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The Evolving Employee
Communications Landscape

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Are You Ready for Changing Workplace Communications?

In today's world, communicating in the workplace is more challenging than ever. The sheer number of ways to connect and interact with others continues to expand, and that means critical communications from employers can get lost in the shuffle. On top of that, Kollective research shows that approximately half of U.S. workers are dissatisfied with the way their senior management communicates with them. Statistically, that means half of your employees are unhappy with how you share information--a clear demand for a better approach.

From that collection of challenges, a new breed of vendors has arisen to support the communication needs of the workforce. While communications have always been a need for large employers to coordinate information and share resources, this demand is also making its way downstream to smaller employers as well. Instead of relying on a newsletter or bulletin board to reach their employees, companies are turning to purpose-built systems and applications that promise to cut through the noise and create greater engagement with messaging. Usage is common upstream as well, obviously, with companies supporting tens of thousands of workers looking for ways to improve their communications with smarter tools and technology.

This report is our first deep dive into these types of technologies and we'd love to hear from you about how you are using this as a resource to help explore options, make decisions, and improve communications within your own organization.
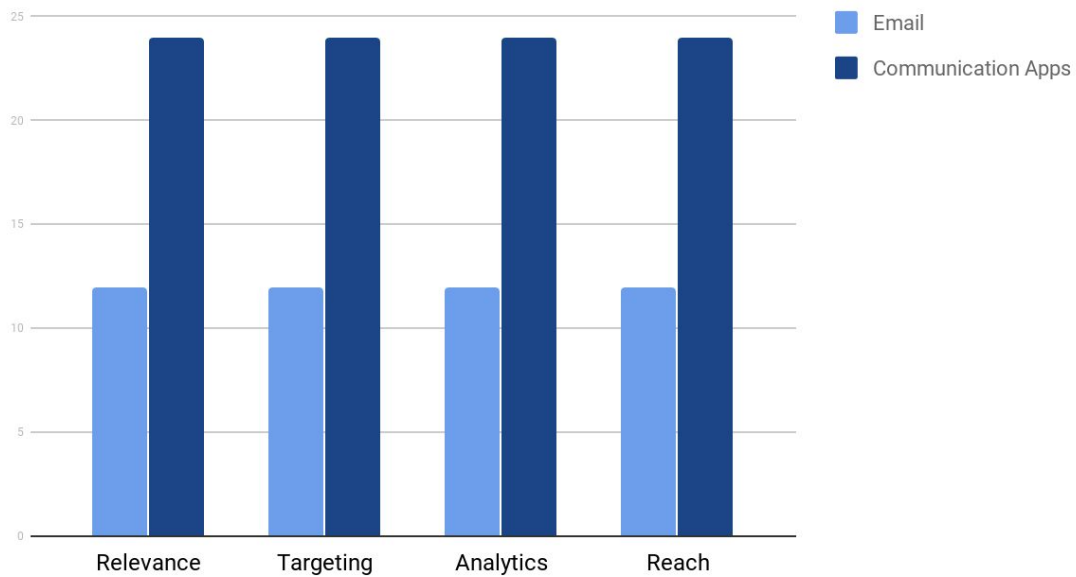
Communicate well,

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Communication on a Spectrum: Email Isn't the Answer

Communications at work happen on a spectrum, but the thing we know is that top-down communications can't rely solely on email as the distribution channel. As the graphic below shows, email's value proposition for corporate communications is inferior when it comes to relevance (right message), targeting (right audience), reach (right time/place), and analytics. Email simply can't match purpose-built technologies for getting the right information to the right people at the right time. The graphic below, offered for illustrative purposes, shows how much more value communication apps can offer.

Value Proposition of Dedicated Communications Platforms

Perhaps most importantly, these systems often include measurement tools to support the analysis of messaging performance. For instance:

- Do you even know if your company's last communication was read?
- If so, what percent of the employee population read it?
- What percentage took action on the information?

