Many organizations struggle to measure the voice of the employee and take effective employee engagement improvement actions. HCM technology application leaders should use this guide to longlist providers entering VoE from multiple adjacent markets, and understand available solution types.

Overview

Key Findings

- The pace of change, digital workplace adoption (especially in light of COVID-19-driven rapid shifts to remote work) and increased focus on employee experience are well-documented. These factors are all driving organizations to seek more frequent means of monitoring and assessing employee sentiment.

- Traditional annual engagement surveys, while still important, are increasingly being augmented (and sometimes replaced) by other feedback tools (both direct and indirect).

- Voice of the employee (VoE) is an emerging market, with no single provider delivering capabilities across all categories. Early adopters are managing multiple survey-based and analytics tools in order to meet requirements.

- Some providers and their early adopter customers are beginning to blend VoE with other HR processes, such as continuous performance, rewards and recognition, learning and leadership actions. The goal of these mashups is to build an ongoing “sense and respond” talent management capability that crosses traditional application boundaries.

Recommendations

Application leaders supporting technology transformation for human capital management (HCM) should:

- Adjust VoE strategies to accommodate faster HCM and business decision timelines, including choice of metrics and measurement intervals.

- Determine the desired types of VoE “listening” (direct survey-based, focus group-based, indirect, inferred), their frequency and the extent to which VoE will be combined with other talent functions.
Select the right data sources and collection/measurement methods along with enabling technology options.

Implement innovative enabling technologies on a pilot basis, and be prepared to swap out technology components quickly based on changing business needs and maturity of options.

Make VoE initiatives actionable by equipping stakeholders with insights to support internal initiatives such as individual career development and recommended actions to broader employee segments.

Strategic Planning Assumption
By 2023, 80% of enterprises with 2,500+ employees will augment annual engagement surveys with pulse, focus-group-based or indirect methods to better understand worker sentiment.

Market Definition
Voice of the employee (VoE) refers to solutions that enable organizations to collect and analyze employee opinions, perceptions and feelings related to their experience at work. VoE helps organizations to better understand the employee experience, which is the cumulative effect of their interactions with customers, leaders, teams, processes, policies, enabling technologies and work environments (see Figure 1).

The Employee Experience
These solutions rely on engagement surveys, feedback tools and other data sources to monitor employee sentiment and infer employee preferences, opinions and well-being. The underlying goal of VoE solutions is to deliver in-depth insights with actionable guidance to stakeholders to help improve employee engagement, experience, productivity and performance. In doing so, VoE becomes a key component of an organizational “sense and respond” feedback loop that connects with most HR processes and HCM technologies and beyond (see Figure 2).

**Figure 2: How VoE Solutions Enable “Sense and Respond”**
VoE solutions enable collection and analysis of the employee voice from four main feedback types:

1. Direct survey: A proactive request for feedback, either ad hoc or event triggered.

2. Focus group: Deriving more in-depth insights on a given topic based on either participant’s direct ratings/feedback or a given participant’s reactions to other participant feedback.

3. Indirect: Gathering and analyzing sentiment expressed in other platforms, such as external sources (LinkedIn or Glassdoor for example) internal collaboration tools (Slack, Microsoft Teams) or HCM systems (admin HR, talent management, workforce management).

4. Inferred: Observing employee usage of systems to analyze behavior and communication patterns and ultimately to infer perceptions and sentiment.

Solutions utilizing the first two methods include tools to develop and administer various types of surveys and focus groups. In contrast, those depending on indirect or inferred feedback sources don’t require this capability. Regardless of the feedback types, VoE solutions must enable users to aggregate and analyze it at various cohort and organization levels to highlight sentiment “themes.” Some solutions also link insights to recommended leader actions to remedy common negative sentiment issues and/or reinforce areas of strength in a given organizational unit.

