

DEAN E. CARTER

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MARK LEVY

EMPLOYEE EXPERIENCE DESIGN

HOW TO CO-CREATE
WORK WHERE PEOPLE *AND*
ORGANIZATIONS THRIVE

WILEY

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*To every employee who has never been asked—your
voice matters.*

*To the leaders brave enough to listen—thank you for making
work better for everyone.*

Contents

PART I	Imagine	1
Chapter 1	The \$100 Bill <i>Seeing Value Others Overlook</i>	3
Chapter 2	Hardball Objections, Straight Answers	9
Chapter 3	The North Star <i>The EXD Guiding Principle</i>	21
Chapter 4	A Conversation with Beth Grous <i>The Impact of Trust and Humanity, and the Courage of Everyday Leaders</i>	35
PART II	Prepare	47
Chapter 5	Mindsets <i>Seven Mindsets for Employee Experience Design</i>	49
Chapter 6	A Conversation with Kirsty Lloyd <i>How Empathy and Feedback Became Cultural Anchors at Scale</i>	63
PART III	Design	77
Chapter 7	Culture Check <i>Moments That Matter and Moments of Truth</i>	79

Chapter 8	Three Frameworks <i>A Structure for Achieving Meaningful Design</i>	87
Chapter 9	The Double Diamond <i>A Proven Design Method</i>	109
PART IV	Experiment	137
Chapter 10	The EX Blueprint <i>Letting Everyone See the Big Picture</i>	139
Chapter 11	A Conversation with Melanie Rosenwasser <i>Bringing UX Rigor to EX: It's a Product, Not a Perk</i>	145
PART V	Measure	159
Chapter 12	Metrics That Matter <i>Taking the Pulse of Your Organization</i>	161
Chapter 13	A Conversation with Greg Pryor <i>Turning Experience into Intelligence and Then into Impact</i>	175
PART VI	Celebrate/Extend	187
Chapter 14	A Conversation with Michelle Bonfilio <i>The Emotional Core of Employee Experience Design</i>	189
Chapter 15	Making EXD Your Own <i>Final Wisdom and What Grows over Time</i>	205
	<i>Postscript: A Personal Reflection from the Authors</i>	211
	<i>Acknowledgments</i>	213
	<i>About the Authors</i>	219
	<i>Index</i>	223

PART

I

Imagine

1

The \$100 Bill

Seeing Value Others Overlook

Books like this one can feel a bit impersonal, but even though we are not sitting across from you, we're pretty sure that we know a little bit about you:

- You're a **leader of people** or take initiative to lead in your organization;
- You are tired of the traditional approach HR has taken in driving their initiatives into the organization;
- You are open-minded and **looking for ways to improve your organization**, or else you would not be reading this book;
- You've probably been around the block a few times and have **seen plenty of fads come and go**; and
- You have a **highly developed BS meter**.

How did we do? If this sounds like you, we're going to have a great time together.

You'll hear much more about us in the following pages, but it's important for you to know this: The three of us collectively have more than 75 years of experience in HR/EX and other leadership roles in organizations of all sizes—and we have super-sensitive BS meters, too.

Our purpose in writing this book is to give you insights that you can immediately use to improve your organization.

Because you've been around the block, right away we have a challenge on our hands: You've probably heard of "Employee Experience" or "EX." We'll be taking you through an approach to EX that is next level, and known as **Employee Experience Design**, or EXD. Relatively few organizations have fully implemented EXD, and the benefits are huge for those that have.

Our further goal is to talk with you, practitioner to practitioner, leader to leader. We don't need to tell you how hard it is to implement an initiative in your organization—no doubt you have the scars to show for it.

That means we've set the bar high for this book: We need to tell you at least a few things even you didn't know and that you can use right away in your own unique circumstances. It's a tall order, but we're up to the challenge.

It's Not Just a Book—It's a Handbook

Books are great, but often a handbook is even better, and that's what we've created here. Because we don't know your particular situation, we've laid out this handbook in a way that you can jump around to suit your interests, and easily refer back to sections as you work through challenges in your organization.

