





# Behavioral Change Design

Westpac: Culture review and recommendations for TLAMB management

## Role: Service Designer

Our role was to take learning from an "Interim Solution" to timesheet management to make recommendations for the "Strategic Solution" to be rolled out.

-  Review key documents: program documents, customer feedback, change strategy, 2023 packs and guides and the enterprise agreement strategy
-  We explored the experience of the interim solution, internal customer needs and ways to close the gaps.
-  A total of 70 interviews and workshops with Employees, People Leaders, RGMs and Business leaders.
-  Captured learnings from the interim solution and ways to incorporate them in the next phrase



# Challenges

## Challenge 1

Adverse cultural change as Business Leaders looked for the "stick" vs the "carrot" which was conveyed throughout the training guides, policies, system and proposed performance management.

Culture of tension between leaders and fear for employees.

## Challenge 2

Interim solution perceived poorly; hard to use, inflexible, causing more challenges than it was worth. Lead with a '*compliance*' lens, not a '*benefit*' lens.

## Challenge 3

Perception: Timesheets were too hard. Broad scale acknowledgements of "fake timesheets".

# Discover and Empathise

## Our approach

We applied human-centred design principals across a 3-week sprint.

Steps and customer engagement included:

**15**

key documents reviewed, including program documents, customer feedback, change strategy, training packs and guides and Enterprise Agreement 2023.

**4**

Briefings with program leaders, business owners, and product demo sessions.

**12**

HR support team members (from HR Service Centre, HR Advice and Payroll) involved in discovery workshops.

**3**

Customer workshops with 7 x Employees and 10 x People Leaders in the business, such as RGMs in the branch network.

**19**

Customer interviews conducted with 9 Business Leaders and 10 HR Leaders from business divisions, at GM and Head Of / Business Manager levels.

**17**

Business and HR Leaders involved in two ideation sessions that looked at 5 opportunity areas at a deeper level to understand customer needs and inform our recommendations.

In our research, we explored the experience of the interim solution, internal customer needs and ways to close any gaps. We were unable to discuss with participants specific elements of the strategic solution with internal customers (e.g. employee participation and work schedules) as they have not yet been briefed. However, our approach enabled us to take insights on the interim solution experience and extrapolate these to apply more broadly.

As there were some good learnings from interim solution, we've also captured these for the team to consider and take forward into the next phase.