Market Description
The current VoE market is fragmented and still coalescing, driven equally by historical usage patterns in various organizational size segments and by emerging trends. Most organizations with more than 2,500 employees had their first VoE exposure via some type of annual engagement survey, which have been available in various forms for decades (see "Measuring Employee Engagement: Past, Present, Future" for details). However, the pace of digital transformation and disruption in the 2010s caused many organizations (larger and smaller) to look for more frequent feedback from employees. This was so that they could more rapidly address engagement issues. This gave rise in 2015 to a new class of solutions that employed “pulse” survey methodologies and tools. Early success of pulse early adopters in both midmarket and larger enterprises drove most annual engagement survey providers to add pulse features over the next few years.

Concurrently, other organizations experimented with focus-group-based feedback solutions already in use by their customer support and marketing teams, since voice of the customer (VoC) was (and still is) a more mature discipline than VoE. In response, some VoC providers are now delivering VoE use cases as part of their solutions, which has further fragmented this market.

Another concept from VoC that is emerging in the VoE market is that of event-based triggering of feedback opportunities. Similar to when a customer completing a purchase is given an opportunity to provide feedback, VoE interactions can provide valuable insights when triggered by employment events. Examples include completion of initial onboarding activities, the first year in a job role, returning from a leave of absence, or after a major promotion involving relocation. Most VoE providers have either delivered or are planning an event-based option, and this will be one focus of development efforts over the next three years. Additionally, many organizations want to explore the interrelationship between VoC and VoE data so that leaders can determine how employee engagement issues might affect customer satisfaction. This goal will also shape vendor roadmaps over the next five years.

Other organizations are seeking more real-time visibility into the sentiment of employees within their enterprises. They are experimenting with various organizational network analysis and social analytics tools to infer sentiment from internal digital workplace environments, talent processes and external sources. Insights gained via these tools to date have mostly been used to supplement more direct survey-based insights. Early adopters have often struggled with how best to combine these various inputs, since they often vary in their level of granularity and trust.

Despite the somewhat chaotic nature of the current VoE market, it’s clear that most organizations believe that accurately understanding employee sentiment is more important than ever. Pre COVID-19, interest in VoE was driven by the desire to monitor engagement levels and retain scarce talent in low unemployment regions and industries. The immediate, urgent and forced transition to remote work environments over the first half of 2020 has revealed an equally compelling driver. Organizations now want to use VoE as a means to communicate care, listen to employee concerns, prioritize investments and quickly take action where necessary. Regardless of the uneven pace of economic recovery by geography and industry, VoE solutions will see increased market interest over the next five years at a minimum. This is because VoE measures in the current and
postpandemic environments are likely to change due to shifts in employment and changing relationships between workers and organizations. As a result, a more continuous approach to VoE will be more critical than ever before.

**Market Direction**

End-user investment in VoE solutions remains healthy, as many organizations are actively reviewing their current processes and enabling technologies for potential augmentation or replacement.

Gartner client inquiry indicates that the following objectives are most common to these initiatives:

- Increasing the frequency of employee feedback to improve responsiveness to organizational, market and societal disruptions.

- Reducing the time between listening and organizational response by improving data collection, analysis and communication process cycle times.

- Improving granularity of feedback and depth of insight while simultaneously preserving employee anonymity and data privacy.

- Increasing the number and types of feedback sources to derive more accurate, relevant and timely insights on the organization’s employee experience (see "How to Harness Voice of the Employee Insights for Continuous Employee Experience Improvement").

- Tightening the connection between VoE insights and organizational actions by linking to “continuous” talent processes such as performance, learning, career development, succession planning and rewards and recognition. This objective is highlighted by Gartner clients as the most nascent and experimental, although it may present the best longer-term opportunity to drive results.

- Enabling manager ownership of employee engagement improvement, by allowing manager survey self-management, and getting real-time insights to improve engagement within their teams.

- Empowering employees to take responsibility for their own engagement by delivering tailored insights on the drivers and resources needed to enable self-improvement.

- Understanding common topics and sentiment around aspects of culture (see “How HCM Technologies Can Support Cultures That Perform in Uncertain Times”).

To meet these objectives, application leaders supporting HCM technology transformation should:

- Adjust your VoE strategy to accommodate faster HCM and business decision timelines, including choice of metrics and measurement intervals.
Determine what types of VoE “listening” are desired (direct survey-based, focus group-based, indirect) and how much weight will be given to each type.

