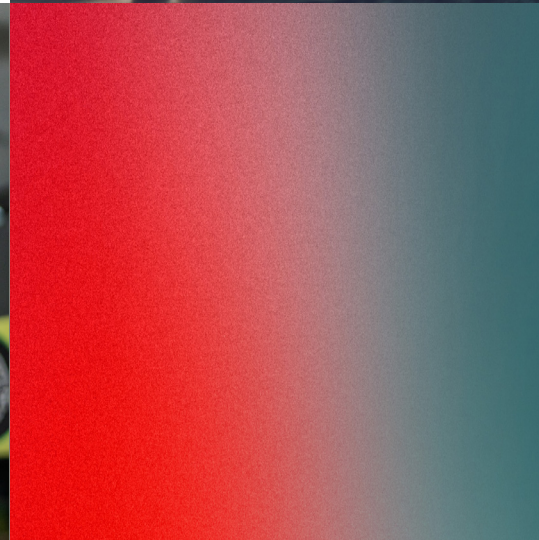
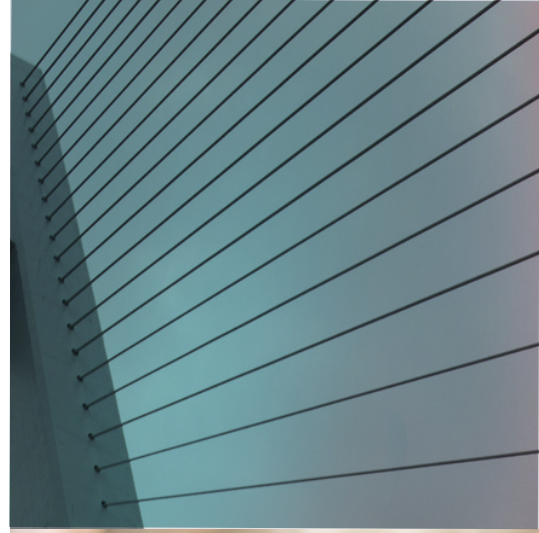




PEOPLE RESULTS

*Solutions For Your Workforce*

# 2025 Labor Activity in Retail Report



# About This Report

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The 2025 People Results Labor Activity in Retail Report includes the following:

An analysis of national, regional, and state representation petitions and elections (RC, RM, and RD)<sup>1</sup> as reported by the National Labor Relations Board (NLRB) during 2023 and 2024

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The Labor Law/Employee Engagement Update, which includes articles written by labor experts about relevant and timely labor issues impacting employers and the workplace

<sup>1</sup> See Appendix C for detailed definitions of the types of petitions and elections.



Dear Industry Colleagues,

In 2024, we saw a rise in union activity across retail. Not only was there an increase in representation petitions filed in the industry (+31 percent), but unions also won a majority of their retail elections with a 72 percent win rate.

This increase in activity is not surprising. In fact, it is expected as big-name retailers like Amazon and Starbucks continue to draw media attention and sway public opinion with their high-profile union elections.

These elections, as well as many others across the country, have highlighted common issues in retail—like high employee turnover, employee dissatisfaction, and concerns about workplace safety—but they have also shed light on a more recent phenomenon: that many retail workers are moving from more heavily unionized states, like California and New Jersey, to states with less risk for unionization, and they're bringing their pro-union views with them.

All of this is against the backdrop of a constantly evolving labor landscape where recent NLRB rulings have given more power to labor organizations and put more pressure on employers.

In late 2023, the NLRB overturned decades of federal labor law precedent with its decision in *Cemex Construction Materials Pacific, Inc.*, which announced a dramatic new framework for the union representation process. In the case of *Stericycle Inc.*, the NLRB adopted a new standard for how it will evaluate workplace rules and policies that are challenged on the grounds that they interfere with or restrict employees' rights to engage in protected concerted activity. The NLRB also changed its election process and reinstated expedited or "quickie" elections, which significantly shortened the timeline for union elections and added new requirements and restrictions for employers.

In 2024, these rulings put the onus on retailers to make sure they are effectively engaging with and actively listening to their employees. Proactive communication and strategic employee engagement strategies have proven more important than ever before when it comes to mitigating—and even eliminating—potential risks of unionization.

As you review this report, we encourage you to assess how your organization is proactively addressing employee concerns and engagement. Consider:

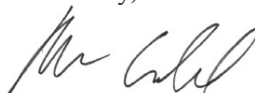
- Are your managers equipped to recognize and respond to early signs of workplace dissatisfaction?
- Do you have clear communication channels in place to ensure employees feel heard and valued?
- Are your policies and workplace practices aligned with the latest labor regulations to minimize risk?
- Does your workforce effectively and extensively use your employee listening processes?
- To what extent does your workforce provide input into the strategic and tactical decisions faced by your organization?
- How prepared is your organization to respond to organizing activity as well as the potential for an NLRB election?

Staying ahead in today's labor environment requires a strategic approach to employee relations. By prioritizing transparency, responsiveness, and engagement, retailers can foster a workplace culture that not only reduces the risk of unionization but also strengthens retention, satisfaction, and overall business success.

To help retailers continue to navigate this ever-changing labor landscape, we have included the latest data on union organizing and membership across the nation, as well as five timely labor and employee relations articles. People Results will be there with you as retail continues to adapt and evolve over the coming year.

We hope this report provides valuable insights to help you navigate these challenges. If you have any questions or would like to discuss tailored strategies for your organization, please don't hesitate to reach out. We look forward to continuing the conversation and supporting your efforts in building a resilient and engaged workforce.

Sincerely,



Mark Codd, Ph.D.

Vice President, Managing Director  
People Results

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# Executive Summary

## NLRB REPRESENTATION PETITIONS AND ELECTIONS<sup>2</sup>

In 2024, there were 187 representation petitions filed in retail, which is a 31 percent increase from the 143 petitions submitted in 2023.

Unions achieved a 72 percent success rate in the 131 representation elections held in retail in 2024. This was 7 percent higher than the 65 percent success rate in elections that took place in 2023.

Fifty-four percent of petitions in 2024 were filed in just seven states—California, Illinois, Massachusetts, Maryland, Michigan, New York, and Washington. These same seven states accounted for 42 percent of petitions filed in 2023.

The United Food and Commercial Workers (UFCW) remains the most active union in retail, accounting for 52 percent of all petitions filed and 53 percent of all elections held. UFCW was elected as a result of 72 percent (46) of the 64 elections they were involved in.

Over the past decade, most strikes in retail were held in New York, Illinois, California, Missouri, and Massachusetts. In 2024, there were 27 strikes held, idling a total of 24,919 workers.



<sup>2</sup> NLRB election data describes dynamic case activity that is subject to revision and corrections during the year, and all data should be interpreted with that understanding.

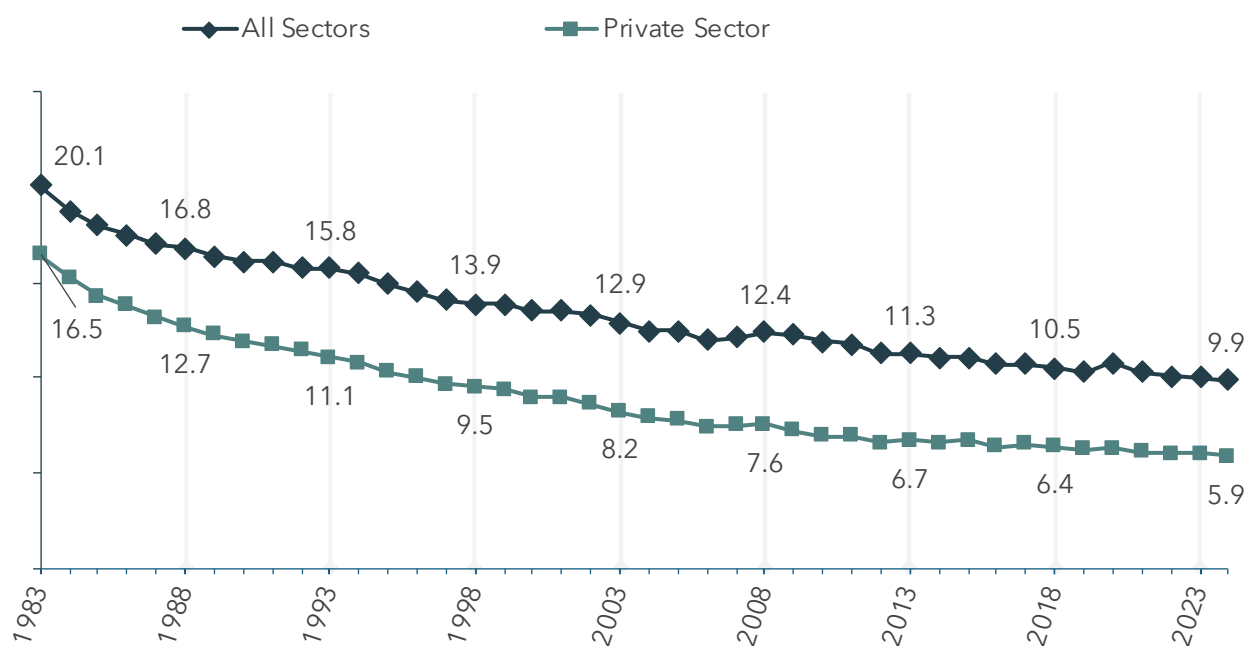
# Union Membership Nationwide

According to the Department of Labor (DOL) Bureau of Labor Statistics' Union Members – 2024 report, the percentage of unionized wage and salary employees decreased for the fourth year in a row to 9.9 percent—the lowest on record. This figure reflects a 0.1 percent decline from 10.0 percent in 2023. Additionally, the number of wage and salary workers who are members of unions experienced a minor decrease between 2023 and 2024.