**~70**  
Participants  
in total

WE ARE



**We were contracted for the discovery work and to make strategic recommendations**

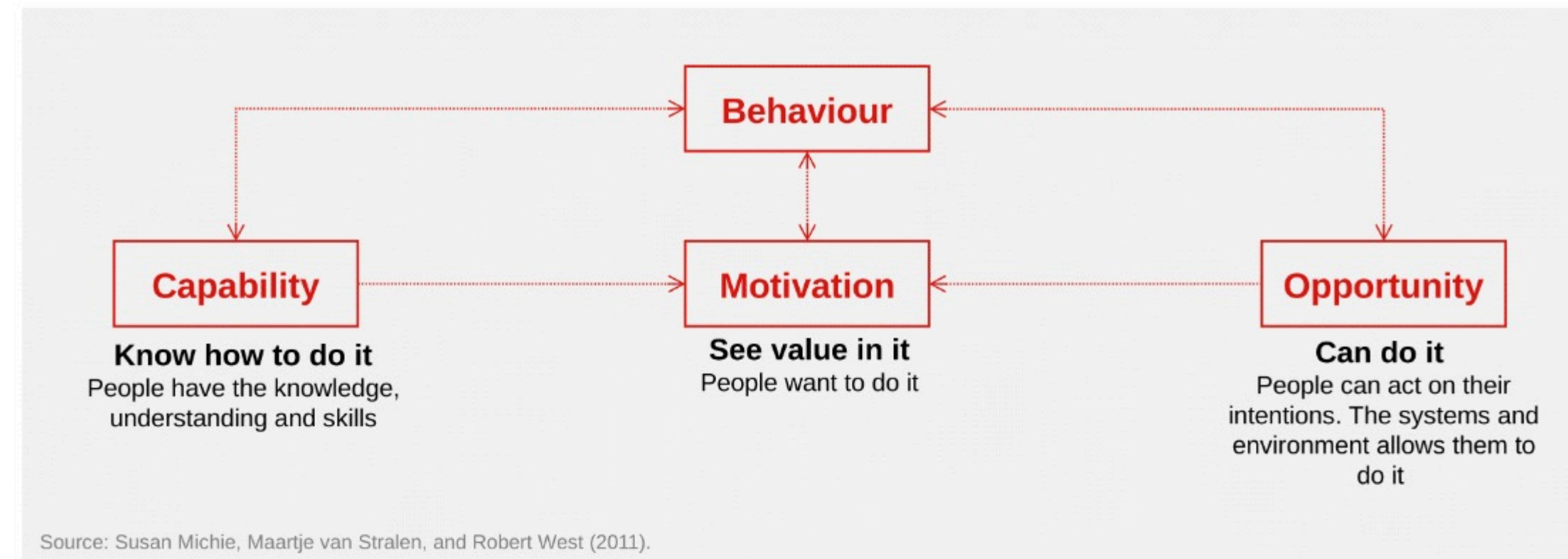
# Approach

## Useful behaviour change frameworks

In identifying strategic opportunity areas and framing our recommendations, we have leveraged behaviour change frameworks.

We recommend the COM-B model (below) for change programs that will have a significant impact on the organisation's culture and ways of working – like TLAMB.

Created by a team of researchers in the UK, they integrated 19 other frameworks to create this simple and powerful behaviour change model:



## Useful behaviour change frameworks (continued)

We incorporated MINDSPACE to design tactical interventions to include nudges. However, the impact of nudges will be limited if the setting is not right. We use this framework to inform our recommendations on how to gain message cut-through. This framework came out of the Nudge Unit, which was established in the UK Government's Cabinet Office.

MINDSPACE is an acronym.

<b>Messenger</b>	we are heavily influenced by who communicates information
<b>Incentives</b>	our responses to incentives are shaped by predictable mental shortcuts, such as strongly avoided losses and desirable gains
<b>Norms</b>	we are strongly influenced by what others do (social influence)
<b>Defaults</b>	we 'go with the flow' of pre-set options
<b>Saliency</b>	our attention is drawn to what is novel and seems relevant to us
<b>Priming</b>	our acts are often influenced by sub-conscious, repeated cues
<b>Affect</b>	our emotional associations can powerfully shape our actions
<b>Commitments</b>	we seek to be consistent with our public promises, and reciprocate acts
<b>Ego</b>	we act in ways that make us feel better about ourselves

Source: Institute for Government, UK (2010).

We referred to proven behavioural change frameworks to guide our interviews, workshops and recommendations.

# Interview & Workshop insights to key learnings

## Overarching insights and reflections: an organisational view

### Leaders on the back-foot

The timesheets system was introduced at a time when the new Enterprise Agreement was introduced and more employees were moving from 'packaged' to 'unpacked' with their base pay increasing and incentives removed.

Leaders felt on the back-foot and say their leverage to encourage people to complete timesheets was taken away. Compounding the issue was a lack of People Leader reports, which meant they did not know who to chase. To get more people completing timesheets, mixed and unsettling messages started to be delivered to employees. Additionally, as timesheets were launched during the holiday period, support was limited.

### Complexity leads to uncertainty

The complexity of the system and the detail required to understand *when* and *how* to claim has been a significant barrier for both employees and People Leaders. Non-standard items created confusion, a flurry of queries and special instructions. Ensuring these instructions reached the people who needed them has been challenging. With the focus so far being on completion rates, many Business Leaders are starting to raise questions about the quality of timesheets.

### Impact on culture

Implementing an interim timesheets solution has surfaced business practices that need to be resolved before the strategic solution is implemented. While it is acknowledged that budgets and overtime spend needs to be managed, it's led to inappropriate leader intervention and timesheet rejections. A human and values-based approach is required to ensure People Leaders are effectively managing additional hours worked by employees and resolving matters before rejecting timesheets.