Consider emerging data sources such as HR portal site traffic/topic analytics as additional options. Be aware that the more listening types desired, the less likely that a single VoE solution will meet requirements. No VoE solution fully supports all types of VoE listening, so integrating multiple providers will be a common outcome.

Define the degree to which managers will be taking an active role in VoE listening. Also assess the readiness of the organization to tightly link VoE to other talent processes or work activities. Results of these two tasks will help drive tool selection.

Select the right data sources, collection/measurement methods, and enabling technology options. Assess how well the provider applies techniques like natural language processing (NLP) and event-triggered listening.

For innovations, evaluate and implement appropriate enabling technologies on a pilot basis. Test how employees and managers react to new ways of listening and responding to their expressed sentiment. Also, be prepared to swap out technology components quickly, based on changing business needs and maturity of options.

Make VoE initiatives actionable by equipping stakeholders to respond quickly to anonymized, aggregated insights coming from VoE data. Examples include recommended actions for specific communication issues, summary dashboards with drill-down to details, and links to leadership development content to mitigate negative employee perceptions.

Ask providers how recommended actions are built, and what algorithms are used to automate contextualized and personalized recommendations for individual managers.

Market Analysis

The purpose of this Market Guide is to help organizations looking for VoE solutions to create a longlist of potential vendors for further consideration. It is not meant to be a detailed feature/function comparison, and it does not contain qualitative product assessments. Instead, it aims to help organizations identify vendors to potentially include in a more detailed functional evaluation, based on a number of high-level criteria.

Vendor Categorization and Market Positioning

*Note that the vendor category order is based on estimated VoE market adoption/presence, as well as how providers have emerged or evolved over time (see Figure 3).*

**Figure 3: Major VoE Categories and Representative Vendors**
Major VoE Categories and Representative Vendors

<table>
<thead>
<tr>
<th>Service Focused</th>
<th>Technology Focused</th>
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<tbody>
<tr>
<td>CultureIQ</td>
<td>Culture Amp</td>
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<tr>
<td>Gallup</td>
<td>LinkedIn (Glint)</td>
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<td>Mercer-Sirolta</td>
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<td>Ultimate Software</td>
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<td>Questback</td>
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<td></td>
<td>SAP (Qualtrics)</td>
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Organizational Network Analysis
- Microsoft Workplace Analytics
- StatusToday
- TrustSphere
- WinningMinds

Social Analytics Applications
- Clarabridge
- Ground Signal
- Luminoso Technologies

Enterprise Feedback Platforms
- Confirmit
- Medallia

Simple Survey Tools
- Officevibe
- TINYpulse
- SurveyMonkey

Focus Group/Conversational
- Pax Republic
- Remesh
- Thoughtexchange

Other
- Achievers
- ADP StandOut
- Energage
- Explorance
- Humantelligence
- Humanyze
- Humu
- SelfDrvn
- Workhuman

Source: Gartner
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Services-Focused (Common): These providers entered VoE from the annual engagement measurement services market and have a long track record of managing survey data collection, analysis and communication of insights to customer stakeholders. They have strong domain knowledge in constructing and delivering validated survey models and associated benchmarks. Over time, most have either developed their own survey technologies, or leveraged an enterprise feedback platform partner in conjunction with their proprietary models, survey instruments and benchmarks. Most have incorporated some form of pulse capability to supplement annual surveys, and many can analyze verbatim responses to deliver sentiment analysis. It’s also common for this class of providers to include a library of recommendations linked to common issues to help drive action planning for leaders.

- Vendors include: CultureIQ, Gallup, Mercer-Sirolta, OrgVitality, Willis Towers Watson

Technology-Focused (Common): Providers in this category came from two main origins. The first began in the annual engagement market but focused on building robust and configurable engagement measurement survey platforms for larger complex organizations. In response to market trends and customer demand, they evolved their offerings to include pulse methodologies,
sentiment analysis and advanced visualizations. The second type emerged in the mid-2010s in response to the market call for more frequent employee feedback, and made pulse engagement measurement the centerpiece of their value propositions. Many of these vendors added annual survey management in response to their customers who were not willing to completely abandon it for pulse-only approaches. Others have built or acquired additional talent management capabilities (such as continuous performance management) to tighten the link between VoE and talent-related actions. The use of emerging technologies such as machine learning and NLP are common in these solutions.