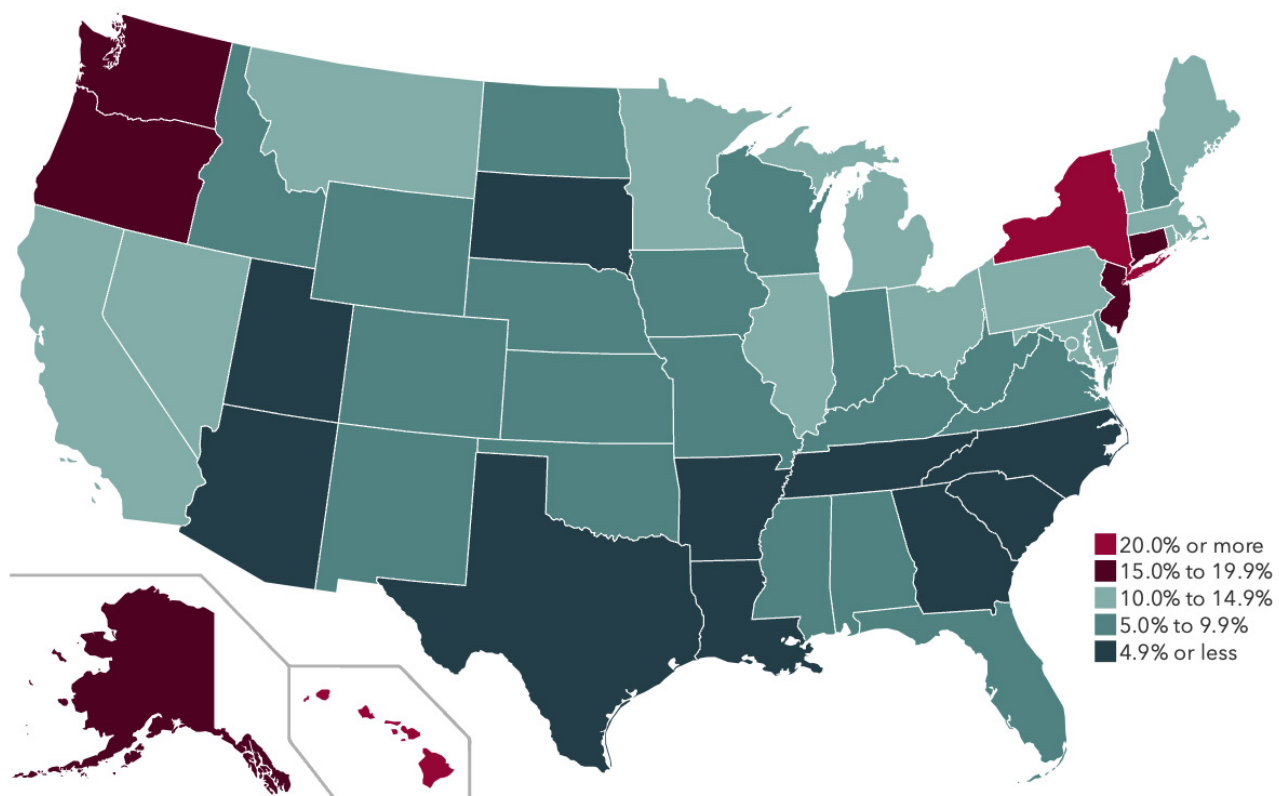
## DATA FROM THE DOL REPORT INCLUDES THE FOLLOWING HIGHLIGHTS:

- Public sector employees continue to be more than five times as likely to be members of unions as private sector employees (32.2 percent versus 5.9 percent, respectively)
- Black workers continued to have the highest union membership rate in 2024 (11.8 percent) followed by White workers (9.6 percent), Hispanic workers (8.5 percent), and Asian workers (8.5 percent)
- Thirteen percent of women workers aged 45 to 54 are more likely to be union members versus only 3.7 percent of women workers aged 16 to 24
- Among states, Hawaii maintains the highest union membership rate (26.5 percent) and North Carolina has the lowest rate (2.4 percent)
- Overall, union membership rates increased in 21 states and the District of Columbia, decreased in 24 states, and remained unchanged in 6 states

## UNION MEMBERSHIP RATE SUMMARY



## UNION MEMBERSHIP RATES BY STATE, 2024





# NLRB Petition and Election Results

## THIS SECTION INCLUDES THE FOLLOWING:

### National summaries

- Comparison of retail versus all non-retail representation election results
- Comparison of retail versus all non-retail decertification (RD) results
- Retail industry – Overview of elections
- Retail industry – Union successes in representation elections

### State summaries

- Most active states – representation petitions filed
- All states – representation petitions filed
- Most active states – representation election results
- All states – representation election results

### Union summaries

- Most active unions – representation petitions filed
- Most active unions – representation elections held
- Union success rates – representation election results

### Strikes in retail

- Strikes held by year in retail



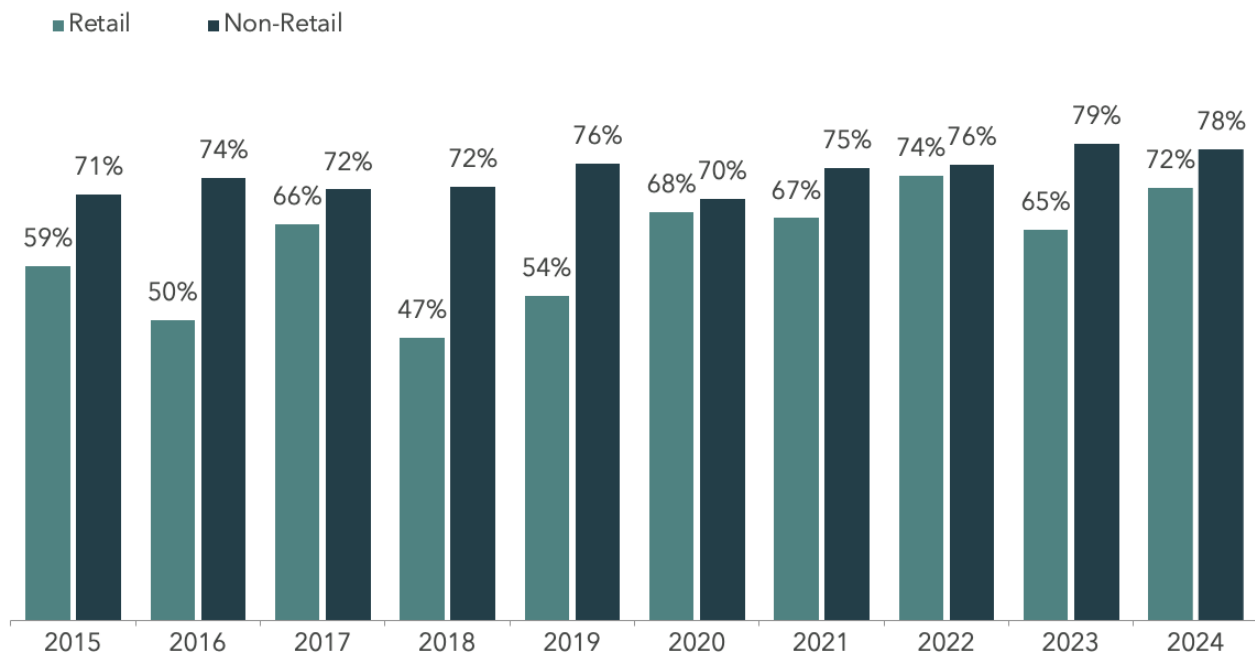


# National Summaries

The following information summarizes representation petition activity and elections held during the past decade as reported by the NLRB.

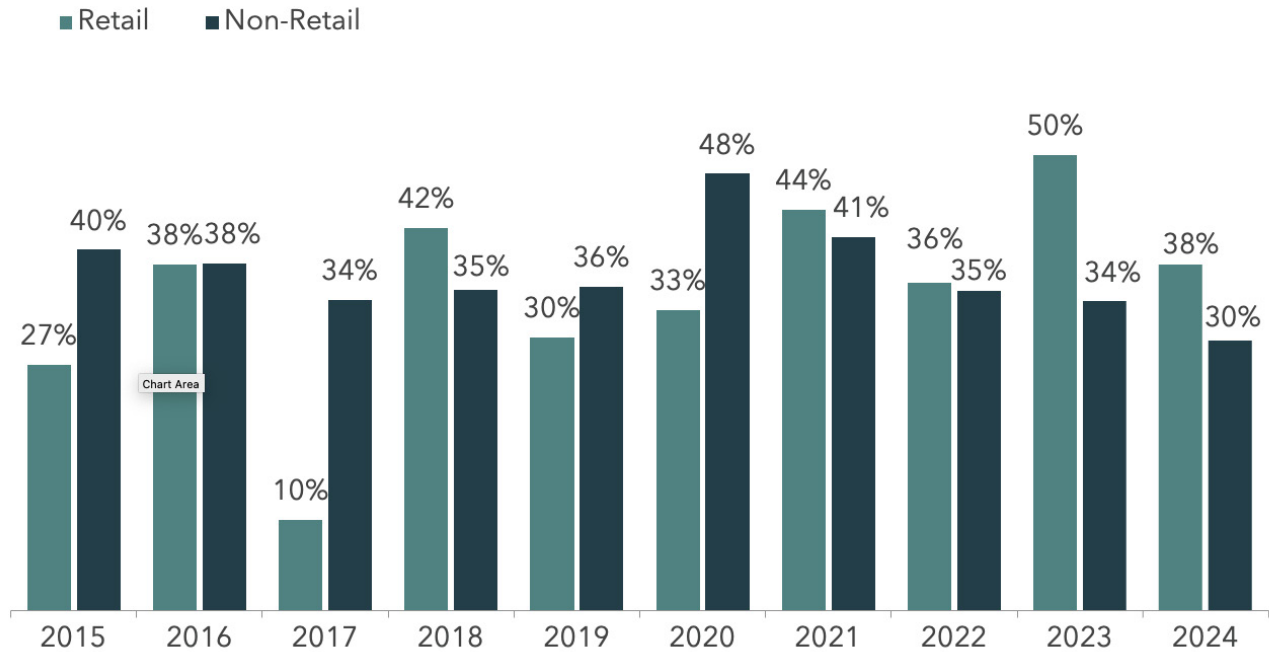
## UNION WINS IN REPRESENTATION ELECTIONS

Unions were elected as a result of 72 percent of representation elections held in 2024, 6 percent lower than the 78 percent win rate in non-retail industries. Between 2015 and 2020, unions in the retail space were, on average, less successful (17.8 percent less likely to win) than after 2020. Since 2020, the gap between successful retail and non-retail representation elections has shrunk to 6.4 percent. Retail unions appear to be gaining nearly as much success as non-retail unions.



