employee experience, MarketSource decided to build an in-house mobile application, bringing all five automation areas together and building a single-user interface (UI) for its employees. The technological consequence of this decision was that MarketSource had to use applications that would have APIs for all of its critical capabilities so MarketSource employees could use a single system without awareness of the various underlying products.

One primary challenge in MarketSource’s business model is to have employee skill visibility to help managers avoid opening new external job listings by exposing internal skilled employees who can do the work. MarketSource wanted a model similar to the gig economy business model that enables employees to see and select “gigs” on which they want to work. It was this additional requirement that led MarketSource to build an in-house application.

THE SOLUTION

When MarketSource decided to build an in-house mobile application for the needs of its workforce, the company knew that workforce management capabilities would be crucial, so it ran an RFP process that included 29 vendors, along with its incumbent vendor. In the end, MarketSource selected UKG (then Kronos) Dimensions, just when the product became available in 2017. The key decision drivers were UKG’s expertise in retail, workforce management capabilities, a cultural fit and—most importantly for building the in-house application—UKG Dimensions’ open API platform.

Next, MarketSource had to decide on the platform on which to build the in-house application. It was a close race between a UKG partner and a popular customer relationship management platform. The company undertook a proof of concept with both vendors. In the end, the UKG partner won and MarketSource implemented all five solutions in a single mobile application, a process that took about 10 months. The company took an agile approach to building the application, and once it overcame some usual challenges due to scope creep, it was ready to move ahead successfully.

Wisely, MarketSource chose to pilot the new application, engaging a marquee customer for this step to ensure real day-to-day use-requirements testing, as well as brand recognition, to accelerate acceptance for the further internal rollout.
The MarketSource requirements initially proved to be a challenge for the UKG Dimensions product—for example, having to work with more than 35,000 locations and with employees assigned to more than one manager—but UKG worked diligently with the company and expanded the capabilities of the Dimensions product to meet all of MarketSource’s requirements.

Today, MarketSource employees simply download an app to their smartphone (see Figure 1), log in and work within a single UI that provides access to all relevant MarketSource client-company information via a bulletin board and other general communications channels. Employees check in and out for work via UKG Dimensions, which uses a form software product to collect and report

![Figure 1. Route Planning and a schedule example for a MarketSource employee](source: MarketSource)
information and a route-planning product to determine their next location. When they have time or need training, employees access a learning application via the same UI.

At any given time, MarketSource employees do not see or know any of the five underlying applications, which creates a better user experience and enables them to spend less time working with software and more time focusing on the value creation process they are providing MarketSource customers.

On the workforce management side, MarketSource employees not only have basic clock-in and clock-out capability but also have visibility into their schedules and can trade shifts and understand their overall work time as delivered or planned.

Today, MarketSource has been running its unified application (see Figure 2) successfully for more than two years, demonstrating that in-house development is a powerful strategy for achieving a better employee experience—and with that a better customer experience.

“For a truly superior employee experience, enterprises need to align all their applications that span a variety of different products—in our case five—in a single user interface. The result is better employee performance and a better customer experience.”

—Steve Wilson, Executive Director, MarketSource

The Technologies

- In-house mobile application built on UKG partner platform, powered by UKG Dimensions open API platform
- Workforce management, learning, routing, forms management and communications from five vendors
- Single sign-on; single UI for users
THE IMPACT

MarketSource had high hopes and expectations for its new applications, and it was not disappointed. Here are some of the most positive impacts:

• **An improved employee experience and a more engaged workforce.** By accessing them via a single UI, MarketSource employees are more productive when using internal applications and can spend more time on customer-related work. This has led to better customer outcomes, which has motivated the MarketSource workforce and led to better workforce engagement.
• **Reduced turnover.** When MarketSource employees are more successful, they become less likely to seek alternative employment. Moreover, with the new application, they can look for additional income opportunities within MarketSource, further reducing turnover costs.

• **A more informed workforce.** By using one common corporate communications platform that works within MarketSource employees’ day-to-day application, employees are better informed about where the company is heading and what is expected from them.

• **A more qualified workforce.** Thanks to the integrated learning application, employees can address critical learning needs at their leisure from within the same application they already are using. This brings learning content as close as a tap on their smartphones, and employees are taking advantage of this.

• **Improved employee retention.** A more motivated and successful employee base is helping MarketSource reduce workforce fluctuation and allowing for longer employment periods.

• **Reduced talent acquisition costs.** MarketSource was able to reduce the number of necessary recruiters by about 10% while still managing to meet hiring goals. The cost savings in this area alone paid for the creation of the in-house application.