- **Vendors include**: Culture Amp, LinkedIn-Glint, OrganizationView, Peakon, Perceptyx, Qlearsite, Quantum Workplace, Ultimate Software

**Enterprise Feedback Platforms (Emerging)**: These solutions are widely recognized for their ability to satisfy VoC use cases, and the vast majority of revenue of these providers comes from VoC (see “Market Guide for Voice-of-the-Customer Applications”). Some vendors recognized the similarity of VoC concepts and began applying them to employee listening about five years ago. As a result, they have helped drive overall adoption of VoE, particularly for large global enterprises desiring a common feedback platform for both customer and employee voice.

- **Vendors include**: Confirmit, Medallia, Questback, SAP Qualtrics

**Focus Group/Conversational (Emerging)**: These providers came out of VoC, higher education and public sector, where the need for in-depth feedback in a guided “town hall/forum” style delivered positive outcomes for early adopters. These solutions have now been applied to VoE by enabling users to set up forums on a particular topic and invite a subset of employees. Forum attendance can either be synchronous or asynchronous, depending on the provider’s capabilities. Key to this solution type’s effectiveness is the analysis of participant feedback to both the questions/topics submitted by the moderator, and the anonymous responses of other participants. Feedback is categorized by major themes and the associated strength of sentiment, whether positive, negative or neutral. Customers of these solutions often use them to supplement either annual or pulse surveys, and therefore partnerships with other VoE category providers are quite common.

- **Vendors include**: Pax Republic, Remesh, Thoughtexchange

**Basic Survey Solutions (Common in SMEs)**: These solutions began as general purpose survey tools that were predominantly sold to individual users within an organization to build surveys for customers, prospects, suppliers, and sometimes employees. Over time, some of these providers have packaged starter questionnaires and analysis templates for VoE. However, there are gaps in VoE domain expert support, cohort analysis is rudimentary compared to other categories, and benchmarking against peer companies is limited. However, ease of deployment and low cost make this solution type worth considering for an organization with less than 500 employees that is just
beginning its VoE journey. They can also be used effective within smaller subgroups or dedicated teams within an enterprise.

- **Vendors include:** Officevibe, TINYpulse, SurveyMonkey

**Social Analytics Applications (Experimental):** These solutions assist in the process of collecting, measuring, analyzing and interpreting the results of interactions and associations among people, topics and ideas from social media networks. As more citizens worldwide have adopted social media, the social media user base has grown more representative of the broader population. As a result, provider solutions have evolved to meet more specialized needs (see "Market Guide for Social Analytics Applications"). For VoE, these tools are used to gather and analyze employee thoughts/opinions expressed openly in public forums without being prompted by their employer. Although it is often difficult to reconcile indirect feedback with other more granular and structured forms, many organizations are piloting these tools. Therefore, more usage is expected as maturity of VoE use cases increases. This solution category can supplement other primary forms of VoE if proper care is taken to ensure the context of the feedback and “like for like” depth of insight.

- **Vendors include:** Clarabridge, Ground Signal, Luminoso Technologies

**Organizational Network Analysis Tools (Experimental):** These tools observe ongoing employee activity within existing digital workplace and enterprise applications to track behavior and communication patterns and infer sentiment and perceptions. The results are then used as supplemental insights combined with other more established VoE methods. Although there is great interest and curiosity on how to test out these methods, this area is the most experimental and usage is still infrequent. Usage of these solutions within VoE will continue to modestly increase over the next three to five years, based on these initial experiments delivering business value to early adopters.

- **Vendors include:** Microsoft Workplace Analytics, StatusToday, TrustSphere, WinningMinds

**Other Solutions (Experimental):** This category represents a number of providers that have taken unique approaches to VoE, often by combining it with other “continuous” talent processes beyond performance management. Some began in other HCM domains (such as rewards and recognition, learning and employee wellness) and have added VoE features (such as Achievers, Explorance, SelfDrvn and Workhuman). Others have combined VoE listening and/or cultural assessment with multiple talent processes, including performance, learning and leadership recommendations (such as ADP Standout, Energage, Humantelligence and Humu).