## UNION WINS IN DECERTIFICATION ELECTIONS

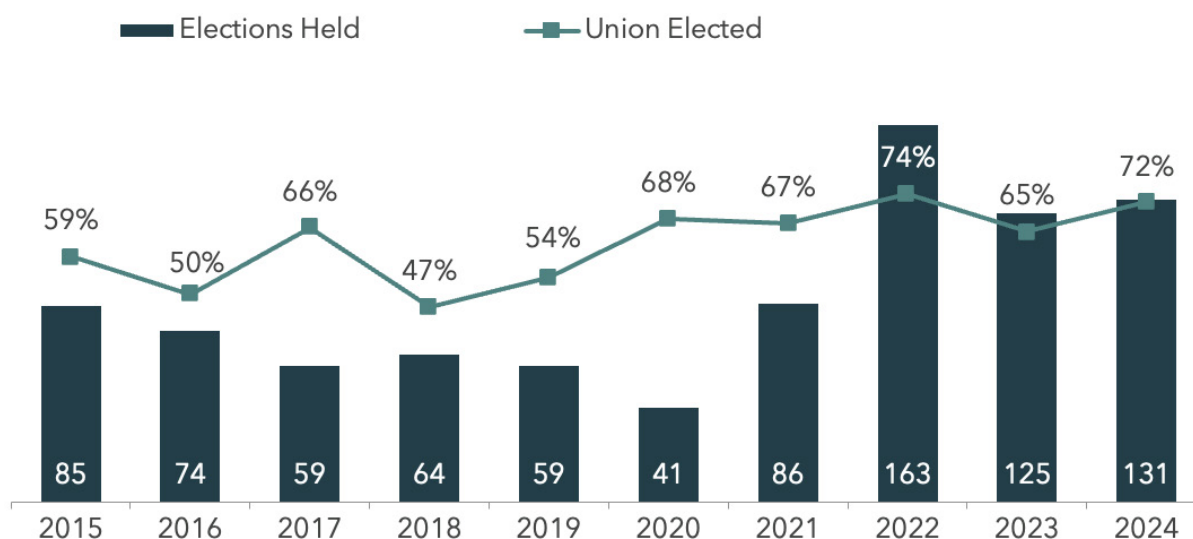
Over the past 10 years, on average, unions in retail environments won decertification elections 35 percent of the time (versus 37 percent for non-retail). In 2023, though unions won decertification elections at a rate that was a 10-year high (50 percent), the level of wins returned closer to the average at 38 percent in 2024.



## RETAIL INDUSTRY – ELECTIONS OVERVIEW

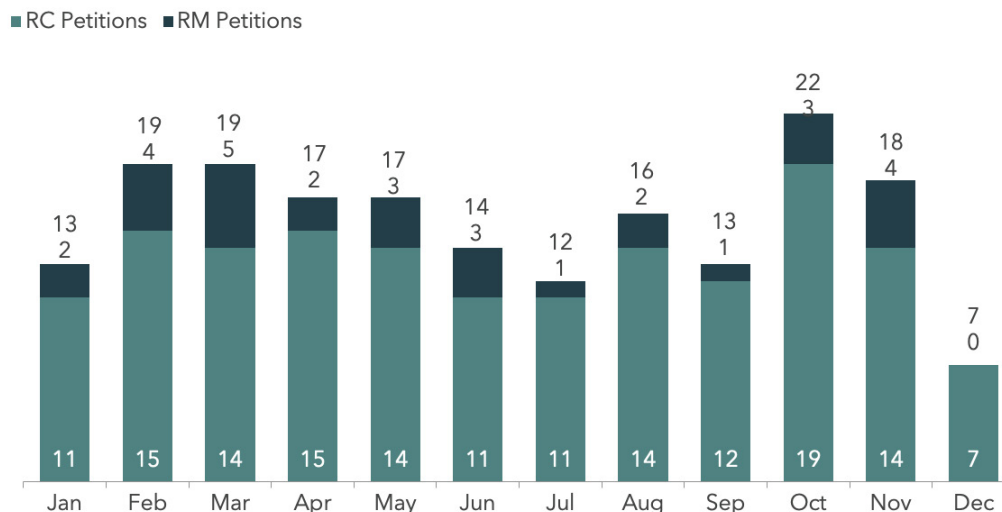
In 2024, 131 representation elections were held in retail. This was a less than 1 percent increase from the 125 elections in 2023. However, it was still 68 percent above the 10-year average of 89 per year. Unions were elected as a result of 72 percent of elections held in 2024 compared to 65 percent the previous year.

The increase in elections is due to several factors, including the national political landscape, younger workers' acceptance of unions being at a high level (88 percent favorable according to a 2023 AFL-CIO poll), and economic conditions forcing some workers to take roles in retail versus jobs or roles in industries with far fewer unions to encounter.



## CEMEX ALERT – RC VS. RM PETITIONS FILED<sup>3</sup>

Since the *Cemex* decision was issued on August 28, 2023, the composition of representation petitions filed has seen a slight shift, with more RM (Employer) petitions being filed. Throughout this report, a combination of RC (Certificate of Representative) and RM cases is used anytime we discuss representation petitions and elections.



<sup>3</sup> See Appendix C for detailed definitions of the types of petitions and elections.

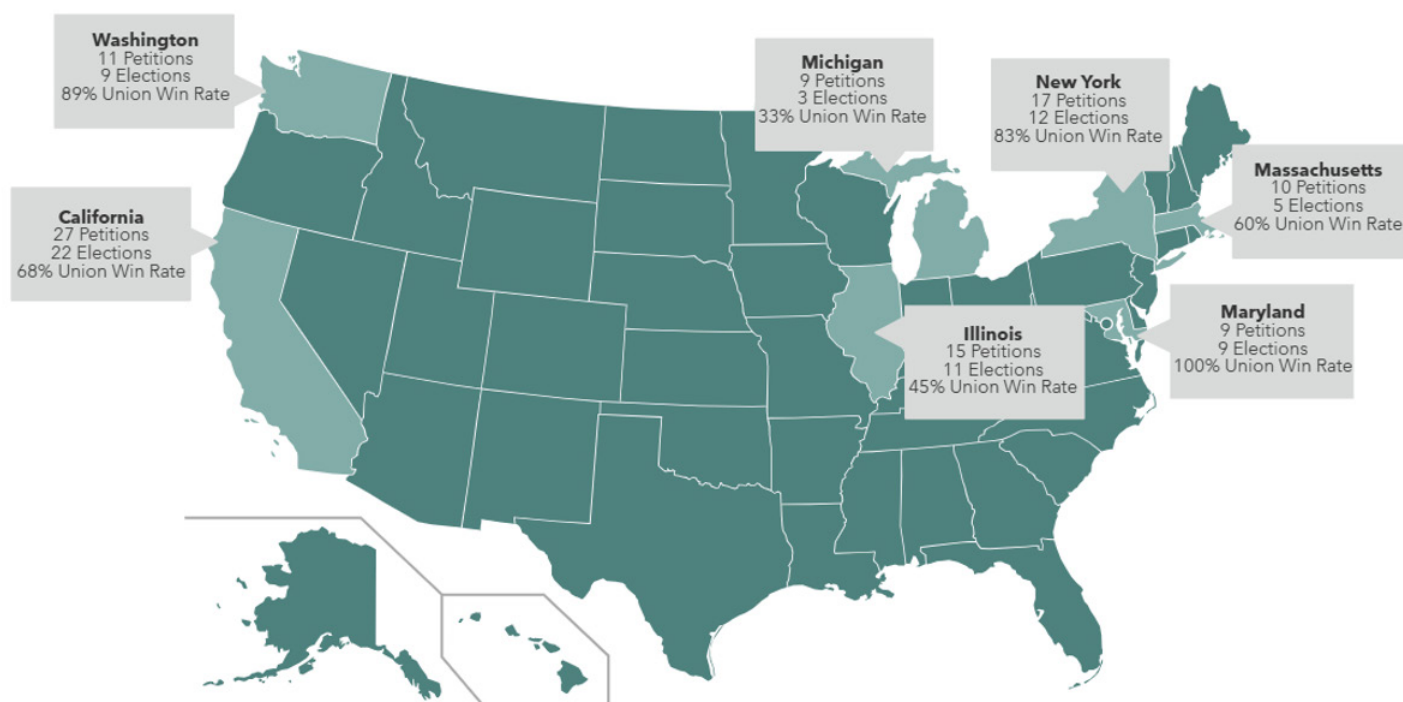


# State Summaries

This section provides an analysis of state-level organizing activity in retail and is based on representation petitions filed and representation elections held. The data includes all reported petitions and elections for 2023 and 2024 at the time of publication.

## MOST ACTIVE STATES – REPRESENTATION PETITIONS FILED IN RETAIL

In 2024, 54 percent of all representation petitions filed were in just 7 states—California, New York, Illinois, Washington, Massachusetts, Maryland, and Michigan. These same 7 states accounted for 42 percent of representation petitions filed in 2023.



**ALL STATES – REPRESENTATION PETITIONS FILED IN RETAIL**

The table below details the number of representation petitions filed in each state during 2023 and 2024. States are not included in the table if no petitions were filed in either year. There were significantly more petitions filed in 2024 than in 2023.

State	2023	2024	State	2023	2024	State	2023	2024
Alaska	-	2	Maine	-	1	Oklahoma	2	2
Arizona	-	3	Maryland	1	9	Oregon	13	7
California	18	27	Massachusetts	4	10	Pennsylvania	5	7
Colorado	1	2	Michigan	1	9	Rhode Island	-	7
Connecticut	-	2	Minnesota	3	3	Texas	1	4
DC	1	-	Missouri	12	8	Utah	1	-
Georgia	1	-	Nebraska	-	1	Vermont	2	-
Hawaii	-	1	Nevada	3	6	Virginia	1	-
Idaho	10	3	New Jersey	8	6	Washington	5	11
Illinois	15	15	New Mexico	-	2	West Virginia	-	1
Indiana	3	6	New York	16	17	Wisconsin	1	3
Kansas	3	-	North Carolina	1	2	Washington	11	12
Kentucky	4	2	Ohio	7	8	West Virginia	2	2
Iowa	2	-	North Carolina	2	5	Wisconsin	-	3
Kansas	-	1	North Dakota	1	2	<b>Total</b>	<b>143</b>	<b>187</b>

## ALL STATES – REPRESENTATION ELECTION RESULTS IN RETAIL

The following table depicts the number of representation elections held in each state in retail in 2023 and 2024. States are not included in the table if no elections were held in either year.