Put simply, the number of capabilities is impressive. This isn't "just another communications channel," as some might think. These systems are designed with mobile in mind (or mobile first, in some cases), creating opportunities to interact with employees across the organization. And for those deskless workers that are often forgotten or pushed to the side in terms of technology resourcing, these systems offer a valuable, yet affordable, mechanism for creating better connections.
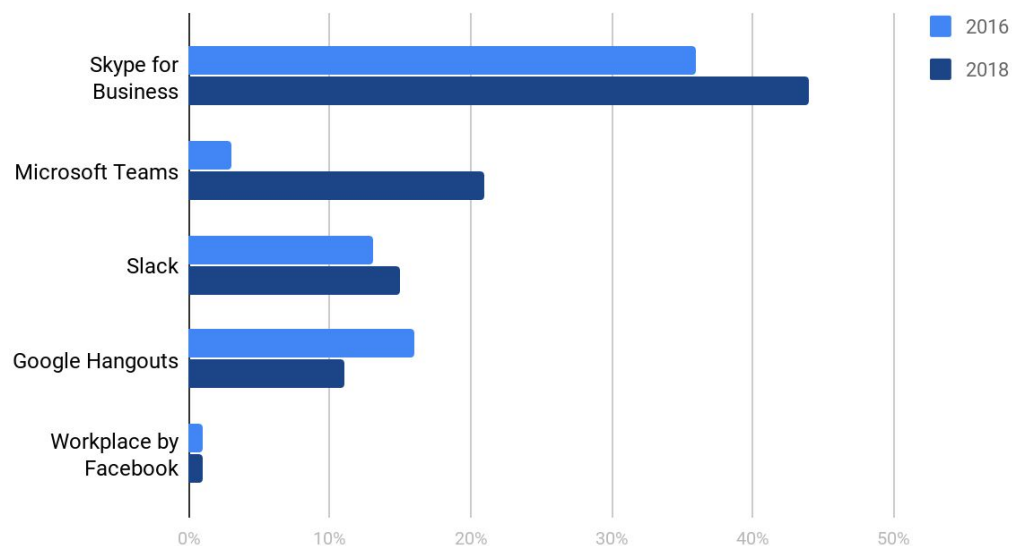
Define: Deskless Workers

Deskless workers are often found in professions and industries where employees are naturally more mobile in the performance of their duties. For example, retail, healthcare, and hospitality are all industries with considerable populations of non-desk workers. The key differentiator is that these workers often do not have computers, and sometimes they don't even have company email addresses to receive information. There has to be a better way to communicate with this significant population of the workforce.

Beyond taking a deep dive into the trends in employee communications, this report will offer a series of profiles highlighting some of the key providers in the industry as well as key strengths of each system. Because we are an independent firm we do not recommend the "best" application, so each will be framed by specific differentiators to help you determine which might be best fit for your needs.

What This List Is Not

There are amazing technologies being delivered today to help workers collaborate. According to a recent report, the ranked list of popular chat applications to support workplace collaboration for office workers include Skype for Business, Microsoft Teams, Slack, Google Hangouts, and lastly, Facebook Workplace. See chart for additional details on adoption of these types of tools.

Adoption of Enterprise Collaboration Tools (Source: Spiceworks)

To be fair, these applications are used by tens of thousands of companies to solve their internal peer-to-peer collaboration needs, but these firms are not the focus of this report. These tools may not **require** a worker to be physically at a desk, but when you look at the industries where adoption is highest, those tend to have higher populations of desk workers (technology, financial services, etc.)

In addition, one of the biggest differences is that the vendors featured in this report are approaching employee communications from a top-down perspective. While some of them have specific features for peer-to-peer collaboration, you'll quickly see that they go beyond the simple chat functionality you can expect from the applications listed above.

Buyer's Guide

The three criteria we looked at when examining systems for inclusion in this guide were fairly simple. The tools needed to be able to:

- **Create communications**: develop messages within the system
- **Send communications**: deliver information to various audiences
- **Measure communications**: determine the reach, impact, and activity of messages

If you're looking for technology to support this, there are several options in the market. Additionally, the following checklist is offered as a basic outline of components you might consider asking asking questions about when evaluating a communications technology provider:

- Doe it have a mobile or app-based interface?
- What platforms is it available for? (iOS, Android, Windows, etc.)
- What capabilities does it have around analytics and measurement?
- What options, if any, are available to support content development?
- Are there tools to support campaign management?
- How can audiences be segmented to reach the right group with the right message?
- Are there any key partnerships or third party integrations worth noting?
- Is the system secure, allowing access only for authorized users?
- Are there options for single sign on or Active Directory integration for ease of use?

While not an exhaustive list, it offers a good starting point for finding the right solution for your business within the broader technology selection process.

For more hands-on selection support and insights, Lighthouse offers advisory support to employers that need an independent industry perspective.

