

A series of white, overlapping geometric lines and polygons on the left side of the slide, creating a complex, abstract pattern.

SBA MINI GUIDES EMPLOYEE EXPERIENCE AUDITS

A step-by-step guide to learn what your people truly experience everyday at work – and do something about it

EMPLOYEE EXPERIENCE (EX) AUDITS

Every company *says* it cares about people.

But unless you actually stop and ask, it's easy to miss what employees are dealing with day to day.

People's expectations at work have changed - fast. What used to feel like "a good job" isn't enough anymore.

Employees want clarity, recognition, growth, and to feel that what they do actually matters.

And they want that experience to hold up whether they're in-office, hybrid, or remote.

An employee experience (EX) audit helps you **pause and check**:

- What's working well for our people right now?
- What's getting in their way?
- What should we be focusing on - and what can we fix fast?

Understanding the day-to-day experience your people actually have is the best way to **make smart, focused changes that make work better for them and the business.**

STEP 1 MAP THE EMPLOYEE JOURNEY

Break the employee experience into stages.

Look at what happens in each, what’s going well, and where people get stuck.

TIPS:

- Don’t overcomplicate - use 4 or 5 stages that reflect real employee milestones.
- Ask recent hires and exits to walk you through their actual journey.
- Focus on where people get stuck or confused, not just the formal process.

STAGE	WHAT TO LOOK AT	WHAT MIGHT BE GOING WELL	WHAT TO WATCH FOR
Onboarding	First 30–90 days	Welcome process, clear tasks, buddy system	Confusing info, tech delays, low manager involvement
Day-to-Day Work	Tools, workload, team setup	Good collaboration, solid tools	Overwork, unclear priorities, isolated roles
Feedback & Recognition	How people get feedback or feel appreciated	Peer shoutouts, 1:1s	Infrequent manager feedback, unclear promotion paths
Learning & Growth	Access to learning, career opportunities	L&D platform, internal mobility	Unclear growth paths, little support for development
Exit or Transition	Internal moves or offboarding	Clear exit steps, alumni network	No stay interviews, missed retention signals

STEP 2

COLLECT SIGNALS FROM YOUR PEOPLE

Gather feedback from different sources to build a fuller picture of what people are actually experiencing.

TIPS:

- Use a mix of data: numbers show scale, stories show *why*.
- Keep focus groups small and casual to get honest feedback.
- Watch for misalignment between survey scores and real-world behavior.

SOURCE	WHAT IT TELLS YOU	HOW TO USE IT
Pulse Surveys	Where people are satisfied or struggling	Look for dips in trust, workload, or growth sentiment
Focus Groups	First-hand stories and nuance	Dig into “why” behind the scores
Exit or Stay Interviews	What makes people leave or stay	Spot patterns in motivation, blockers, or burnout
Internal Chat/Comms	Tone, frustration points, recognition culture	Pick up real-time signals of team health
HR Data	Turnover, internal moves, manager changes	See what’s changing beneath the surface

STEP 3 SPOT WHAT'S DRIVING (OR HURTING) THE EXPERIENCE

Once you've mapped the journey and collected signals, assess the biggest experience drivers across teams.

TIPS:

- Don't rate everything: identify the 2-3 most influential drivers right now.
- Check whether manager behavior is enabling or blocking good experience.
- Compare results across levels or locations to surface hidden patterns.

DRIVER	WHAT TO CHECK	SIGNS IT'S STRONG	SIGNS IT'S SLIPPING
Manager Support	Feedback, trust, coaching	Regular check-ins, open conversations	Unclear expectations, avoided feedback
Workload Balance	Focus, burnout risk	Prioritized work, team alignment	Long hours, constant firefighting
Growth Visibility	Clear paths, skills focus	Internal mobility, L&D access	"No time to grow," unclear next steps
Belonging & Connection	Team safety, inclusion	Peer support, visible appreciation	Isolation, low team engagement
Purpose & Impact	Feeling of meaning at work	People connect work to goals	"Why are we doing this?" vibes

STEP 4

PICK 2-3 CHANGES TO MAKE NOW

Turn what you've learned into a few simple changes – there may not be a need for a full overhaul. **Focus on quick wins with visible impact.**

TIPS:

- Choose changes that can be seen and felt within 30–60 days.
- Assign real owners with the authority to act, not just observe.
- Communicate what you're doing and why - so employees feel heard.