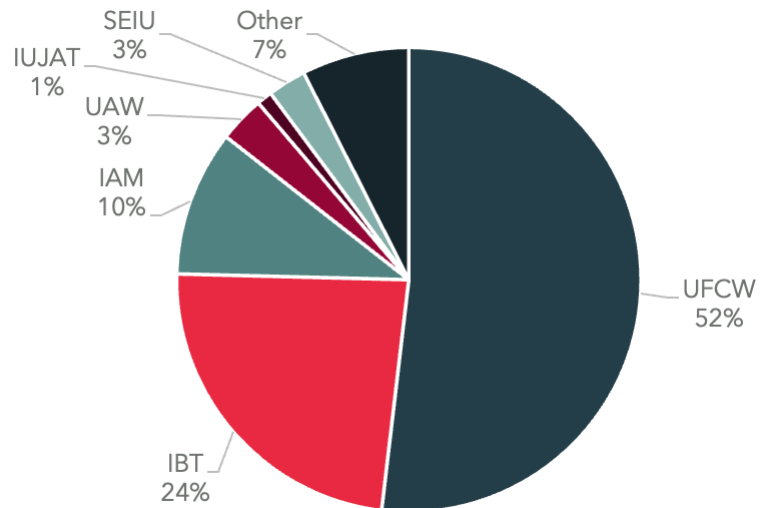
State	2023					2024				
	Total	Union Wins	% of Elections	Union Losses	% of Elections	Total	Union Wins	% of Elections	Union Losses	% of Elections
Arizona	1	0	0%	1	100%	1	1	100%	0	0%
California	12	9	75%	3	25%	22	15	68%	7	32%
Colorado	1	0	0%	1	100%	1	0	0%	1	100%
Connecticut	-	-	-	-	-	1	1	100%	0	0%
District of Columbia	1	1	100%	0	0%	-	-	-	-	-
Hawaii	1	1	100%	0	0%	1	1	100%	0	0%
Idaho	9	8	89%	1	11%	2	1	50%	1	50%
Illinois	13	11	85%	2	15%	11	5	45%	6	55%
Indiana	3	1	33%	2	67%	3	2	67%	1	33%
Kansas	2	2	100%	0	0%	-	-	-	-	-
Kentucky	4	3	75%	1	25%	1	1	100%	0	0%
Maine	-	-	-	-	-	1	0	0%	1	100%
Maryland	2	1	50%	1	50%	9	9	100%	0	0%
Massachusetts	3	1	33%	2	67%	5	3	60%	2	40%
Michigan	2	1	50%	1	50%	3	1	33%	2	67%
Minnesota	2	2	100%	0	0%	2	1	50%	1	50%
Missouri	6	4	67%	2	33%	5	4	80%	1	20%
Nevada	3	3	100%	0	0%	2	2	100%	0	0%
New Jersey	6	3	50%	3	50%	4	4	100%	0	0%
New York	14	9	64%	5	36%	12	10	83%	2	17%
North Carolina	-	-	-	-	-	1	1	100%	0	0%
Ohio	6	3	50%	3	50%	5	3	60%	2	40%
Oklahoma	-	-	-	-	-	2	2	100%	0	0%
Oregon	20	11	55%	9	45%	4	3	75%	1	25%
Pennsylvania	6	3	50%	3	50%	4	2	50%	2	50%
Rhode Island	-	-	-	-	-	7	7	100%	0	0%
Texas	1	1	100%	0	0%	2	0	0%	2	100%
Utah	1	1	100%	0	0%	-	-	-	-	-
Vermont	1		0%	1	100%	-	-	-	-	-
Virginia	2	1	50%	1	50%	-	-	-	-	-
Washington	4	1	25%	3	75%	9	8	89%	1	11%
West Virginia	-	-	-	-	-	1	1	100%	0	0%
Wisconsin	1	1	100%	0	0%	-	-	-	-	-
Total	127	82	65%	45	35%	121	88	73%	33	27%
Texas	2	0	0%	1	100%	9	6	67%	3	33%
Utah	1	0	0%	2	100%	1	0	0%	1	100%
Vermont	-	0	0%	1	100%	1	0	0%	1	100%
Virginia	4	1	50%	1	50%	4	3	75%	1	25%
Washington	13	10	91%	1	9%	9	6	67%	3	33%
West Virginia	2	0	0%	1	100%	2	2	100%	0	0%
Wisconsin	1	0	0%	1	100%	2	1	50%	1	50%
Total	116	54	51%	52	49%	152	89	59%	63	41%



# Union Summaries

## MOST ACTIVE UNIONS – REPRESENTATION PETITIONS FILED IN RETAIL

UFCW remained the most active union in retail in 2024. It accounted for over 50 percent of petitions filed.

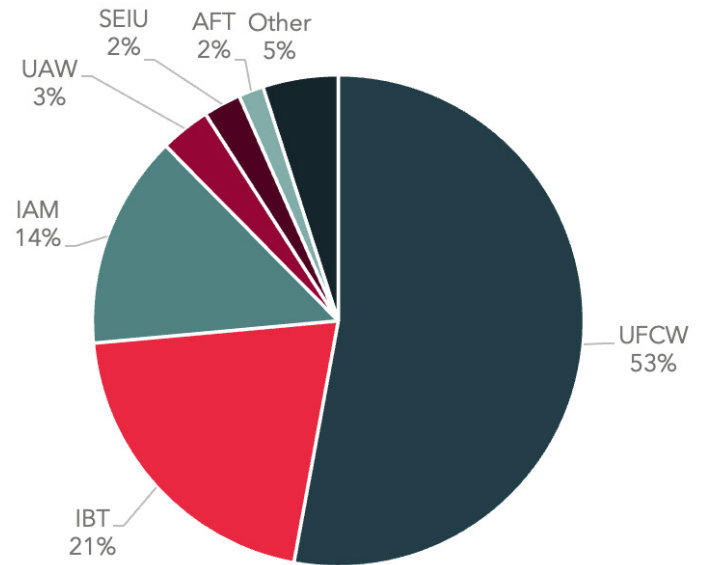


## MOST ACTIVE UNIONS – REPRESENTATION PETITIONS FILED IN RETAIL

Abbreviation	Union Name	Petitions Filed	
		2023	2024
UFCW	United Food and Commercial Workers International Union	70	97
IBT	International Brotherhood of Teamsters	21	44
IAM	International Association of Machinists	13	20
UAW	United Automobile, Aerospace and Agricultural Workers of America	4	6
SEIU	Service Employees International Union	3	5
IUJAT	International Union of Journeymen and Allied Trades	4	2

## MOST ACTIVE UNIONS – REPRESENTATION ELECTIONS HELD IN RETAIL

UFCW continues to dominate the unions in retail, accounting for 53 percent of the elections held in 2024. UFCW won 46 of 64 elections (a 72 percent success rate).



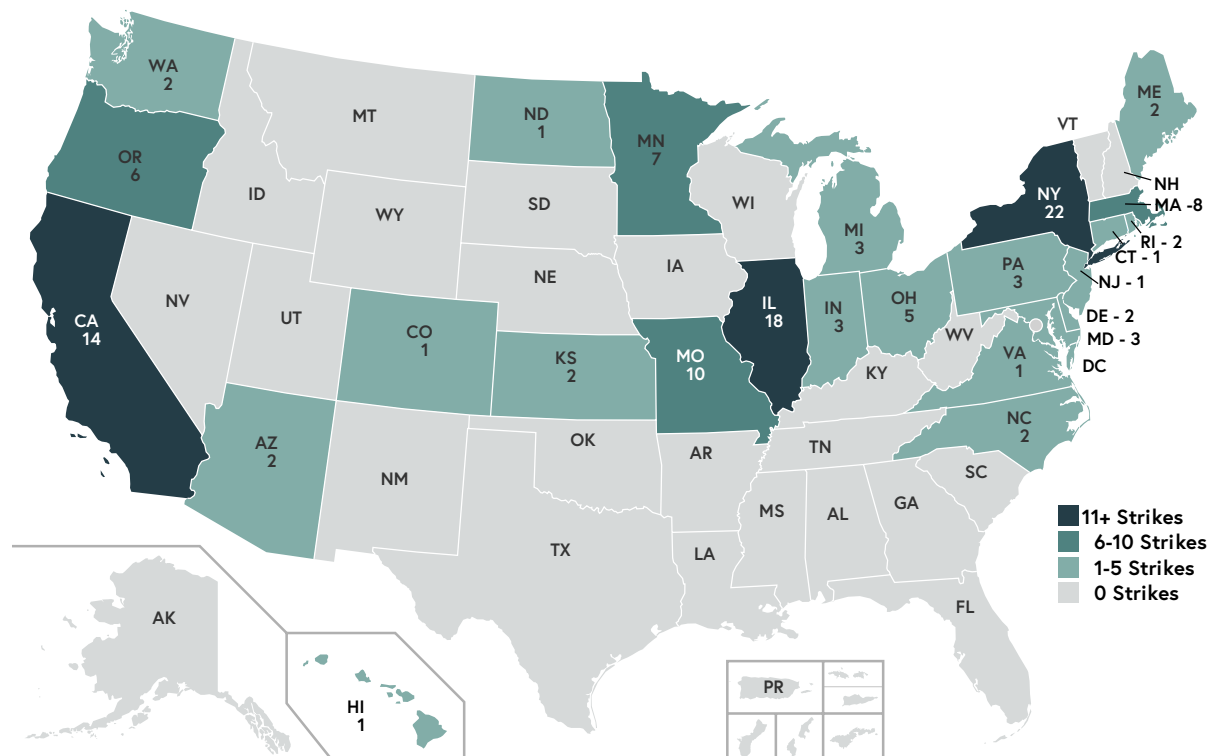
## MOST ACTIVE UNIONS – REPRESENTATION ELECTION RESULTS IN RETAIL

	2023			2024		
	Total Elections	Union Elected %	Union Not Elected %	Total Elections	Union Elected %	Union Not Elected %
UFCW	61	66%	34%	64	72%	28%
IBT	21	71%	29%	25	76%	24%
IAM	9	56%	44%	17	76%	24%
UAW	2	100%	0%	4	50%	50%
SEIU	3	67%	33%	3	100%	0%
American Federation of Teachers (AFT)	0	-	-	2	100%	0%

# Strikes in Retail

## STRIKES IN RETAIL BY STATE, 2015–2024

The map below illustrates the number of strikes in retail in each state since 2015.<sup>4</sup> Strike activity is heavily concentrated in four states: California, Illinois, Missouri, and New York.



## STRIKES IN RETAIL BY STATE, 2015–2024

Year	Number of Strikes	Workers Idled	Average Number of Workers per Strike
2024	27	24,919	923
2023	29	2,086	72
2022	13	10,447	804
2021	12	9,766	814
2020	9	1,144	127
2019	10	33,157	3,316
2018	3	297	99
2017	11	2,531	230
2016	3	100	33
2015	5	668	134

<sup>4</sup> Strike data is compiled from a combination of Federal Mediation and Conciliation Services Work Stoppage Data, U.S. Bureau of Labor Statistics Major Work Stoppages Data, and media coverage of strikes to provide the most complete data possible. The data may not be comprehensive.



# Labor Law/Employee Engagement Update

## Article Summaries

### Employee Listening: A Continuous Pursuit From Recruitment to Retention

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By William T. Hamrick, Director, Labor Relations Group, Publix Super Markets, Inc.

Employee listening is a critical practice that can significantly enhance organizational outcomes and employee engagement. Listening can take many forms, including surveys, interviews, focus groups, and one-on-one conversations, and it should be a priority throughout the employee lifecycle. Organizations should act on employee feedback quickly and close the loop by communicating how the organization will respond—further building trust and demonstrating that employee voices are valued. Recognizing the importance of listening, while also paying attention to what your employees are listening to, is especially important in environments with active organized labor.