Leaders have also raised concerns on unintended consequences of timesheets and the need to get the balance right: embedding customer-centricity, continuing a culture of care and flexibility, increasing compliance and managing costs. These concerns will grow once the group of people completing timesheets expands with the strategic solution. Coaching and guidance is required to help People Leaders understand what good looks like and how to find the best way forward.

"We've been on the back-foot from the start." Business Leader

"In 12 months, people are going to forget about that pay rise." Business Leader

"I was told that after January, we had to submit Timesheets or else no pay, but yet I'm unsure how that works if we're on annual leave for 5 weeks and no timesheets are submitted." Employee

"No-one is checking timesheets against what's in AOM." Business Leader

"It would be a terrible outcome if people stopped picking up customer calls or wrapping up a call because of timesheets and over time." Business Leader

## Overarching insights and reflections: lessons from the interim solution

### Customer feedback

Lead time was not enough, particularly for something that has a high impact on people's work life, is complex and unintuitive

Timing of the launch was problematic

Change initiatives can not be viewed in isolation. People Leaders experienced the compounding effects of multiple changes leading to uncertainty, dissatisfaction and bewilderment

Support levels were inconsistent and it felt like everyone, including support teams, were learning at the same time, with HR teams reactively dealing with issues as they arose

GMs set the tone, however, reliance on leader-led, cascading information mixes and dilutes the message

Business was taken by surprise, while some were made aware timesheets would be coming, they didn't fully appreciate what that meant to their business and people

People simply forget to do timesheets and need reminding, but broadcast emails get lost and people associate them with spam

People's ability to access the system for reporting has impacted compliance levels. Access to accurate reports has been a particularly frustrating for People Leaders

### Learnings

- For changes of this scale, People Leaders said they'd expect at least 2 months notice
- Solutions must be intuitive, reducing customer actions and friction wherever possible
- An MVP with one operational team would surface gaps early

- Avoid holiday periods as during these times customer support is limited

- Proactively connect the dots for People Leaders and understand their needs
- Help People Leaders understand what good looks like and provide coaching and guidance
- Consider the holistic experience of Support Teams, People Leaders and Employees

- Clear support model in place with help easily accessible when change is introduced
- Single source of truth (one stop shop) that's easy to use and understand
- Practical 'how to' training sessions for Support Teams and People Leaders well ahead of launch and additionally during the rollout period
- Hands-on customer testing to enable the proactive identification of any gaps or issues

- GMs who have a can do / 'make it happen' mindset achieve strong compliance results
- A strong *why* will be believed if all actions (what people are asked to do) are aligned with the *why*.
- Ensure channels are in place to rapidly reach employees and People Leaders

- Co-design solutions with the business and work with them to embed timesheets in business practices
- Do more than inform; proactively engage and collaborate on solutions
- Adopt a 'no surprises' approach and manage expectations early about what the strategic solution involves

- Use behavioural science to gain message cut-through
- Deliver targeted messages, sometimes in unexpected places and use creative methods

- Everyone needs easy access; A mobile experience will help close gaps and give people another option
- Accurate reporting for People Leaders is critical, as what gets measured gets done. People Leaders need to know who to recognise and who to follow-up with.

2 levels of insights were provided; evidence, translated to implication and the leanings that could be then drawn.

# Generation of change behavioural models

## Overarching insights and reflections: summary

Below is a snapshot of our insights and learnings that helped inform our strategic opportunity areas.