• **Internal success leads to external recognition.** Driven largely by the success of the new application, workforce satisfaction and engagement are trending up year over year.
THE TAKEAWAYS

Lessons Learned

It is clear that, given separate solutions that employees need to use, it is better to bring those solutions together as a single user experience. This is especially true when employees are working in customer-facing environments, and reduction of internal screen time means more time spent with customers and an overall higher employee satisfaction rate.

The consequence is building a custom in-house application and becoming the integrator of the various disparate solutions—in the case of MarketSource, five separate applications. The goal must be that the employees do not even know what the applications in the background are, and the user experience needs to be flawless across the different functional areas, with a focus on expediency and productivity.

Technically this can be achieved only with solutions that offer APIs, and a modern API infrastructure that encompasses the complete solution is key for this strategy to succeed. This was one of the major decision drivers for MarketSource's choice of UKG Dimensions and its open API framework that powers entire business processes in addition to data. No matter what MarketSource needs to use and expose as a workforce management capability from UKG Dimensions, it can do so, because all Dimensions capabilities are accessible via APIs.

ROI

MarketSource has seen many aspects of ROI, the most significant being a reduction in turnover. Being able to reduce the number of recruiters needed to staff MarketSource operations by 10% practically paid for the customer project. Now adding qualitative drivers around a single mobile application in one identical user experience, with better-than-ever streamlined corporate communications, an integrated workforce management system and learning and travel-routing applications, it is clear that MarketSource is seeing payback from the project.
Best Practices

A key best practice for in-house application development is to adopt an agile approach. But agile development stands and falls based on the ability and representation of the project team members. On the one hand, they need to be able to address business requirements that are both valid and applicable; on the other hand, they need to represent the future user population well. It is important that frontline users—as well as their managers—are appropriately represented, so that the in-house solution is an instant success.

Moreover, the typical 80/20 rule applies. Agile projects usually are quick to meet 80% of requirements, but achieving that last 20% often takes as much time as achieving the first 80%. Avoid overly optimistic project status updates and ensure that project efforts are appropriately accounted for.

What to Avoid

When bringing five separate solutions together, downtimes—regardless how short—stack up. Enterprises following an API strategy need to address uptime needs early in the selection cycle and test vendors’ flexibility for scheduling downtimes with the company’s business needs in mind, ideally coordinating planned downtimes across vendors. In MarketSource’s case, for example, it was important to schedule downtime for slow Tuesday afternoons rather than for retail-intensive weekends.

Another area to avoid is having too many partners on the project. Evidently, the room for misunderstandings and finger-pointing increases based on the number of partners involved in the project, so the rule should be to engage as many partners as needed but as few partners as possible.

THE RECOMMENDATIONS

A better employee experience is always a good true north when implementing new systems. The reality is that enterprises face multiple standard software solutions that all come with their own stack, user experience and operational procedures. The result is a “fasten your seatbelt” experience for
employees that relies on human adaptability, ingenuity and desire to work with the separate solutions. The hidden cost of this approach usually is not measured, but it piles up in higher administrative time, lower employee productivity and often less employee engagement. In the worst of cases, employees quit their job if they are not given the tools to succeed.

Specifically, this means that CxOs faced with disparate solutions should consider in-house creation of applications for their workforce. Consider the following strategy steps:

• **Account for the number of disparate solutions.** CxOs should start by looking at the number of applications the members of its workforce need to use in their daily and weekly value creation work. How many separate logins, devices, UIs and so forth are the employees confronted with? The in-house-application creation business case is usually to start with three or more applications.

• **Establish the benefits upside.** Every project needs an ROI, so CxOs must establish what the benefits upside is. Look at both quantitative and (monetized) qualitative benefits. Be realistic when setting the parameters for the project investment.

• **Select modern software vendors.** A meshed in-house application like the one MarketSource created cannot be built on top of antiquated applications. Specifically, this means you need an API strategy that ensures API availability and you need to select an easy-to-use, quick, results-driven declarative platform to tie everything together. Sometimes you may need to update a key application before the project can start, as when MarketSource switched from its incumbent vendor solution to UKG Dimensions.

• **Focus on adaptability.** Nothing is more constant than change, and the number of relevant solutions will fluctuate. This requires adaptable and flexible tools, especially for the platform on which the UI will run and from which API calls are being made. Selecting the right platform is a key success factor for an in-house application strategy.
• **Focus on getting it done fast but right.** Speed is of the essence, especially when the upside is attractive. Business requirements morph over time, so CxOs need to ensure that their project is moving fast enough to catch up to them—while not moving too fast to get things right.

• **Continuously measure.** It is likely that a project will achieve a positive ROI quickly, but that does not absolve CxOs from ruthlessly monitoring the metrics of the project. Measuring usage, success and metrics is a best practice no CxO should ever shy away from.
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