### Proactive Communication in Retail: Shape the Narrative and Positively Impact Employee Engagement

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By Kurt Mika, Lead Consultant, Labor Relations, People Results

High turnover rates, a diverse employee population, and logistical barriers make communicating in a retail environment particularly challenging. These factors can also lead to “transmission chaining,” where information becomes distorted as it is passed down through an organization. To combat this, companies should employ proactive communication—communication that is shared intentionally and with employees’ needs in mind. Proactive communication does not include only organizational updates, but also messages that share the organization’s story and engage employees in its mission. Failure to communicate proactively may lead employees to adopt a narrative influenced by outside parties, including unions, which is especially concerning in a climate like retail where union win rates are surging.

## Unlocking the Hidden Power of Employee Surveys: How Segmentation Can Transform Retail Workforce Strategies

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By Jennifer Beck, Consultant, Research and People Analytics, People Results

Employee surveys are vital modern tools used to measure engagement, satisfaction, and overall workplace sentiment. However, many organizations, particularly in retail, struggle to fully leverage data generated by these surveys. This article emphasizes the benefits of applying advanced segmentation techniques to existing survey data, allowing human resources (HR) professionals to unlock deeper, more actionable insights. This approach fosters proactive interventions, enhances engagement strategies, and supports data-driven decision-making. By leveraging these techniques, retail organizations can transform their survey data into a powerful tool for workforce optimization and business success.

## Understanding Retail Unionization: What HR Professionals Need to Know

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By Mark Codd, Ph.D., Vice President and Managing Director, People Results

Retail human resources (HR) professionals are increasingly recognizing the growing interest in unionization among their workers, even at companies with historically strong employee relations. To navigate this landscape, HR professionals can utilize publicly available resources from the Department of Labor's Office of Labor-Management Standards (OLMS), which includes labor management reports, IRS Form 990 filings, and labor union constitutions and bylaws. These resources can aid in educating employees about union operations and membership implications.

## Using Change Management to Navigate Business Transformation and Mitigate Labor Challenges

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By Kirsten Jordan, Lead Consultant, People, Organization, and Change, People Results

Change management, or managing the employee side of change, is critical in guiding organizations from their current state to a desired future state. Effective change management helps an organization plan for the possible outcomes of a change in advance and encourages organizations to be fully transparent with employees, helping them to get onboard with the change. It also helps to mitigate labor issues by building trust with employees and improving employee engagement. By implementing successful change management strategies, businesses can leverage improvements in policy, process, and technology, while creating a skilled, resilient workforce and a culture adept at handling change.



# Employee Listening: A Continuous Pursuit From Recruitment to Retention

By William T. Hamrick, Director, Labor Relations Group,  
Publix Super Markets, Inc.; [william.hamrick@publix.com](mailto:william.hamrick@publix.com), 863-688-1188  
With input from Emily Burnett, Josh Knox, and Jennifer Pearson

## Manager-Subordinate Listening

Listening, there should be no simpler task. Simply focus on the individual across from you who is trying to share something with you. When asked about the types of listening, a sample of 200 adults listed features, characteristics, and groupings for 4 distinct types of interpersonal listening: general, romantic, colleague-to-colleague, and manager-subordinate (Lipetz, Kluger, & Bodie, 2020). Each type includes its own setting, mood, and critical elements.

The fact that the average person recognizes and highlights the uniqueness of manager-subordinate listening is telling. Managers need to recognize the distinct implications their communication may have when the person across from them, whether in-person or virtually, is their employee (Qin, 2024).

That person may need guidance, motivation, action, a decision, an opportunity to inform the manager of an alteration to an agreed-upon plan, or to share their opinion on an issue. Or they may be doing something more critical. They may be trying to connect. This latter moment usually happens only once, and it is the manager's opportunity to listen and begin the process of forming a bond of trust and commitment that may last years. Listening first is the agreement in communicating. It tells the other person that their feelings, opinions, and interests are important enough for you to stop and listen to them. First you listen; later you share. This is a moment of either critical managerial success or failure.



Doug Conant, former CEO of Campbell Soup once said, “To win in the marketplace, you must first win in the workplace.” Richard Branson said “Clients do not come first. Employees come first. If you take care of your employees, they will take care of the clients.” Andersen (2019) found that managers’ actions are the antecedent to trust, and this trust developed in differing degrees depending on level of trust in subordinates, offers of help and guidance, displays of appreciation, and their ability to solve problems adequately. Manager proximity to subordinates and their willingness to listen to them were key factors in their relationship. Adding to this, Krot & Lewicka (2012) found organizational trust is an important part of professional relationships between co-workers, between managers and employees, or between employees and managers, and that trust can be either interpersonal or institutional in nature.

For their part, employees’ listening habits impact their work team and their personal achievement. Itzchakov & Kluger (2017) estimated that non-supervisory employees spend about 30 percent of their time listening, while managers spend about 60 percent of their time listening. Given the small percentage of your team’s output that you actually produce, it should be evident that the ability to provide motivation, clarity of mission, alignment, and an environment of easy rapport as it relates to guidance, presently and into the future, should be of paramount importance for managers and organizations alike. Listening is a key relational human resource practice that can improve a myriad of human resource outcomes as well as relatedness to colleagues, burnout, and turnover intentions; however, it is oftentimes overlooked as a managerial competency (Itzchakov et al, 2023). When successful, an organization’s listening environment itself is used by employees to interpret organizational information and translate signals into meaning and relevance which culminates in identification with, and commitment to, the organization (Reed, Goolsby, & Johnston 2016).

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### The Consequences of Employee Silence

Conversely, employee silence is a barrier to organizational success. Defined as a “conscious withholding of information; opinions, suggestions, or concerns about potentially important organizational issues” (Morrison & Rothman, 2009), employee silence can be deadly for an organization. It entails a deliberate decision by employees to withhold communication of their opinions from their manager and the organization. These can range from simple work-related misunderstandings and problems to the withholding of information, concerns, suggestions, and grievances (Morrison & Milliken, 2000; Tangirala & Ramanujam, 2008). Notably, as employee voice frequently involves expressing opinions that are contrary to the organization’s existing direction and can therefore disrupt the organizational equilibrium, many organizational leaders are unwilling to listen to employee voice (Shahinpoor & Matt, 2007). When this is perceived by employees, the value of their diverse perspectives and opinions on organizational culture and strategic advantage is lost, with grave implications. Also notable is that employees of differing demographics hold different perspectives on their manager’s and organization’s listening practices, with women less likely to perceive that their organizational leaders listen to them compared to men (Neill & Bowen, 2021).

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### Forms of Employee Listening

Employee listening is the practice of gathering feedback from employees to better understand their opinions, needs, and expectations. A study by Qin & Men (2021) found employee perceptions of internal organizational listening were positively associated with employees’ perceived relationships with their organization. This listening can take many forms; some of the most common include surveys, interviews, focus groups, hotlines, and one-on-one conversations. These forms of employee listening are associated with a host of

positive employee outcomes, such as increased job performance, organizational citizenship behavior, job satisfaction, and well-being (Kluger & Itzhakov, 2022). Additionally, organizations with a robust employee listening program are more likely to meet financial goals, maintain excellent customer satisfaction, and retain top talent (Killham, 2024). Most importantly, the practice of employee listening is the foundation for building a trusting relationship between employee and employer. Listening to your employees tells them that what they say is important, and this leads to trust (Martínez-Tur, 2020) (and reciprocity of trust), which is foundational for high-performing teams. Some organizations use surveys to ask about employee feelings regarding the work environment, managers, coworkers, etc. Whether a long-standing practice for your organization, or something new, surveying is a unique way to obtain input from all, not just the “squeaky wheels.” Just as with a secret ballot election, each employee should be given a private opportunity to provide their thoughts and opinions, and with the rise of text analytic services, employers can utilize open-ended items to gather input on topics they have not even considered to be important. Programs from Kapiche, Qualtrics, Alchemer Pulse, and others use theme extraction, sentiment analysis, and entity recognition to provide valuable insight for employers, many times for things the employer never thought to ask about.

### Employee Listening Competencies

Kang & Moon (2024) found eleven themes or competencies for effective listening for managers and organizations; these comprise an excellent analysis of themes and competencies for those refining an existing employee listening program.

- Being open-minded: organizations do not know everything
- Being fair: listen to all
- Being transparent
- Acknowledging employees as legitimate partners
- Being supportive of employee voice

- Being proactive
- Perspective-taking
- Making voicing easy
- Investing time and resources to listen
- Giving transparent feedback and doing follow-ups
- Responding with meaningful and actionable results

### Listening Throughout the Employee Lifecycle

Simplified practices for those considering starting an employee listening program include listening throughout the employee lifecycle, taking action, getting feedback to leaders quickly, and closing the loop. Listening throughout the employee lifecycle means recognizing that employees will have unique needs at different points in their employee lifecycle. Early in the employee lifecycle (recruitment, hiring, and onboarding) is a critical time to set the expectations of new employees, assimilate them into the organizational culture, and get them up to speed to become productive members of the company. Later, regular contact with employees throughout their career via mechanisms such as regular surveys can function as a tool to connect with employees across the organization and gather their feedback about their job satisfaction, training needs, their relationship with their manager, and any other aspects of their employee experience. Leaders should also be actively seeking feedback from employees at an individual level through one-on-one or small group discussions. “Passive listening” through analyzing employee posts on social media can be a temptation; however, research suggests the validity of content on social media is extremely poor, due to the prominence of identity curation, bots, corporate campaigns, and other sources of error (Conrad et al, 2021). Other programs, such as ethics hotlines, suggestion boxes, and open-door policies can be available to

employees throughout their career lifecycle and can provide another avenue for employees to deliver their feedback to the organization. Finally, when employees are ready to leave the organization, valuable information can be gathered in the form of exit surveys or exit interviews.

### Acting on Employee Feedback and Closing the Loop

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Taking action once feedback is gathered is critical. Employers who do not act based on employee feedback will erode employee trust in the organization and reduce employees' motivation to provide feedback in the future. Put succinctly, if you ask and they tell you, do something with the information. On a related note, do not ask about something you are not willing to change. Lastly in this vein, remember you are representing the organization, what you ask about will signal to the recipients what you are interested in, and/or what is important to you; therefore, you communicate as much as you gather when surveying.

This valuable employee feedback, though, is useless if it does not get to the leaders who can use the information for the betterment of the organization. Executive-level leaders need employee feedback when making company-wide decisions, but lower-level managers and supervisors also need employee feedback to address specific concerns within their departments. It is critical that employee feedback data be distributed to all company leaders with the appropriate level of specificity to allow leaders to use this information at all levels of the organization. Employee listening data goes stale quickly, so the sooner the information can be passed on to business leadership, the sooner those leaders can use the information to make just-in-time business decisions. Showing this sense of urgency around employee listening will also communicate to employees that their feedback is valued.

Lastly, closing the loop is an often-forgotten component in employee listening programs. "Closing the communication loop" means communicating back to those employees 1) a summary of what was learned from the feedback and 2) what actions

will be taken in response to the feedback. This demonstrates to employees that their employer was listening, values their feedback, and respects their employees enough to provide this information back to them. This practice helps to create a culture of transparency and trust in the organization and encourages employees to continue to engage with their employer, bring forward their best ideas, and open up about their concerns. Whether the feedback is solicited from a survey, one-on-one discussion, or another approach, the organization must prioritize follow-up communication.