<p><b>Must be easy</b></p> <p>Simplicity builds confidence. While the interim solution is perceived poorly (with concern for poor UX, limited functionality and reporting), people have a clear view on what would add value to their workplace and management, including the use of data, automation, mobile access, design and nudges.</p>	<p><b>Actions speak louder than words</b></p> <p>For the why to be believed, the intent must align to what HR and People Leaders are asking of employees. Employees who currently don't see the point of the activity include those who enter the same time each week, their timesheets don't reflect the extra time they've worked, or they've been a long-term employee and enjoy putting in discretionary effort.</p>	<p><b>Support and source of truth</b></p> <p>People need to know where to go for simple, clearly explained truth. System complexity and rules are leading to errors or people calling HR multiple times about the same issue. Due to the learning curve being steep and people can't retain the information they've been told, people need to be able to access help in the moment and prefer visuals and short videos to help them grasp key concepts.</p>	<p><b>Balance customer, care, compliance and cost</b></p> <p>Coaching and guidance is needed for People Leaders on what's expected, what good looks like and how to adopt human and values-based approaches, with undesirable behaviours stamped out.</p>
<p><b>Leader-led, to a point</b></p> <p>While GMs need to be on the front foot and set the right tone, hierarchy can't be relied on to cascade important messages. Information gets lost, messages get mixed and diluted, leading to confusion and mistrust between HR, People Leaders and employees.</p>	<p><b>Co-design with the business</b></p> <p>A 'no surprises' approach helps to address expectation management and appropriate lead and launch times. While informing and engaging is important, business divisions want to collaborate on solutions and approaches to ensure their needs are understood.</p>	<p><b>It's all about time</b></p> <p>The way resources and time are managed across the business is profoundly different, however, they all value one source of truth and are seeking ways to improve their productivity and business practices.</p>	<p><b>Reporting and insights are value-driving services</b></p> <p>Business Leaders, People Leaders and employees all want data and insights to be integrated and surfaced, with dashboards and charts enabling them to understand what's happening at a glance. Business Leaders are also starting to shift the focus beyond completion to quality, highlighting the need to keep pace with changing customer needs.</p>

## Customer needs, actions and behavioural shifts snapshot

Throughout our research, we have identified the customer needs of the key groups for TLAMB as well as the behavioural shifts required, which inspires our recommendations.

Customer needs	Actions	Shifts
<p><b>Employees (eligible)</b></p> <ul style="list-style-type: none"> <li>Feel valued and safe</li> <li>Receive fair and accurate pay</li> <li>Clarity on what they need to do and why</li> <li>Admin tasks are purposeful, quick and easy</li> </ul>	<ul style="list-style-type: none"> <li>Submit weekly timesheets</li> <li>Adjust hours worked as needed</li> <li>Access PHQ for help or guidance</li> <li>Demonstrate values and behaviours</li> </ul>	<ul style="list-style-type: none"> <li>Tasks aligned to the intent (the 'why')</li> <li>Tasks and self-help at the click of a button</li> <li>Talk with their manager before entering additional hours</li> <li>Receive helpful guidance and nudges</li> </ul>
<p><b>People Leaders (PLs)</b></p> <ul style="list-style-type: none"> <li>Feel confident helping their people</li> <li>Clarity on what people need to do and why</li> <li>Feel listened to</li> <li>Processes simplified</li> <li>Easy access to the insights they need</li> </ul>	<ul style="list-style-type: none"> <li>Ensure work schedules are accurate and team completes timesheets</li> <li>Check and approve time each week</li> <li>Manage team CX, capacity, compliance and budgets</li> <li>Utilise coaching and guidance provided by HR</li> <li>Demonstrate values and behaviours</li> </ul>	<ul style="list-style-type: none"> <li>On the front foot, understand what good looks like and embed ways of working</li> <li>Encourage conversations on additional hours, resolve prior to rejecting timesheets</li> <li>Consistently demonstrate care for people and manage flexibility</li> <li>Access and utilise insights and reporting</li> <li>Check for both completion and quality</li> </ul>
<p><b>HR Support Teams (HRSC, Advice, Payroll, Business Partners)</b></p> <ul style="list-style-type: none"> <li>Feel confident supporting employees and PLs</li> <li>Clarity on what people need to do and why</li> <li>Feel supported knowing people have easy access to the tools and info they need</li> </ul>	<ul style="list-style-type: none"> <li>Assist customers with queries, in line with the support model</li> <li>Answer + educate at each interaction</li> <li>Flag emerging issues</li> <li>Use insights to advise the business</li> <li>Produce advice and guidance</li> </ul>	<ul style="list-style-type: none"> <li>Embed the customer support model</li> <li>Proactive issue management</li> <li>"Hyper help" before launch</li> <li>Backed by easy to use systems and reporting, automated processes, and aligned business practices</li> <li>Embed during onboarding</li> <li>Consider the holistic impact of decisions</li> </ul>

