

# FRONTLINE FIELD VISIT GUIDE

## Designing with people, not just for them



Frontline employees represent the forgotten **80%** of the workforce. If we improve their efficiency by just **5%**, the operational and financial impact can far exceed gains made within desk-based teams. Yet most digital tools, communication strategies, and AI solutions are designed for people who sit in front of spreadsheets all day.

This guide helps you step into the real working conditions where your frontline employee app must deliver value, so you can observe, listen, and design an app experience grounded in reality.

### WHY FIELD VISITS ARE CRITICAL

Frontline employees operate in **high-pressure, time-sensitive environments** where every minute matters. They are standing, moving, driving, assembling, caring, and serving, often without the luxury of pausing to search through layered systems or lengthy updates. Yet many digital strategies are still built around **desk-based workflows**, optimized for documents, emails, and spreadsheets. Most AI tools reflect that same reality.

Frontline teams, however, need fast, **reliable answers in motion**, under real constraints, and frequently on shared or personal devices. If our tools do not reflect the conditions of their day, they will never truly support the work that keeps the business running.

The goal of this field visit is not to validate your employee app. It is to understand how your frontline app experience performs in real working conditions and whether it truly supports the people it was built for.

When you observe real work, you uncover:

- Information gaps
- Workarounds
- Friction points
- Trust issues
- Relevance problems

And that changes everything.



## WHAT ONE VISIT CAN UNLOCK

- **Identify where ROI truly lives.** Small efficiency gains among frontline teams create massive organizational impact.
- **Understand adoption barriers.** Technology is rarely the problem. Relevance is. If the app does not serve a daily need, it will not survive on a private phone.
- **Surface data quality gaps.** AI is only as good as your content foundation. Duplicate, outdated, or unstructured information weakens trust.
- **Preserve the human connection.** In a world increasingly driven by AI, frontline connection still depends on clarity, leadership visibility, and shared identity.

## HOW TO APPROACH THE DAY

**Enter with the right intent.** You are not there to defend your strategy. You are not there to promote features. You are there to see reality.

### BEFORE YOU GO:

1

#### Review data you already have

If you have an existing app, intranet, or portal, look beyond total downloads. Look for patterns.

Consider reviewing:

- Adoption rate by role, location, or department
- Monthly active users compared to total workforce
- Frequency of visits per user
- Most accessed tools or pages
- Content that receives little or no traffic
- Search analytics: top search terms, repeated searches, and zero-result searches
- Queries that indicate confusion (for example: searching “uniform” repeatedly across locations)

Search data is often one of the clearest signals of friction. What people search for reveals what they cannot easily find.

## 2

### If you don't have search or strong analytics yet

That is insight in itself.

Ask:

- Where do employees currently go when they have a question?
- Who do they ask?
- Is there a centralized place to search?
- Is information fragmented across tools, posters, managers, or messaging apps?

In this case, your field visit becomes your primary source of truth.

## 3

### Identify engagement gaps

Look for patterns such as:

- High downloads but low ongoing usage
- Operational tools used more than corporate news
- Certain roles or locations underrepresented
- Drop-off points in navigation

Analytics tell you what is happening. The field visit tells you why.

## CUSTOMER EXAMPLE

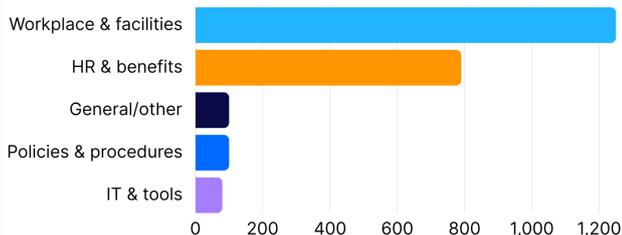
### What they found

- #1 search term = "uniform"
- Scattered information
- Policies differ by location and role

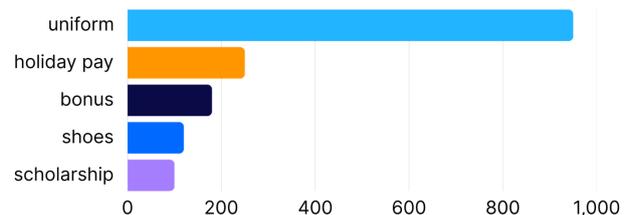
### The problem

- Employee searches "uniform"
- Finds generic policy
- Doesn't apply to their role or location
- Asks manager anyway

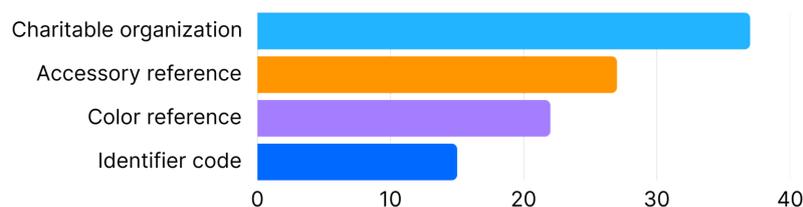
Search volume by category



Top 5 search terms (merged)



Detailed breakdown of "General/other" Top 4 sub-categories



## DURING THE VISIT:

- Spend time where real work happens
- Observe interruptions and repeated questions
- Sit beside employees, not across from them
- Bring coffee or lunch to create comfort
- Allow silence
- Listen more than you talk

Remember: Adoption is harder than technology. Relevance beats features every time.

## QUESTIONS TO ASK FRONTLINE EMPLOYEES

### OPERATIONAL REALITY

- What information do you look for most during your shift?
- What slows you down during the day?
- Where do you currently go to find answers?
- What messages are missing that would help you do your job better?

### APP EXPERIENCE

- Have you downloaded the app?  
Why or why not?
  - What would make this app essential for you?
  - What feels irrelevant or confusing?
- (If it lives on a personal device, why should it stay there?)

### CONTENT & DATA QUALITY

- Do you trust the information in the app?
- How do you know it is up to date?
- Have you ever found conflicting information?
- What do you ignore completely?

Clean, structured, curated knowledge builds trust. Raw volume does not.

### AI & THE FUTURE

- If you could ask the app one question and get an instant answer, what would you ask?
- Would you prefer asking a person or asking AI? Why?
- What would make you trust an AI-generated answer?

🌟 AI can increase efficiency. But if employees only talk to AI, the sense of “we” can slowly disappear.

The future is not AI versus human. It is AI that strengthens human connection.



## AFTER THE VISIT:

### BEFORE YOU REDESIGN ANYTHING

- Document recurring themes
- Separate assumptions from observed reality
- Identify one friction you can remove immediately
- Evaluate whether your data structure supports trustworthy AI
- Revisit your purpose statement

When your strategy is grounded in lived experience, your app becomes an operational advantage not just a communication channel.



### ABOUT THE AUTHOR

**Darin Gad** is a Senior Lead Designer at Staffbase with a Master of Fine Arts and a Master of Arts in Information Design. She reviews 300+ intranet and email designs each year and works closely with enterprise organizations to design email newsletters, employee apps, and intranet experiences, helping teams turn communication strategy into clear, high-impact digital experiences grounded in best practices. She's passionate about helping organizations connect their people and bring their communication goals to life.

## BRING POWER TO YOUR FRONTLINE

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