### Employee Listening in a Union Environment

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A few additional concepts are important to the extent an organization's employee listening interests occur in an environment where organized labor is present and active. In these situations, it is essential to understand the climate within your market sector as issues affecting your peers could come to your doorstep as well, and your employees will certainly become aware of events at your competitors. Your employees are likely to see these changes and compare them to their own work environment; their reactions should be noted, and you should also be aware of these external messages. Employers need to listen to their employees, as well as what their employees are listening to. While the content on social media may not be valid, an employer should be aware of what their employees are seeing so they can be prepared to share the organization's position. It should also be noted that training programs to help managers be better listeners do appear to have validity and ROI. One study by Itzchakov, Weinstein, & Cheshin (2023) found that receiving listening training was linked to higher feelings of relatedness with colleagues, lower burnout, and lower turnover intentions.

## Conclusion

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Employee listening must be viewed through multiple lenses and should be a continual process. Employee listening begins in the stage of recruitment and should be carried on throughout the employee lifecycle within the company. Listening to your employees in a free and open environment is a privilege that an organization should recognize and appreciate; failing to do so could lead to a time when they no longer have the free ability to do so.



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# Proactive Communication in Retail: Shape the Narrative and Positively Impact Employee Engagement

By Kurt Mika, Lead Consultant, Labor Relations, People Results

## Introduction

In today's information-driven workforce, the consistent and thoughtful use of proactive communication has never been more important. Communication is proactive when information is shared intentionally and with employees' needs in mind. Communicating proactively allows employers to engage with their workforce in a way that inspires, builds trust, and mitigates risk—ultimately allowing employers to establish themselves as a trust-worthy, reliable source of information.

Nowhere is proactive communication more important than in the world of retail, which is made up of a diverse group of workers, from teenagers entering the workforce to seniors supplementing retirement income. Workers aged 16 to 34 make up the largest share of the retail workforce, accounting for around half of all employed retail workers. Plus, there is a fairly even distribution between genders and among part-time and full-time workers.<sup>1</sup>

Moreover, many retail workers relocate from union-friendly states like New Jersey, Illinois, New York, California, and Massachusetts to states typically less at risk for third-party representation, including West Virginia, South Carolina, North Carolina, Alabama, and Arkansas<sup>2</sup>—potentially bringing with them different viewpoints and, specifically, more pro-unionization views.

## Why Companies Overestimate the Effectiveness of Their Workplace Messaging

The unique makeup of the retail workforce, as well as the logistical barriers inherent to retail (for example, employees needing to communicate across large warehouses or workspaces), along with high turnover rates in retail (3.8 percent

compared to the national average of 3.3 percent<sup>5</sup>), can make communication incredibly challenging. These factors can also lead to what is known as “transmission chaining” in the workplace.

Transmission chaining refers to the process whereby information becomes distorted or misinterpreted as it is passed from one individual to another. Think of this like a game of “telephone,” where one person whispers a phrase into another’s ear. By the time the phrase reaches the last person, the message may not resemble the original phrase. This is the reality for many retail employers that struggle to clearly communicate key messages to diverse groups that, for various reasons, may receive or interpret the information differently.

Companies may think their message is effectively reaching all employees; however, the original message may be lost by the time it trickles down the organization. For example, executives may share information with directors, who then pass it on to managers, who relay it to supervisors, who, finally, share it with employees. This type of top-down communication is common, though it often results in a loss of message or misinterpretation by the audience. What leadership thinks its communicating and what employees actually hear or experience may not always align. Without actively seeking employee feedback and consistently measuring engagement, leadership may be unaware of gaps in communication or areas where the workplace culture is not as strong as perceived.

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### Proactive Communication in Action

To make proactive communication a standard practice, companies should ensure messaging is clear, consistent, and delivered through multiple channels—from team meetings or huddles to digital updates—reducing the likelihood of transmission chaining. Leadership should be visible and accessible, engaging with employees and reinforcing messages through forums like regular check-ins and town halls.

Being proactive also means encouraging two-way communication through feedback channels, open discussions, and direct interactions. Not only does this allow employers to ensure their intended message is being received and to respond and adjust their message accordingly, but it also makes employees active participants in the organization’s success. When employees feel involved, they’re more likely to stay committed, be productive, and contribute to a positive work culture—and are less likely to seek third-party representation.

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### Shaping the Narrative

Employers may sometimes feel there’s nothing to share, but that’s rarely the case. Consistent communication with employees is key. Proactive communication goes beyond organizational updates. Yes, it includes reminders about important events like benefits open enrollment, but it also includes educating employees about lesser-known benefits and services you offer, such as wellness programs, education reimbursement, or other employee perks.

Other examples of proactive communication include spotlighting success stories or new company initiatives, recognizing achievements, celebrating milestones, and offering simple messages of appreciation. It also includes messages from leaders that reinforce company values or highlight the company’s mission. With effective, proactive communication, employees will not only be informed, but will feel inspired, included, and connected to the mission.

Being a great organization isn’t enough—you must tell your story and clearly define your “employee value proposition,” making it clear to employees what makes your company special, why their work matters, and how they benefit from being part of the team. Make it an ongoing conversation—not a one-time announcement.

Remember, if you don't fill the information gap, someone else will. If you're not actively highlighting the advantages of working for your organization, employees may hear a different narrative, whether from another employer or a third party like a union.

### Engaged Employees Boost Customer Satisfaction

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Many organizations—including those in retail—spend a lot of time and money to determine the best way to increase their customer satisfaction while overlooking a very important part of the equation: their own employees. This can be a crucial oversight because research shows that happy and engaged employees are more likely to boost customer satisfaction and, in turn, boost sales and revenue.

This can be seen in the way employees interact with customers. A happy and engaged employee may be more motivated and interested in spending time with a customer, asking them questions, understanding their unique needs, and providing personalized recommendations that ultimately lead to an increase in purchases and sales.

In fact, data shows that teams with high levels of employee engagement—defined by Gallup as “the involvement and enthusiasm of employees in their work and workplace”<sup>4</sup>—are 23 percent more profitable than those with low engagement. They also report 18 percent higher productivity.<sup>5</sup>

### Conclusion

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Proactive communication enables retail employers to shape the narrative and foster meaningful engagement with their employees. Proactive communication not only cultivates a more engaged, connected, and productive workforce, it leads to better customer experiences and stronger business results. Finally, it strengthens the organization against external influences, such as unions.

Unions often target employers that fail to communicate effectively and employees who feel undervalued within their organization. The battle for workplace influence is an important one,

which is why it's no surprise that unions have turned their attention to retailers and are raking in wins. Consider the overall win rate of unions in representation elections in 2024 compared to a decade ago: 72 percent versus 59 percent, respectively. Union win rates trended upward in the last year as well—for example, United Food and Commercial Workers improved their win rate to 72 percent (from 66 percent in 2023), the International Brotherhood of Teamsters reached 76 percent (from 71 percent), and the International Association of Machinists and Aerospace Workers jumped to 76 percent (from 56 percent).

The average time from petition to vote also shortened—from 53 days in 2023 to 38 days in 2024—further highlighting the importance of being proactive and not waiting for this short window of time to engage your employees.

Focus on proactive communication, tell your story, and stay ahead of the union trend.

### SOURCES

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<sup>1</sup> U.S. Census Bureau, [American Community Survey Reports](#)

<sup>2</sup> United Van Lines, [2024 National Movers Study](#)

<sup>3</sup> U.S. Bureau of Labor Statistics, [Total Separations Levels and Rates by Industry and Region, Seasonally Adjusted – 2024 M12 Results](#)

<sup>4</sup> Gallup, “[What Is Employee Engagement and How Do You Improve It?](#)”

<sup>5</sup> Gallup, “[The Benefits of Employee Engagement](#)”





# Unlocking the Hidden Power of Employee Surveys: How Segmentation Can Transform Retail Workforce Strategies

By Jennifer Beck, Consultant, Research and People Analytics, People Results

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## Introduction

Employee turnover in the retail industry is notoriously high, costing businesses millions in lost productivity, recruitment, and training each year. Coupled with several high-profile union elections in recent years, this has led human resources (HR) leaders to seek innovative ways to improve employee engagement, reduce attrition, and enhance overall workplace satisfaction. Employee surveys are a staple in modern HR practices, serving as essential tools for measuring engagement, satisfaction, and workplace sentiment. However, they often fall short in identifying issues that contribute to disengagement and workforce vulnerability.

These surveys generate vast amounts of data, but many retail organizations fail to extract their full value. Organizations will rely solely on overall engagement scores, missing critical nuances that could help predict and prevent workforce challenges before they escalate. By focusing on high-level trends and overall scores, they can miss crucial insights hidden within subgroups of their workforce.

Advanced segmentation techniques offer a powerful way to uncover these insights. Rather than treating employees as a monolithic group, segmentation



allows retail organizations to group employees, based on their unique attitudes and experiences, into workforce personas. This approach provides a clearer picture of workforce dynamics, making it easier to tailor initiatives to specific employee needs and proactively assess employee relations risks.

This article explores how retail organizations can reanalyze their existing survey data to gain deeper insight into employee engagement and vulnerability. By asking the right questions and using segmentation analysis to delve into workforce personas, HR leaders can identify best practices, pinpoint emerging issues, provide support to at-risk groups, and develop data-driven action plans. With these techniques, survey feedback tools can evolve from standard employee feedback mechanisms into strategic assets for transformation.

### Understanding Employee Vulnerability vs. Engagement

The first step in transforming how survey data is approached is to ensure that key issues beyond employee engagement are measured. Employee engagement and vulnerability are related, but distinct, concepts. Engagement reflects an employee's emotional commitment to the company, their motivation to work hard, and their pride in the organization's success. However, engagement does not always correlate with job satisfaction, security, turnover, or well-being.

For example, a retail employee may be highly engaged because they enjoy their role and team, yet still be vulnerable due to low wages, unpredictable scheduling, or a lack of growth opportunities.

People Result's *Workforce Risk Assessment*® is an insightful addition to any employee engagement survey, measuring an employee's day-to-day workplace experience. For example:

- Do employees feel heard and valued in decision-making?
- Do they believe management is approachable and transparent?
- Do they feel acknowledged and treated with dignity?

- Do they have job security, scheduling flexibility, and stability?
- Do they feel work is distributed fairly? Do they have an equal opportunity to grow? Are pay and benefits aligned with expectations and market/industry standards?
- Do employees have the tools and resources they need to be successful, and do they feel safe and cared for at work?