List of Participants

As an independent analyst firm we don't recommend "best" or "only" solutions--we highlight the best each technology has to offer in order to help you make more informed decisions about which fits your own needs best. The following companies are profiled in this report along with some of their key differentiators.

1. GuideSpark
2. BeeKeeper
3. StaffConnect
4. Employee Channel
5. Backstitch
6. AppRise
7. Zinc

Additionally, we considered the following providers but did not receive information in time for publication: *Dynamic Signal, Crew, Snapcomms, Workjam, Red e App, and Speakap*. This is a slice of a bigger market, but it provides a comprehensive look at the latest and greatest you can expect from these types of firms in the industry. If your firm provides technology that matches the demographics in this report please feel free to contact us about inclusion in a future research project.

Conclusion

It is our hope that you walk away from this report not only better informed about the types of technology available, but also the value that they can bring to your ongoing communication needs as an organization. Regardless of your industry, size, and mission, communications are the lifeblood of how the business operates.

It's no longer enough to hope that a "send to all" email is going to communicate the right information effectively. Communications is a strategic enabler that enables employers to serve customers, support employees, and deliver value every day.
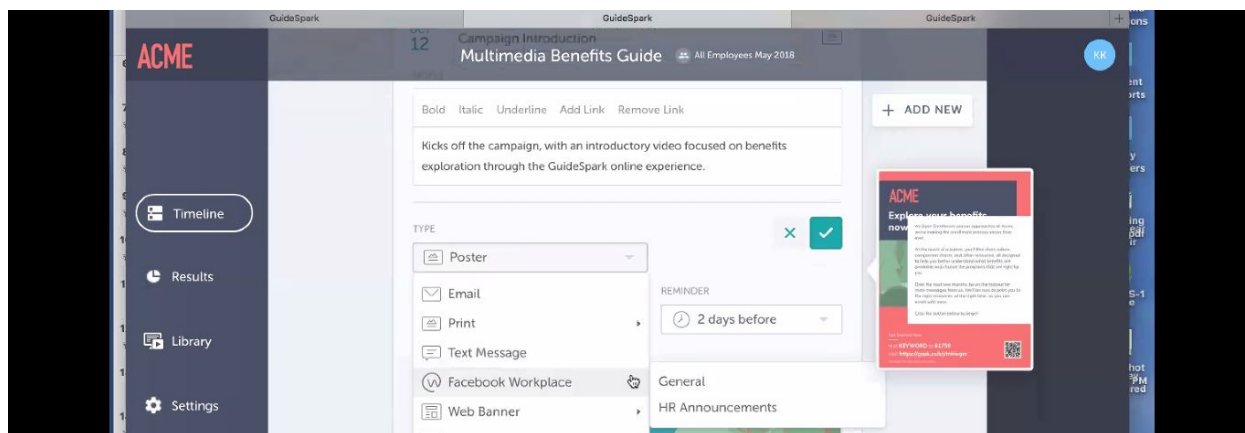
Profile: Guidespark
Founded: 2008
Key Customers: Adobe, Salesforce, eBay, Corning
Website: https://www.guidespark.com/
Tagline: "Create great employee experiences"

Product Screenshot:

Analyst Notes:

I have met with the GuideSpark team several times over the years, and I always walk away feeling like they are improving the professional capabilities of HR and communication leaders with their work. They have an impressive customer list of enterprise firms, and it's apparent why when you dig into the features. The core of Guidespark is Communicate Cloud, a top-down communication solution which enables employers to plan, create, distribute, and measure the reach and impact of employee communications.

The screenshot above is pulled from the Communicate Cloud Campaign tool, which allows users to create a wide variety of employee communication campaigns from stock campaign templates and a variety of media, including everything ranging from simple SMS text messages to high-resolution posters with a few clicks. This is powerful for administrators because they have limited time to create and share these resources, but it's also powerful for their audiences, because they can receive the communications in the channels that matter most to them. Users can easily swap from the message to the web experience and don't have to download anything in order to receive this information, which can sometimes be a barrier to adoption.

The dashboard also shows metrics at a quick glance so administrators can tell if their messages were on point by examining how many engaged with important communications. In short, it's a proven system and a great team behind it. Pricing is per employee, per year for the core system. Additional content experiences and employee journeys are available at tiered rates for firms that want off-the-shelf content for plug and play.