## Recommendations summary: driving behaviour change

Align intent and actions	Intent, actions and customer experience aligns		
<p><b>1</b> Align intent and actions</p> <p><b>Make it easy</b></p> <p><i>Prioritise people and their time</i></p> <ul style="list-style-type: none"> <li>Align rosters, work schedules, pay cycles to streamline the experience and help people understand their pay</li> <li>Pre-populate weekly timesheets for all eligible employees based on work schedules</li> <li>One click to submit each week with auto approve</li> <li>Few clicks as possible to make changes, quick conversation, seek approval</li> <li>Mobile experience to reach people who don't have access, with mobiles offered to them</li> <li>All employees and People Leaders can do their actions on-the-go</li> </ul>	<p><b>2</b> Set people up for success</p> <p><i>Embrace a human, values-based approach</i></p> <ul style="list-style-type: none"> <li>Principles and clear guidance to empower People Leaders</li> <li>Learn how to balance customer, care, compliance and cost management</li> <li>Practical 'how to' training to be in situ to applicable actions</li> <li>Equip them with the information they need to recognise and follow-up people (e.g. dashboards)</li> </ul>	<p><b>3</b> Create the right setting</p> <p><i>Shift the tone</i></p> <ul style="list-style-type: none"> <li>Create nudges that are purposeful and entertaining</li> <li>Encourage conversations (resolve over reject)</li> <li>Change the language to be more human, warm</li> <li>Lead with the carrot vs the stick</li> </ul>	<p><b>4</b> Lead through service</p> <p><i>Embed change at scale</i></p> <ul style="list-style-type: none"> <li>Implement 'change by design' through a co-design approach</li> <li>Listen to customer feedback and ask "How might we...?"</li> <li>Help customers apply principles (e.g. design your exit of day)</li> <li>Deliver valuable services (e.g. insights)</li> </ul>
<p><b>5</b> Build pay understanding and transparency</p> <p><b>6</b> Easy to access, easy to use</p>	<p><b>7</b> Empower People Leaders to balance customers, care, compliance and cost</p> <p><b>8</b> Deliver support, training and source of truth</p>	<p><b>9</b> Boost communication cut-through and incentives</p>	<p><b>10</b> Embed in business practices</p> <p><b>11</b> Deliver value through powerful insights</p> <p><b>12</b> Co-design with the business</p>

## 1 Align intent and actions

Motivation

This is the most important and defining opportunity area. Across the business, 'the why' messages relates to paying people correctly, ensuring people receive the entitlements they deserve, and monitoring additional hours and overtime to create a safe and sustainable business.

The GMs who advocate for timesheets are prepared to cover the cost of overtime if that's what the business and customers need. In these areas, compliance levels are higher as people can see a direct benefit, with the intent and actions aligning.

Where timesheets compliance levels are falling behind, is when people can't match the 'why' message with what they're being told to do. For example, people who work and enter the same times each and every week see their efforts as futile. If people are told to input their standard hours despite working additional time, it's considered "take timesheets" and wasted effort. Complexity has also crept in on how to manage flexibility, leading to off-system workarounds, inaccurate records and unnecessary distractions.

This all leads to people questioning the organisation's intent and purpose of the system. This questioning will only get louder once up to \$175k packaged employees are included in the mix. More concerning is the fear, mistrust and hostility surfacing in some business units.

With the introduction of the strategic solution, there's an opportunity to take a step back and consider: what's the problem we're trying to solve? What are our regulatory obligations? Are we asking people to do unnecessary work? Can we simplify to focus on what matters most, aligning our intent with employee actions?

### We heard:

"The most important thing is people getting the entitlements they deserve - overtime, extras, meal allowance. We don't want to remediate, we need to get this right." HR Leader	"We want to know about workloads. It comes up in every Voice+." HR Leader	"We [have] to submit Timesheets or else no pay." Employee	"I tell everyone in our business they need to record every minute." HR Business Partner	"The timesheets don't reflect the hours my people work." People Leader	"It's take timesheets... we can't be asking bankers to submit timesheets that don't reflect their true working hours." People Leader	"My wish is to only submit a timesheet where there is a change to their rostered hours." People Leader
---	---	---	---	--	--	--



All insights were mapped back to a behavioural change capability and recommendations provided in greater detail.