FOCUS AREA	EXAMPLE ACTIONS YOU COULD TAKE
Career Visibility	<ul style="list-style-type: none"> • Host quarterly “career path stories” with internal talent • Create a map of lateral moves per team • Add career conversations to 1:1 templates
Manager Support	<ul style="list-style-type: none"> • Launch short “manager feedback labs” • Pair new managers with peer mentors • Engage managers in monthly micro-skill coaching sessions
Workload Management	<ul style="list-style-type: none"> • Run team-level workload audits • Cancel low-impact recurring meetings • Set up “no meeting zones” each week
Hybrid Connection	<ul style="list-style-type: none"> • Standardize inclusive meeting formats • Build a team ritual library • Train team leads on async leadership
Recognition	<ul style="list-style-type: none"> • Give managers monthly “who to spotlight” prompts • Add shoutouts to team retrospectives • Launch a peer nomination wall
Psychological Safety	<ul style="list-style-type: none"> • Train team leads to ask “how’s your load?” in every 1:1 • Run listening sessions by level or team • Share anonymized Q&A themes company-wide

Note: This table is not meant to be a full list. These are examples to help you think through what could work in your organization.

WHAT'S ONE THING YOU'LL DO DIFFERENTLY AFTER THIS AUDIT?


When that experience is unclear, inconsistent, or disconnected from what people need, performance and trust start to slip quietly but steadily.

Getting employee experience right leads to real business results. It fuels retention, improves productivity, and builds a culture people want to be part of, and stay in. When people feel seen, supported, and set up to succeed, everything else works better.

How SBA can help. Working on employee experience is often messy, emotional, and high stakes - and you don't have to do it alone.

Here's how SBA can support your next step:

- Design and run your employee experience audit - We build custom listening strategies that get real insights, not just ratings.
- Coach managers to lead better experiences - Through labs, group or individual sessions, and behavior nudges that actually stick.
- Turn feedback into action plans - We help you prioritize and implement fast, visible changes that rebuild trust.



Let's talk about making your organization a great workplace

GET IN TOUCH TODAY!

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Company XYZ ran a quick, focused employee experience audit in response to growing concerns around retention and feedback quality.

They mapped the employee journey, collected input from multiple channels, and rated five key experience drivers.

The process revealed that employees lacked clarity on career growth, felt feedback was inconsistent, and hybrid workers felt less connected.

Rather than overhauling everything, XYZ focused on three targeted, high-visibility actions with clear ownership and timelines.

STEP	FOCUS	KEY FINDINGS AND IMPLICATIONS	ACTIONS TAKEN OR PLANNED
Step 1 Map the employee journey	<ul style="list-style-type: none"> Mapped lifecycle: onboarding, daily work, growth, recognition, exit 	<ul style="list-style-type: none"> Gaps in early manager touchpoints Low visibility into internal career paths 	<ul style="list-style-type: none"> Reinforced onboarding with manager check-ins Launched quarterly internal career spotlights
Step 2 Collect signals from your people	<ul style="list-style-type: none"> Collected input: pulse surveys, exit interviews, manager feedback 	<ul style="list-style-type: none"> Career clarity and feedback quality were consistent concerns across data sources 	<ul style="list-style-type: none"> Triangulated themes used to prioritize improvement areas Shared findings in team huddles
Step 3 Spot what's driving (or hurting) employee experience	<ul style="list-style-type: none"> Rated key drivers: manager support, growth, workload, connection 	<ul style="list-style-type: none"> Manager support and career visibility rated lowest Hybrid inclusion rated strong 	<ul style="list-style-type: none"> Prioritized actions where scores were lowest but momentum was feasible within 90 days
Step 4 Pick 2-3 changes to make now	<ul style="list-style-type: none"> Defined and launched 3 high-impact, visible changes 	<ul style="list-style-type: none"> Needed actions that built trust quickly and showed employees their voice led to real change 	<ul style="list-style-type: none"> Rolled out manager coaching "labs," hybrid team rituals toolkit, and spotlighted career paths
Assessed business impact for company XYZ	<ul style="list-style-type: none"> +12% increase in reported employee confidence about internal growth opportunities (measured via <i>Pulse survey</i>) 18-point improvement in feedback satisfaction scores among junior and mid-level employees Faster internal mobility, with 14% uptick in internal applications within 60 days of launching spotlight sessions Higher hybrid engagement, reflected in positive comments about inclusion in planning and team rituals Stronger manager participation, with 85% of people leaders completing feedback lab sessions within the first rollout phase 		

NEED HELP?

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teams | Better results

We help build organizations where
people perform at their best – so the
business does too.