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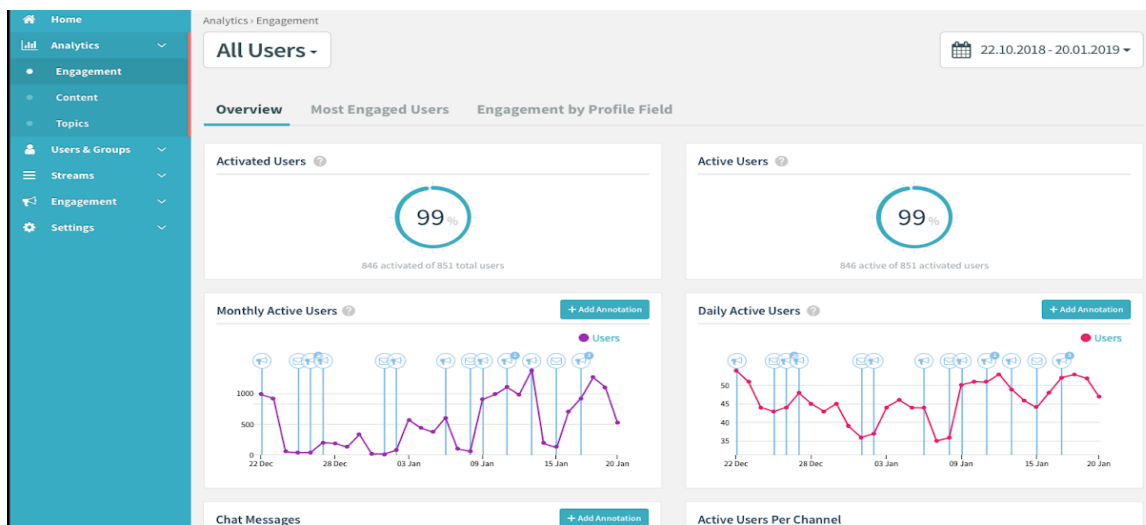research & advisory

Profile: Beekeeper
Founded: 2012
Key Customers: Heathrow Airport, Domino's Pizza,
InterContinental Miami
Website: https://www.beekeeper.io/en
Tagline:"Reach your entire workforce"
Product Screenshot:

Analyst Notes:

I keep hearing about the challenges of deskless workers, and that is a key message for Beekeeper. The company estimates that 80% of the global workforce fits the deskless demographic, meaning the untapped market is unbelievably large for this kind of product.

As a mobile application installed on a personal or company-issued device, Beekeeper is quite robust. One intriguing bit that caught my attention is that the system can integrate with a firm's existing HRIS, comprehending the person's location, workgroup, and other relevant information to target communications to their needs. This allows the company to get around paying for Microsoft Exchange seats for every single person in the company when a chunk of them might not even need to use email for their job, offering a capability most IT leaders would salivate over. Maybe that's why client renewal rates for the platform are currently running at 95+%.

Additionally, users can chat with peers within the system, offering a secure, archivable form of interaction beyond those of standard third-party consumer applications. This peer-based chat can be used for side conversations, announcements delivered via streams ("Maintenance needed at the front desk"), or even recognition purposes to share good news and accomplishments of various staff members on a broader scale.

Pricing is set at a per employee, per month basis.

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Profile: StaffConnect
Founded: 2012
Key Customers: YMCA, Carnoustie Golf Links, several high-profile healthcare organizations
Website: https://www.staffconnectapp.com/
Tagline: Reaching and engaging your entire workforce

StaffConnect

Product Screenshot:

Analyst Notes:

I first chatted with StaffConnect during their 2017 press tour. The company is based in the UK and was releasing its 2.0 features globally. I still remember being impressed with the company's specific approach to adoption with the product:

1. Mobile app as the hub for employee activity
2. Management console for content management, analytics, and moderation
3. App success services wrapped around the implementation to ensure the best roll out and adoption

Speaking of adoption, StaffConnect has Single Sign On capabilities, which means users log into their work account and the system recognizes them from there without having duplicate logins. The mobile application even has capabilities for polls, chat, communities, and events to help drive employee usage.