# Bringing everything together to enable change

### 1 Align intent and actions (continued)

How might we better align our intent and the why messages with the actions we ask of employees and People Leaders?

**Motivation**

UX considerations:

- Simple, human language
- Simple, easy to use interfaces
- Clear information architecture, reduced level of screens and entry depth
- Simply steps and requests, to reduce drop out and pop-up boxes and aid completion
- Surfacing of information and view across the entire week
- Encourage conversations between employees and People Leaders on the use of overtime. Consider a prompt: "Has your manager approved your overtime?" Simple questions, based on conversational language.

**WE ARE GROUP**

### 6 Deliver value through powerful insights (continued)

An opportunity to explore different methods and styles of data visualisation to create a meaningful impact across the business:

**Motivation**

Idea on how the dashboard works:

- Data, insights and actions are all in one place
- Total time view
- Different views, comparisons and trends
- Graphical information and snippets of analysed data
- Auto surfaces key and synthesised information
- Highlights key areas requiring people leader attention (e.g. incomplete timesheets, non-compliance hot spots)
- Further information surfaced with one click
- Drill up, drill down, and across
- Auto reminders for key team management actions, including taking RDOs, TOI, and leave
- Automatically takes into account people on leave, public holidays etc.

**WE ARE GROUP**

### 6 Deliver value through powerful insights (continued)

**Motivation**

Business Leaders and People Leaders

HR Leaders

HR Support Teams

“Reporting isn’t a great tool, but it would have helped, you need a tool to track it, you need to be able to put a finger on what exactly needs help.”

“6-7 months in, and still the reporting has been ‘not to zero’, business can’t track and enforce things they can’t measure and report on, it’s really hurt us. They can’t drill down into the high level numbers.”

“We need a People Leader dashboard – an insight view and an opportunity to drill down at all levels of leadership. It doesn’t identify your team – who you’re that variable week, instead of having a record, you just should be able to work it.”

“The data is the most difficult data to work with – the way data is reported with HR is not aligned with Finance. An organisation of the size and scale needs very good data.”

“I don’t think the reporting is answering the question of ‘why’ it is. I need on a daily and weekly basis who has and hasn’t done timesheets. I need it automatically, I can look at details, and ideally that would be done automatically, and ideally you would follow up on exceptions not every individual.”

“The reports are wrong. Timesheets were all submitted on Monday and approved on Monday morning were missing. Unsubmitted. We had emails saying ‘timesheets were submitted, it’s a known issue in HR’, I wonder if there’s more than that.”

“I don’t like to have a meaningful discussion that isn’t based on ‘their say’. It should be useful to understand the issues, more broadly. I’ve got no facts because we have been chasing the data down to an employee level – we haven’t been able to have the necessary conversations.”

“We need to get to leaders who can self-serve those insights and be empowered to take action. It’s not a mistake for HR to get the insights and come back to everyone. How can we help people take action with reporting and insights?”

“All we are doing is providing numbers which isn’t providing insights.”

“Our leading data is one place we’ll be a massive improvement and making it insights driven.”

**WE ARE GROUP**

### Next steps

Below is a summary of next steps to move from recommendations to actions and continue the CX design work to help drive and embed the desired behaviour changes.

- Align intent, actions and experience
- Design the end-to-end customer experience
- Develop a co-design approach and identify design challenges
- Build a roadmap with the business

**WE ARE GROUP**

### Potential Roadmap for next launch

With count down to launch, post launch up to implementation of compliance- Indicative only.

**WE ARE GROUP**

For each path there were several recommendations and a new plan for implementation generated

# What I Learned?

**There are many ways to create change**

Your approach must be thought out and layered

**The real challenge is making something dry seem fun**

If Vic Government can do it (Dumb ways to Die) so can you!

**Customers and employees pick up early on your intent**

It is better to show the benefits of change than the consequences of not.

# Questions

**End of TLAMB**