By integrating these topics into survey evaluations, organizations can gain a clearer picture of workforce risks. When these topics feed into segmentation analysis, HR teams can identify risk factors and at-risk groups before they escalate into areas of high turnover and widespread dissatisfaction.

### Identifying Workforce Personas Through Segmentation

One of the most valuable applications of segmentation is the ability to group employees into distinct workforce personas. Employees within retail have diverse motivations, expectations, and workplace experiences, making a one-size-fits-all approach ineffective. Through segmentation analysis, HR teams can respond in more meaningful ways based on shared attitudes and behaviors.

In People Result's *Workforce Persona Analysis*®, employees are grouped based on their workplace sentiments. For example, one group may be highly engaged and supportive of their direct supervisor, while another may feel overworked and at risk of burnout. These personas may even exist within the same department, revealing nuances that a simple mean score on work-life balance might have overlooked.

### Case Study: Segmentation in the Real World of Retail

A large regional retailer with over 100 stores and 50,000 employees sought to better understand their employee engagement data. After conducting a company-wide engagement survey with over 70 percent participation, the organization noticed high overall scores but also anecdotal reports of dissatisfaction in certain areas. Additionally, an increase in labor activity in the region prompted further investigation.

Through People Results' *Workforce Persona Analysis*®, five distinct personas emerged within their hourly retail workforce:

- Cheerleaders – Highly engaged and satisfied with all aspects of their job
- Casual Fans – Willing to go above and beyond but struggling with workload and work-life balance
- Fairweather Fans – Supportive of their supervisor but feel disempowered in their roles
- Naysayers – Feel unheard, lack work-life balance, and have concerns about their supervisors
- Tuned Out – Deeply dissatisfied with all aspects of their work experience

For the HR team, viewing their workforce through this perspective was transformative. Instead of applying generic engagement strategies, they developed targeted solutions to address specific concerns within each persona.

### Turning Insights Into Action

Aggregated survey results can obscure critical issues that only affect certain employee segments. By analyzing data through a segmented lens, HR teams can uncover hidden patterns and address concerns before they escalate. Without segmentation, these warning signs might go unnoticed, allowing issues such as workplace dissatisfaction, communication breakdowns, or burnout to fester.

In our retail example above, the HR team can now tailor their action plans in certain areas based on the percentage of a segment in an area. For example:

- Cheerleaders: These employees are the ideal candidates for leadership development programs. Locations with a large percentage of Cheerleaders can also be leveraged for identifying best practices.
- Casual Fans: There was a large percentage of Casual Fans among their hourly supervisor group. Knowing this allows HR to address workload expectations for this job level.
- Fairweather Fans: Areas where there are many Fairweather Fans indicate an opportunity for managers to engage in additional leadership training.
- Naysayers: The Naysayers may benefit from additional listening touchpoints and enhanced standards for following through on their suggestions.
- Tuned Out: Knowing where there is a large area of Tuned Out employees can help HR teams prioritize where they may need to collect more feedback or provide extra support.

## Identifying and Supporting At-Risk Groups

Employee turnover and disengagement can have costly consequences, especially in retail. By using the *Workforce Risk Assessment*® survey data in the *Workforce Persona Analysis*®, HR teams can identify the employees at risk of leaving, disengaging, or seeking third-party representation. Often, this analysis provides the HR team with five distinct workforce personas. Usually, two are quite positive and considered advocates of the organization. The other three are typically considered more disconnected and more susceptible to messaging from third-party organizers.

A leader can look at their store and determine how many of their employees are in the at-risk segments and may be considered vulnerable. They now have the tools to prioritize not only where they spend their time, but also how they will address the at-risk personas' key issues.

Taking this a step further, our team has been able to combine the *Workforce Persona Analysis*® with other risk indicators, such as geographic proximity to active union elections or petitions, to provide even more rigorous data to support HR teams in prioritizing their efforts.

## Conclusion

Employee surveys are a valuable resource, but their full potential often goes untapped. By reanalyzing existing survey data through segmentation, HR professionals in retail can gain deeper insights into workforce dynamics, uncover hidden trends, and develop targeted strategies for improvement.

Our *Workforce Risk Assessment*® and *Workforce Persona Analysis*® have proven to be powerful tools for analyzing workforce dynamics. Segmenting the right data allows retail organizations to identify distinct workforce personas, address emerging issues before they escalate, and recognize at-risk groups in need of intervention. More importantly, it empowers HR teams to take informed, proactive steps that drive engagement, retention, and overall organizational success.

As retail businesses continue to navigate workforce challenges such as high turnover, fluctuating demand, and evolving employee expectations, leveraging survey data effectively will be crucial. By adopting advanced segmentation techniques, retail organizations can transform employee feedback into a powerful tool for workforce optimization, ensuring that every decision is backed by meaningful, actionable insights.



# Understanding Retail Unionization: What HR Professionals Need to Know

By Mark Codd, Ph.D., Vice President and Managing Director, People Results

By 2025, most retail human resources (HR) professionals are well aware of the growing interest in unions among retail workers. Even companies once known for strong employee relations are seeing unionization efforts for the first time in their history.

Both HR professionals and retail employees are bombarded with news about unions. Like those from Gallup, surveys show record-high approval ratings for unions, and major retailers continue to experience organizing efforts. In this environment, HR leaders must stay informed about labor organizations active in the retail sector.

The good news? Plenty of public resources provide insight into union operations, many of which are free and easily accessible. Understanding these resources can help HR teams stay ahead, whether their workforce is unionized or facing an organizing campaign.

## The Importance of Transparency in Union Information

HR professionals recognize the need for transparency when communicating benefits and workplace policies. However, many HR teams struggle to provide balanced, factual information when employees consider union affiliation. Historically, only unionized retailers paid close attention to labor union activities. But with today's workforce showing renewed interest in collective action, that mindset needs to change.

Despite the growing conversation around unions, the numbers tell a different story. According to the Bureau of Labor Statistics, only 4 percent of the retail workforce belongs to a union—similar to private-sector unionization, which sits below 6 percent (Bureau of Labor Statistics, January 28, 2025, Union Members – 2024, <https://www.bls.gov/>



[news.release/pdf/union2.pdf](#)). This is a far cry from the 1950s, when nearly one in three workers was unionized.

Still, interest in unions remains strong. Many retail workers seek greater workplace choice while resisting restrictive union policies in states where membership is compulsory. Mark Mix, President of the National Right to Work organization, notes that today's workers want more transparency in how unions operate and spend member dues. His organization directs employees to government reports that reveal key union activities.

#### Essential Public Reports on Labor Unions

HR professionals and employees can access a wealth of union data through public filings, particularly from the Department of Labor's Office of Labor-Management Standards (OLMS). Some of the most valuable reports include the following.

**Labor Management (LM) Reports**, particularly the **LM-2**, detail union financial activities. Although several LM reports exist, the LM-2 report is submitted by larger labor unions and provides an annual overview of the union's organizational structure, dues, membership numbers, salaries for union employees, and information on significant expenses and revenues. Labor unions file these reports with OLMS annually in March. Failing to do so may expose the union leader to criminal penalties.

**IRS Form 990** provides financial disclosures for tax-exempt labor organizations. As an annual form, it details the major assets and liabilities of the labor union. The report must be filed with the IRS within 90 days after the end of the labor union's fiscal year. Charitable organizations are also required to file this form. While most of these forms are available online, each organization that submits IRS Form 990 must provide a copy upon request within a reasonable time.

**The Labor Union Constitution and Bylaws** outline the rules governing union operations. The labor union constitution is the first and most fundamental document describing the labor union's organizational structure. It includes the essential principles that govern the labor union's operations. The bylaws specify the rules allowing the labor union and its members to function effectively. Most importantly for employees, the bylaws contain the rules and requirements that hold union members accountable. Many labor union bylaws include provisions for putting employee members on trial for violating union rules. Labor unions disclose the following practices and procedures:

- Authorizing disbursement of funds
- Selecting officers and other union representatives
- Protesting a defect in the election of officers
- Disciplining and removing officers
- Fining, expelling, and suspending members
- Ratifying contract terms
- Authorizing strikes

Both the Constitution and Bylaws must be provided upon the formation of the labor union and are required to be filed within 90 days of the end of the fiscal year in which the bylaws were amended. Employees can search for the bylaws of any labor union, either international or local, through the OLMS [Online Public Disclosure Room](#).

Individually, these reports offer a snapshot of a union's activities—like an X-ray. However, when analyzed together, they provide a multi-dimensional view, much like an MRI. Since these reports are filed with federal agencies and subject to penalties for inaccuracies, they offer a credible source of information.



### Where to Access These Reports

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Most of these documents can be accessed through the OLMS [Online Public Disclosure Room](#). HR professionals should review them to stay informed and prepare to answer employees' questions about unions.

### Final Thoughts

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Union interest is on the rise, and retail HR professionals must be proactive in understanding labor organizations. By leveraging publicly available data, HR teams can provide transparency, educate employees, and ensure they're equipped to navigate today's evolving labor landscape.



# Using Change Management to Navigate Business Transformation and Mitigate Labor Challenges

By Kirsten Jordan; Lead Consultant; People, Organization, and Change; People Results

## Introduction

In today's fast-paced business world, change is inevitable. More than that, change is essential for a business to grow and innovate. But for change to truly drive value, it requires more than just a shift in strategy; it needs to be woven into the tapestry of an organization.

You may be asked to guide your teams through a transition, to ensure alignment between the strategic vision and your department's goals, to contribute to a transformation, or to develop a culture that is open and ready for change. Change management isn't just the tools and techniques to achieve these objectives—it's the process to get from where you are (current state) to where you want to be (future state).

Let's say your company wants to take advantage of one of the many new retail and supply chain trends in play (e.g., e-commerce, automation, artificial intelligence (AI), sustainability). If you are thinking

about embarking on a business transformation to implement one of these trends, it is important for you to be able to flex your business and your workforce to quickly adapt to change.

## What exactly is change management?

An easy way to understand change management is *managing the people side of change*. Change management identifies the behavior changes needed to transform systems and processes effectively. It ensures that your people are ready to adopt the planned change, and it ensures both short-term success and long-term value.

When making a major change, you want to be able to keep the momentum going in your business at the same time. Imagine you are driving down the road, and you want to make a change without stopping the car—complicated, but not impossible.

By employing change management, you help to ensure that teams experience minimal disruption as they transition to a new policy, process, or technology. You also help to minimize risk. Changes that are not well managed can lead to disruptions that adversely affect productivity and profitability.

#### How does change management mitigate potential labor challenges?

Anyone who has worked with a group investigating union membership knows that certain triggering events prompted this decision—perhaps a change in company policy, a shift in benefits or compensation, or the implementation of a new system. How were these initiatives handled? Were expectations set properly? Did the organization consider how the new system might spike fears of automation or job insecurity? Could the organization have foreseen that the new policy might be viewed negatively by a segment of the population?