In 2018 the company expanded from its initial mid-market approach to include enterprise customers (up to 300,000 employees). Additionally, they have been targeting smaller firms (under 1,000) with a structured, prepackaged solution with quite a bit of success.
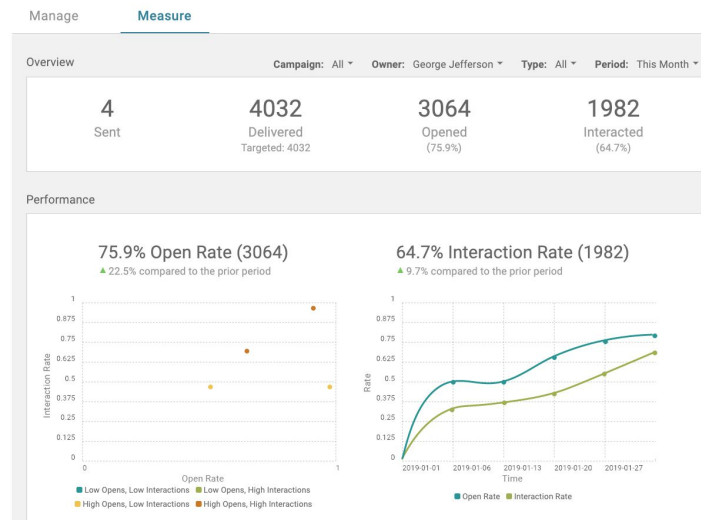
Profile: EmployeeChannel
Founded: 2015
Key Customers: Not Disclosed
Website: https://www.employeechannelinc.com/
Tagline: Leadership Communications for a Modern Workforce
Product Screenshot:

Analyst Notes:

In my discussion with the CEO of EmployeeChannel, I was struck by a phrase he used to describe the company's ideal audience: *the digitally disconnected*. It's a nice way of saying deskless workers, but it brings home how important it is to create lines of communication with this group of workers.

We heard from several companies that they were getting more interest from non HR/communications leaders for help with this internal business problem, but EmployeeChannel was the only one to make this a priority in our conversations. The firm is being approached by CEOs, COOs, CMOs, and even line-of-business leaders in various industries to help improve communications.

The solution includes enterprise messaging, surveys/polls, employee forums, on-demand content and a directory to drive value and engagement at the user level, but the firm also has prioritized content development as well. The approach incorporates natural language processing and machine learning to help coach managers and other content creators on better communication practices. For example: how to write subject lines that actually get read.

An my book, Artificial Intelligence for HR, I talk about the importance of NLP and machine learning in creating scalable applications that impact workers in a positive, personalized way. I'm excited to see what develops out of this approach from the EmployeeChannel team.
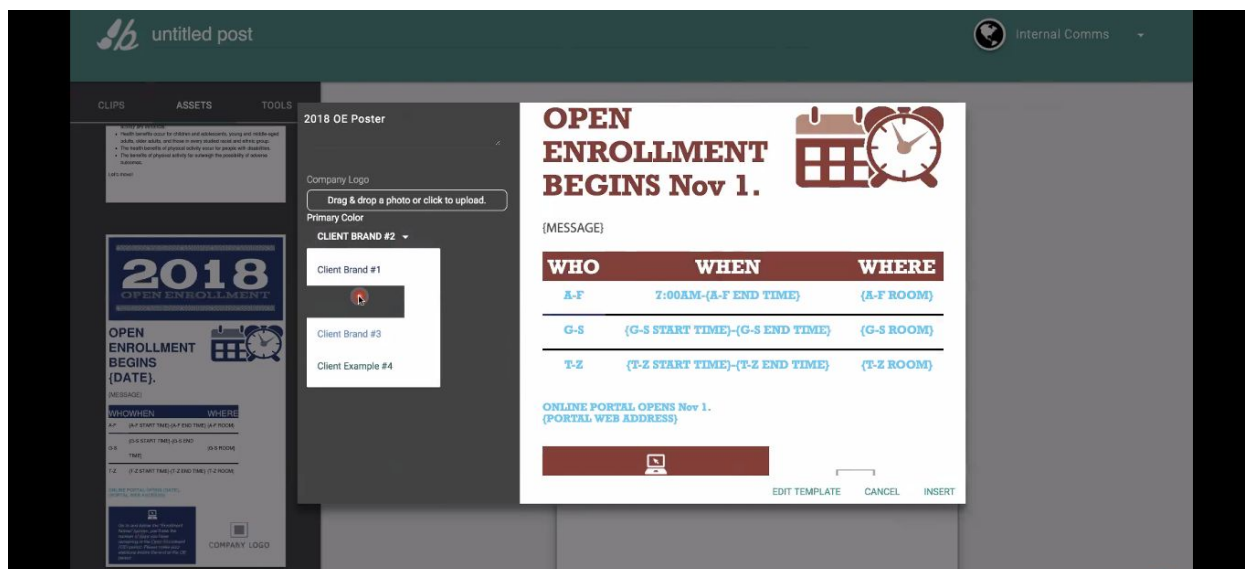
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Profile: Backstitch
Founded: 2012
Key Customers: Not disclosed
Website: https://www.backstitch.io/
Tagline: Communicate with your Employees. Like you talk to your Customers.
Product Screenshot:

Analyst Notes:

Backstitch is a tool designed to reach employees where they are. The system is white labeled, so every employer will have their own custom look and feel based on what they call the platform internally. For top-down communications, employers can use Backstitch Studio to design targeted communications (screenshot above) with an intuitive drag and drop campaign builder.

Some of the interesting points here included GSuite and Outlook integrations for sending communications, if that is the employer's preference for delivery. Additionally, push notifications in the Android and iOS applications can be used, which means employers don't even have to have emails or employee phone numbers to push information to their people. On a peer level, employees can interact socially within the app, offering a dedicated space instead of relying on unsecure third-party applications. Additionally, from the end user perspective, Backstitch Reader is fully white-labeled: each individual company's logo and branding are front and center, as they should be. This creates a more seamless experience when workers receive communications.

Interesting angle: the CEO at Backstitch told me during the briefing that they have also had customers look at non-employee groups for communications, such as spouses (benefits communications) or boomerangs/alumni (ongoing employer branding). This is a highly

competitive practice and one that employers should consider when implementing an application like this.

Profile: APPrise Mobile (TheEMPLOYEEapp)
Founded: 2011
Key Customers: Caesar's Entertainment, Chipotle Mexican Grill, California Pizza Kitchen, AbbVie, Toyota North America
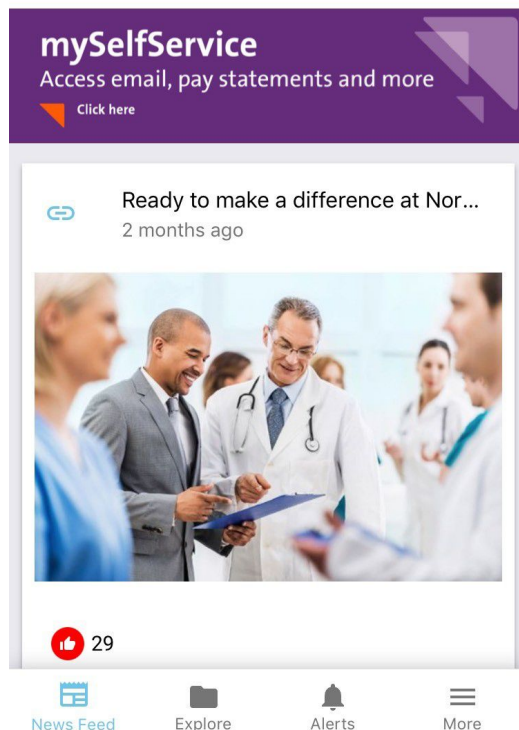**Website**: https://www.theemployeeapp.com
Tagline: "The Employee Communications and Engagement Solution for the Deskless Workforce (and Deskbound too)"
Product Screenshot:

Analyst Notes:

In my years of analyzing HCM technology, I've realized the fact that where a company's founders come from profoundly influences the direction, messaging, and approach of the company. This is especially true for APPrise Mobile, makers of TheEMPLOYEEapp. The CEO and founder came from a corporate communications and public relations background, which reinforces the focus on sharing relevant information with the right audiences at the right times.

One of the key differentiators for TheEMPLOYEEapp is the ability for workers to receive targeted content based on their work location, shift, or position. This might not seem relevant for the average white collar worker, but in retail, healthcare, manufacturing or hospitality, it's common for workers to change some or all of these on a regular basis. By swapping to the relevant profile, workers can see the most relevant, up-to-date information they need at one time.

Companies that prioritize communications have made this application available to their more than one million employees across the globe. Analytics on the platform offer helpful insights, such as key points during the day where app engagement is highest and when to target communication pushes. For instance, one customer saw that break times were ideal for sending new information to ensure it was viewed.