In this handbook, we try to cover three important aspects of EXD:

- 1. The Why.** Skeptical people are the best: They have lots of questions and need convincing before they'll get onboard with anything. This first part of the handbook covers why EXD is so important and addresses many legitimate—and tough—questions you may have. We also talk about how EXD leads to better business outcomes.
- 2. The What.** We have supported EXD in hundreds of organizations worldwide. This part of the handbook gives you the important mindset shifts, principles, decisions, actions, and tools you can use to implement EXD in your organization.
- 3. The How.** The greatest insights are useless if they never get implemented. But organizations are like fingerprints: no two are exactly alike, even though there are similarities. In this part, we give you what you need to know in order to make EXD work for your particular circumstances and for your role in the organization.

You're in for a Treat

We know literally thousands of professionals in HR/EX and other leadership roles, and some of those people shine like bright stars. They're special in at least two ways: they've implemented EXD in difficult circumstances, and they're great at telling their story.

Not only do we have full conversations with several stars in this handbook, but you'll hear from many others in the context of certain points we make throughout these pages.

The \$100 Bill

We'll get into lots of hard-hitting questions soon, but right away we want to address what you might be thinking now:

■ If EXD is so great, why hasn't it gone viral? Why doesn't every organization use it?

Fair question, and it's where our parable comes in. Imagine that a wealthy person lost a \$100 bill in a snowstorm. It landed in a gutter and got plowed into a pile of snow. Some days later, just a portion of that bill became visible in the snow and mud.

The vast majority of people walk right by because they're busy, late for a meeting, on the phone, whatever.

A few people see something muddy and green, but hey it's a thing in the gutter.

Perhaps hundreds of people will walk by before someone stops, takes the time to recognize it, and makes the further effort to fish it out of the mud. The value of the bill was always there, but only a fraction of people will be in a position to both recognize it and take action.

EXD is the \$100 bill. The mud is all the years of annual surveys and shiny new tech tools that obscure the true value of EXD, not to mention the barrage of information that buries us in more mud each week. If we can see past all that, EXD is there for the taking.

You're the one who paused and picked up what you saw as valuable, in the form of this handbook. What you'll learn can be transformative for your organization and for your career, as you'll soon see. It could even be worth millions.

Who Are We?

We are Dean E. Carter, Samantha Gadd, and Mark Levy. How three people from different continents and companies ended up writing a book together is a story we'll share later. And instead of writing out lengthy bios, which change regularly, we thought it would be more interesting to describe some of our collective professional experiences in no particular order:

- Sold adult diapers for Procter & Gamble.
- Worked as a labor-law attorney for a company where our job was to catch people making mistakes.
- Was CHRO for a 240,000-person company.
- Worked as a travel agent.
- Was an area trainer.
- Currently and in the past, have been on the boards of many companies.
- Lived and worked in Paris (very different organizational approach in France).
- Created a leadership development program.
- Dean of an academy for future heads of HR.
- Global head of talent at a branding and design firm.
- Learned how to sell and adjust eyewear.
- Built a woman-owned consultancy that's the largest of its kind in New Zealand.
- CHRO for iconic worldwide brands like Patagonia, Levi's, Gap, Eddie Bauer, Best Buy, Airbnb, Technicolor, Fossil.
- Have had the following departments reporting to one or more of us:
 - HR
 - Food and facilities
 - Safety and security
 - Wellness
 - Social impact

- Finance
- Real estate
- Legal
- Family services

Although the three of us come from very different backgrounds, we share a common belief—HR and other roles that affect the experiences of employees are absolutely critical to the success of every organization. We also know that most of these roles have a pile of work, competing priorities, and limited resources.

This handbook can be an antidote to that situation when you apply what you learn here. We'll guide you through a path to do more that does not involve the typical "solution" of adding more to your plate or asking for a larger budget.

What EXD and This Handbook Are Not

Let's look at what else EXD and this guide are not:

This is not a disguised pitch for expensive consulting services.

On the one hand, it's true that we haven't found a way to condense three careers' worth of knowledge and experience into one volume. But we can guarantee you this: After finishing this guide, you'll have clarity on the specific path you can take to implement what you learn here, with nothing further to buy.

Because we want to support you in ways that extend beyond this handbook, we will occasionally point you to a URL where you can leave your email address and we will send you (at no charge) additional reading or resources like handouts.

EXD is not a silver bullet. You won't hear us making any claims along the lines of: "Five simple steps to revolutionize your business!" EXD takes real work to pull off—sometimes hard work by you and others. There will also be setbacks because we both know that real progress never happens in a straight line. But as you'll see, you're very likely to wish you had known of this approach much earlier in your career.