Early adopters of these providers tend to come from two main approaches:

1. Those willing to embrace a radical shift in people management practices to “continuous” throughout as much of the talent life cycle as possible, leaving current practices behind.
2. Organizations that support their current provider's product extension roadmap and are willing to bear with the trade-offs of new products in exchange for a more integrated solution.

Application leaders investigating the fusing of VoE with other talent management functions should expect more of these combined offerings over the next five years.

- **Vendors include:** Achievers, ADP StandOut, Energage, Explorance, Humantelligence, Humanyze, Humu, SelfDrvn, Workhuman

**Representative Vendors**

_The vendors listed in this Market Guide do not constitute an exhaustive list, but are intended to provide more understanding of the overall market and its offerings._

The VoE market has more than one hundred providers offering some form of VoE capability. This research highlights 40 offerings across the main categories listed above.

**Market Introduction**

The vendors profiled in this report include those commonly referenced in discussions with Gartner clients. Table 1 summarizes the 40 vendors reviewed as part of this Market Guide:

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**Market Recommendations**

Application leaders supporting HCM technology transformation should:

- Adjust your VoE strategy to accommodate faster HCM and business decision timelines, including choice of metrics and measurement intervals. Don’t be afraid to translate best practices from your organization's VoC program if it is more mature.

- Make sure that you have aligned resources to support listening activities, as well as buy-in from stakeholders across the business on how responses will be organized. In some organizations, executive leaders of business functions and managers will be ready to take a very active role in continuous listening.

- Determine what types of VoE “listening” are desired (direct survey-based, focus group-based, indirect, inferred), their frequency and the extent to which VoE will be combined with other talent
and business functions. Start with typical engagement measures. Seek to extend to other talent processes. Some will be able to extend to listening to many parts of the “day in the life” of employees in different job roles.

- Select the right data sources and collection/measurement methods along with enabling technology options. No one solution will support all activities. Determine what level of investment you are able to make, and what internal competency in advanced analytics and data science techniques to combine data from multiple sources. This will likely require some combination of hiring specialized resources, training existing staff, and securing consulting support.

- When introducing innovations, implement appropriate enabling technologies on a pilot basis. Be prepared to swap out technology components quickly based on changing business needs and maturity of options. Test how employees and managers are responding to new VoE deployments. Build on successful interventions to extend usage to more parts of the organization.

- Make VoE initiatives actionable by equipping all levels of stakeholders to respond quickly to the insights coming from VoE data. Evaluate providers on how well they automate the delivery of insights and advice to facilitators, managers or employees. Ask specific questions about what algorithms are used to personalize advice to different stakeholders, and how various levels of manager can be equipped to drive VoE initiatives.

**Note 1**

**Representative Vendor Selection**

*The vendors listed in this Market Guide do not constitute an exhaustive list, but are intended to provide more understanding of the overall market and its offerings.*

**Note 2**

**Gartner’s Initial Market Coverage**

This Market Guide provides Gartner’s initial coverage of the market and focuses on the market’s definition, rationale and dynamics.

**Recommended by the Authors**

*Measuring Employee Engagement: Past, Present, Future*

*How to Harness Voice of the Employee Insights for Continuous Employee Experience Improvement*

*Market Guide for Voice-of-the-Customer Applications*

*Market Guide for Social Analytics Applications*
Hype Cycle for Human Capital Management Technology, 2019
How HCM Technologies Can Support Cultures That Perform in Uncertain Times

Recommended For You

How to Enhance Employee Experience When Full HCM Technology Replacement Is Not an Option

Critical Capabilities for Cloud HCM Suites for 1,000+ Employee Enterprises

Magic Quadrant for Cloud HCM Suites for 1,000+ Employee Enterprises

Gartner Peer Insights 'Voice of the Customer': Cloud HCM Suites for 1,000+ Employee Enterprises

How to Harness Voice of the Employee Insights for Continuous Employee Experience Improvement