Pricing for the system is an annual subscription based on employee tiers: from 1,000 employees, up to 5,000 employees, or even 100,000+ employees, the system is built for scale.
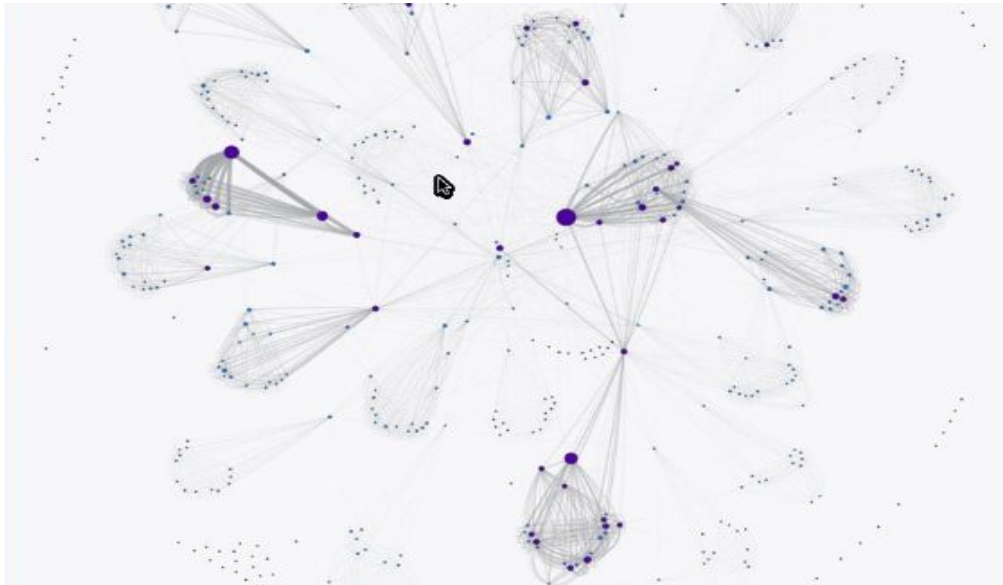
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Profile: Zinc
Founded: 2013
Key Customers: DISH, Hyatt, Synergy Medical Group
Website: https://www.zinc.it/
Tagline: Communication is the answer
Product Screenshot:

Analyst Notes:

My conversation with Zinc was a fun one. The team is doing great work and it's clear they prioritize field workers (utilities, telecommunications, and other service industries) heavily.

The application is sticky for workers, which is a positive metric for SaaS technologies: more than 72% of users are active each month.Part of that adoption is driven by the application being available everywhere: iOS, Android, Chrome web apps, etc. Additionally, there were three clear differentiators for Zinc:

- Hotline Groups: employees that need help in the field need help right away. Hotlines connect them with trusted SMEs internally for help and troubleshooting.
- Push to talk and hands-free mode: both of these are useful for non-desk workers in ways that exceed most of the other tools in the market.
- Conversation mapping/analytics: the screenshot above is an example of how employers can map conversations and identify key subject matter experts and influencers.

Also, the team at Zinc didn't just talk about communication for its own sake. They talked about outcomes that matter to leadership: ROI, employee retention, and more. This shows maturity for the team and bodes well for the future of the application.

About Lighthouse Research

[Lighthouse Research & Advisory](#) is a modern, independent analyst firm dedicated to setting the standard for excellence in talent, learning, and HR with practical research and a hands-on approach. By providing compelling research and actionable insights, our team enables HR, learning, and talent leaders to deliver more value to the business. Our research examines competitive practices, cutting-edge technologies, and innovative strategies.

Ben Eubanks is the Principal Analyst at Lighthouse, providing insights for today's talent leaders and vendor partners. His book, [Artificial Intelligence for HR](#), was published in 2018. This was the first piece of in-depth research on the topic published anywhere in the world and helped to solidify Lighthouse as a leading analyst firm.

Prior to joining Lighthouse, Ben worked as a researcher, writer, and speaker for nearly more than 10 years, focusing on learning, talent acquisition, and talent management. During his tenure as a researcher, he has published more than 1,000 reports, case studies, and articles in addition to providing advisory services to executives from some of the largest and most respected organizations in the world.

He also has hands-on experience working as an HR executive, leading both strategic and tactical talent practices and giving his research a distinctly practical perspective. Ben has interviewed business leaders from notable organizations such as Southwest Airlines, H&R Block, and AlliedUniversal in his role as the host of [We're Only Human](#), a podcast focused on the intersection of people, technology, and the workplace. In addition, he founded and operates upstartHR.com, a community serving HR leaders that has reached more than one million readers since its inception.