EXD is not “one size fits all.” That’s both bad and good news. The bad is the work necessary to adapt EXD to your organization. It will take some practice to get full benefits from it. As you’ll read later, we’ve certainly made our share of mistakes along the way. The good news is you will soon have something that’s tailored to your unique situation and that delivers a substantial ROI on your efforts.

Finally, this is not a “once and done” deal where you can form a team, get a new logo designed, and then check it off your list. We think you’ll agree that we live in a continuous state of change. Whether it’s the government, economy, pandemics, competitors—you name it—the only reliable touchstone is change. EXD is not a quick or new shiny tool but a mindset, as we’ll talk much more about. You’ll find yourself applying that mindset again and again to meet whatever is the next challenge.

We decided to write this book because practically every week, one or another of us is traveling somewhere in the world, advising organizations, giving keynotes, or implementing EXD. We get asked certain questions over and over, and there never seems to be enough time to do justice to the answers. Albert Einstein once said that the goal is to reach “simplicity on the other side of complexity.” In other words, if you really understand something, you should be able to boil it down to the essential principles. This book is our attempt to do just that.

2

Hardball Objections, Straight Answers

“It ain’t what you don’t know that gets you into trouble. It’s what you know for sure that just ain’t so.”

—*Attributed to Mark Twain*

As we said in the last chapter, we like skeptics. They’re the folks that don’t quickly salute the next initiative because they have questions, and sometimes lots of them. They may take a while to be convinced of something because they want a solid foundation of understanding.

Of course, you can tell we’re big fans of Employee Experience Design, or we wouldn’t have written this book. But in this chapter, we want to focus on people who may have a number of concerns or objections.

First, Some Definitions

We’ll get into the tough questions in a moment, but it makes sense first for us to get some basic definitions out of the way. First, when we refer to “employees,” we’re being inclusive to mean full-time employees, part-time ones, contractors, volunteers—people who work together to deliver on a business promise.

Next, “Employee Experience” or “EX” is not an initiative or set of tools—it’s a combination of three things:

1. **It’s a mindset.** We’ll discuss this in detail in Chapter 5;
2. **It’s ways of working.** Multiple chapters will give you the methods we’ve used; and
3. **It’s organizing what was the HR function** beyond the traditional responsibility or scope.

It also is the combined thoughts, feelings, and interactions that employees have at work. EX can be great, terrible, or somewhere in between, and every organization has EX, whether it recognizes it or not.

In this handbook, we focus on “Employee Experience Design” or “EXD.” Extremely few organizations have fully developed EXD efforts, even though they may think they have them. (To complicate things a bit, early on, the term “EX” referred to both the design and the outcome. The two terms later evolved to mean different things.)

The great power of the word “design” is that it refers to intentionality. EXD is the proactive and intentional process of creating and improving employee experiences. As Steve Jobs said: “Design is not just what it looks like and feels like. Design is how it works.” Here’s the very most succinct way we can state it:

■ Employee Experience Design is designing *with* people and not *for* them.

If you read this handbook and remember nothing else beyond those 11 words—and you implement them—you will be ahead of the vast majority of organizations on the planet. That’s the essence of the book. There you have it.

For too long, leaders in HR and elsewhere have made decisions independently from what employees think or need. They’ve done so without leveraging their valuable input to determine the priorities that will help them to deliver on organization goals and the customer experience. As a result, they’ve pushed their agenda into the organization, rather than leveraging the voice and input of employees. They did things *TO* their employees, instead of *WITH* them. This is the monumental change that EXD is all about.

We mentioned Einstein in the last chapter. He came up with the most famous equation ever, which is $E = mc^2$. We are not claiming to be Einsteins, but here's the similarity: It's easy to write out a definition of something, but the real effort is in understanding how and when to apply it. The rest of this handbook is devoted to benefitting from our experience in how to design with people and not for them.

Now for Those Hardball Objections

You and we all know how the game works in organizations: Some new project comes down to us from on high. We may be given the opportunity to ask questions, but the expectation is that we're on board and only asking for clarification. Those soft questions can be fine, but what we want to do now is ask some tough ones, then answer them.

“EXD is nothing but a fad. Even worse, it's a fad that already has run its course. I heard about it even before COVID.”

There is some truth to this objection, but only a little. One of us (Mark) coined the term “EX” while at Airbnb in 2013. (Much more on my time at Airbnb later.) Therefore, EX (later EXD) has indeed been around since before COVID.

You might be interested in how the concept of EX started. I was interviewing at Airbnb and Brian Chesky, one of the founders, shared that everything he'd heard about HR he didn't particularly like. Brian asked if we could do things differently. He had just written an article in *Medium*, called: “Don't Fuck Up the Culture,”¹ and essentially told me that's the main purpose of the role he was looking to fill. This was music to my ears. I shared that he had a CX team that focused on feedback from customers to create a better travel experience. Why not have an EX team that focused on the feedback of our employees to create a better employee experience? If we treat our employees the way we want them to treat our customers (in our case, it's the host that delivers belonging to our guests), then we will create a virtuous cycle.

¹ <https://medium.com/@bchesky/dont-fuck-up-the-culture-597cde9ee9d4>

Back to fads: Whether something is a fad or not has to do with who adopts it and whether it's deeply integrated or merely toyed with. Years ago, we heard that the "quality movement" was going to be a "requirement of doing business" in the near future. Some businesses like Toyota fully adopted the principles while other manufacturers got on the bandwagon with signage and a little training, only to drop off soon after.

We've seen this phenomenon more recently with remote work. Some companies had strong remote capabilities before 2020, and then COVID hit. Everyone had to go remote, like it or not, which became a huge challenge for HR. Later came the backlash, with some organizations unplugging remote work and requiring 100 percent return to office. Some organizations have continued to be fully remote and others have found their sweet spot with a hybrid mix of remote and in person.

So, were the quality movement and remote work just fads? You can only answer that at the individual organization level. Even though it's a saying, it's also true: You get out of something what you put in. If an organization adopts the latest fad simply because it's what everyone else is doing—without alignment to strategy or business impact—then those efforts are fads for them. In contrast, another organization may adopt far fewer initiatives but does a great job of deeply learning, applying, and adapting them to its needs and connecting them to key business outcomes. It's that latter type of organization that will go the furthest with EXD.

“No offense, but this is window dressing BS. The real work of HR is recruiting, training, compensation, and policy work. Those are the things that MUST get done in the organization, and we only have enough bandwidth to do the must-haves.”

There is no question that recruiting and the other functions are key to HR's work. Here's the thing: EXD is not something you *add to your plate*; it's a mindset you use to look at what's on your plate in the first place. It's how you work with your employees, leveraging them to help set priorities and design solutions.

Let's take policy development as an example, and the reactive DEI initiative that happened after the George Floyd murder. HR departments and C-suites across the country were immediately tasked with developing DEI policies. What often happened was that Black employees were

not involved from the outset of the project and not asked for their thoughts about how best to approach it. Instead, policies were created and announced, pronto.

Sure, there may have been messaging to the effect of: “We’d love to hear your feedback,” but the subtext is usually pretty clear: *We’re the leaders and this is our policy. Do you have a problem with that?* Only the boldest few tend to speak up with comments.

It does not involve extra work to apply the EXD approach to a project. On the contrary: Designing a policy with employees and not for them means

EXD can result in less on your plate, not more.

that you might have more ideas from the outset. You’ll then go through fewer drafts to reach a workable policy. EXD can result in less on your plate, not more.

“The fact is, we don’t need EXD. We always have way more applicants than we have positions to fill. If a person can’t get on board with our approach, it’s easy to get someone who will.”

EXD is an advantage and not a necessity the way paying the electricity bill is. As we already said, plenty of organizations will do “business as usual” without ever designing things with employees.

But let’s look more closely at the situation of having more applicants than open positions. For most positions, there is a type of bell curve regarding who applies. At one end of the curve are the clearly non-qualified applicants. Then there’s the big center section (a.k.a. the “pig in the python”) where applicants are mostly qualified. At the top of the curve are the most-desirable applicants. They’re extremely well qualified and they (and employers) know it. Often these top applicants have more than one job offer and can take their pick.

Now consider job offers from two organizations for this same candidate. One organization makes a big deal of its EXD approach and the other doesn’t mention it because it doesn’t follow EXD. Might this be a factor that influences the candidate? EXD can become an edge in hiring, and can take even more off the plate of HR because it becomes easier to fill positions. In later chapters, you’ll hear some great stories about this competitive edge.