Effective change management helps an organization consider and plan for all of the possible outcomes of a major change in advance. It also considers how an organization can be fully transparent about a change, educating employees about the reasons it is necessary, involving them in the decision-making process, and collecting employee feedback along the way.

Transparency in an organization builds trust with employees, and a critical result of well-executed change management is increased trust and improved employee engagement. **Highly engaged employees rarely look to outside labor organizations for help and alternatives.**

#### What kinds of changes might your company be considering?

Change management is beneficial for changes big and small—both those impacting the entire organization and those impacting only a single store or segment of an employee population. Following are several types of change common to retail.

- **New customer expectations:** Logistics adaptations needed to fulfill changing customer expectations (e.g., fast delivery, inventory management)
- **Automation and technology integration:** The implementation of new technologies/AI in warehouses or in use for forecasting; switching to a different logistics approach; training staff to operate across different channels (in-store, online, and distribution centers)
- **Sustainability and ethical practices:** A shift to sustainable sourcing and eco-friendly practices
- **Labor shortages and workforce dynamics:** A shrinking workforce or the need for more flexible and adaptive labor models in retail and supply chains
- **Building resilient and adaptive labor forces:** Determining how to more effectively attract and retain your workforce by developing labor models that are agile and can adapt to supply chain disruptions and new trends

#### How does change management help get things “done”?

In broad strokes, if you were implementing a large change, such as those just listed, **change management aims to do the following.**

- **Set expectations for the change** by helping people understand the practical details of what’s changing—who, what, when, why, and how. An important question to ask yourself is “What does done look like”? If you aren’t crystal clear about the desired end state, how can the rest of the company follow?

- **Determine relevant changes for stakeholders** through a detailed stakeholder analysis, understanding specific impacts about the change to key stakeholders.
  - **Provide a methodology to guide change**, including a detailed timeline, communication needs, and training and education requirements throughout the change effort.
  - **Help adoption and sustainability of changes** so that people understand how to do their jobs effectively when the change goes into effect and can institutionalize the change long after the go-live.
  - **Accelerate business and ROI results** by providing positive reinforcement for the change and enabling smooth transitions to the desired future state.
4. **Create a change strategy and an approach for managing the change:** Create the plan for making and implementing the changes with your teams. This should cover leadership and stakeholder engagement, communication, learning, business readiness activities and measurement, and monitoring resistance.
  5. **Develop communication and learning plans:** Develop plans that address how, when, and on what topics you will be communicating with your teams and all the impacted stakeholders. Do the same for your learning and education plans. Determine which skills and abilities need to be enhanced.
  6. **Develop a network of people who can help facilitate and monitor the change:** You must create a change network of leaders and key subject matter experts to help implement your changes. These are the people who are going to explain the changes and tell your teams the benefits of the change and the “WIIFM” or “What’s In It For Me?” They will answer questions and help get everyone comfortable and ready to make the changes.

#### What are the elements of a structured change process?

A structured change process includes the following steps.

1. **Understand what’s changing:** Have you gotten really clear on your goals and objectives for the change? If you haven’t, how can you expect everyone to be successful making the change?
2. **Determine all impacts to people, processes, and technology:** It is critical to understand and document the details of the policy, process, and technology changes so that you understand exactly what is changing. This is how you can then identify the behavior changes needed by the impacted groups to enable those changes.
3. **Solidify leadership, sponsorship, and governance:** If you don’t have your leaders behind the changes, you aren’t going anywhere. You will need to identify the people who will advocate for the changes and continue to reinforce why you are making the changes, especially when the going gets rough. And the going always gets rough with a major transformation—it’s *when*, not *if*!
7. **Engage stakeholders through the change:** Determining the most efficient way to engage the people impacted by your change is a key part of being ready for it. No one likes being just told to make a change. (It’s a great way to build resistance to your change though.) Instead, figure out what’s in it for them and what it is going to take to get them ready. Does this take a little longer? Yes. But it also helps you know exactly what needs to happen to make sure your organization is ready.
8. **Monitor business readiness:** Determine the actions that need to be put in place before you are ready to make your change. Measure and verify the actions. How will leaders and advocates for your program know what to do?

9. **Anticipate sustainment needs:** Getting to the finish line of the go-live is only the beginning of the journey. What is your plan to keep people on track after all the visibility of the transition or go-live date is gone? How will you know if there are ongoing questions or if people start to back-slide to old behaviors that are no longer in the best interests of the company? What is the plan for ongoing improvements? Are your teams aware of how they can continue to stay involved?

#### Where is the proof this works?

There are inherent challenges when trying to measure the value of change management, which deals with the human side of change and its impact on adoption and project success. Quantifying the value of change management is not straightforward and may depend on various factors, such as the complexity of the change, the personality of the stakeholders, and the skills of the change managers.

Focusing too much on the numbers may cause one to lose sight of the ultimate goal of change management, which is to enable a smooth and successful transition for your people.

However, let's look at what Prosci and Bain & Company have said about how change management can drive results.

- Organizations that implement excellent change management are 7x more likely to meet project objectives than those with poor change management. Even if an organization implements only “fair” change management, it is still 3x more likely to meet project objectives than an organization with poor change management.<sup>1</sup>
- Organizations that excel at change management achieve revenue growth at rates of 1.5x to 3x higher.<sup>2</sup>

#### Conclusion

A well-crafted, structured, change management process can have a critical role in producing successful transformations. Make sure your people are not just along for the ride, but are powering the engine for change.

Change management will help your business capitalize on improvements in policy, process, and technology. It will help you to create a flexible, skilled workforce with a culture that can handle change, thus mitigating labor issues.

Will using a structured change management approach take time? Yes. But a better outcome is guaranteed. As the adage says, **“If you don’t have time to do it right, when will you have time to do it over?”** Transformational change is rarely something you have the chance to do over.

<sup>1</sup> Prosci, “[The Correlation Between Change Management and Project Success](#)”

<sup>2</sup> Bain & Company, “[Companies That Handle Change Well Rack Up Better Financial Performance](#)”



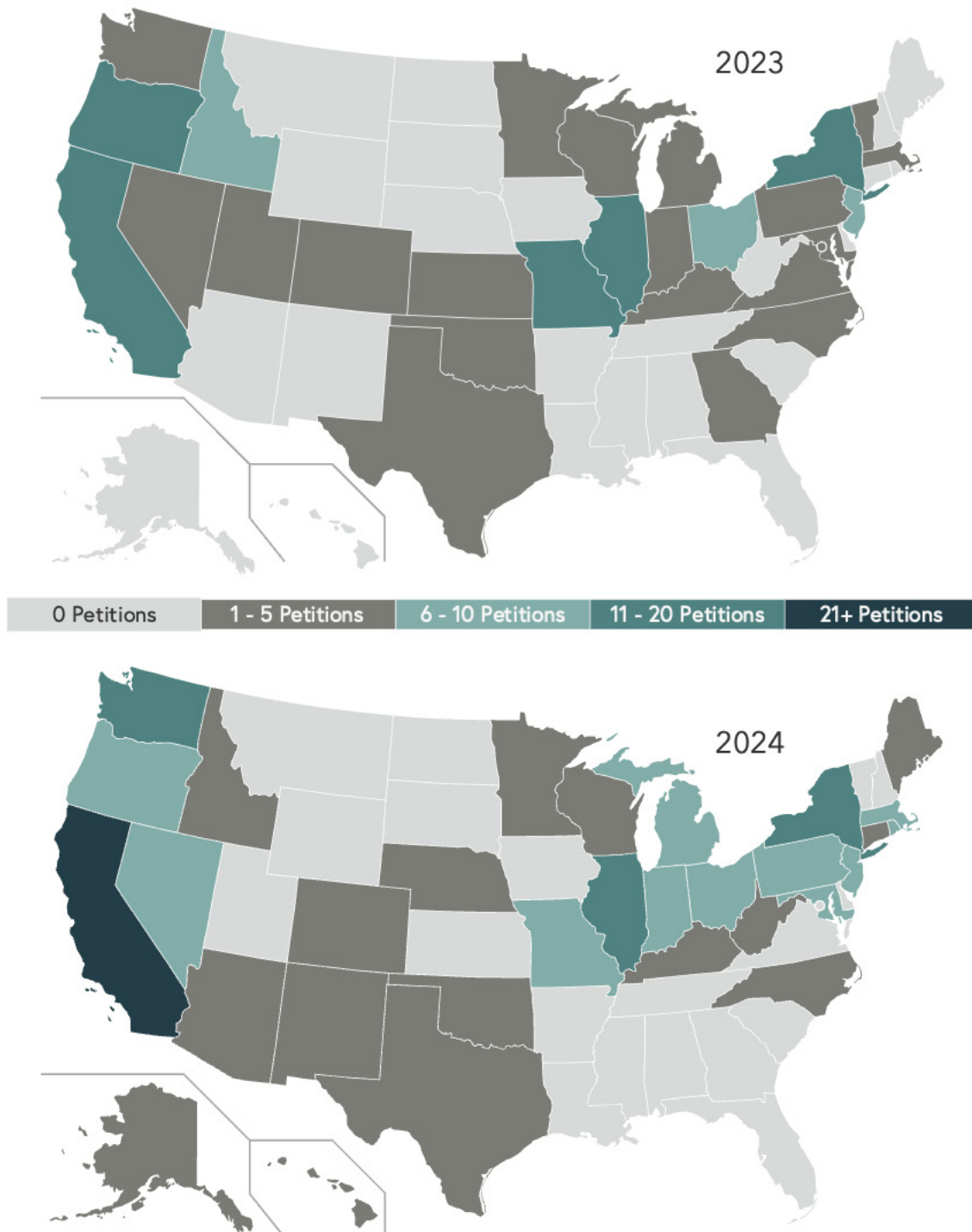
# Appendix A: Summary of Petitions Filed and Elections Held

All Industries – Summary of Petitions Filed and Elections Held (2015–2024)										
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total Petitions	2,580	2,281	2,274	1,902	2,033	1,552	1,683	2,500	2,675	3,109
Total Representation Petitions	2,212	1,970	1,937	1,573	1,774	1,352	1,412	2,185	2,361	2,793
Total RC Petitions	2,154	1,914	1,876	1,542	1,732	1,306	1,383	2,159	2,158	2,364
Total RM Petitions	58	56	61	31	42	46	29	26	203	429
Union Not Elected	469	371	395	341	307	258	251	394	371	445
Union Elected	1,107	975	992	830	925	605	740	1,222	1,344	1,577
Total Decertification (RD) Petitions	368	311	337	329	259	200	271	312	314	316
Union Not Elected	107	104	123	110	103	55	84	103	110	115
Union Elected	68	64	60	61	56	49	59	56	59	50

Retail – Summary of Petitions Filed and Elections Held (2015–2024)										
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total Petitions	158	139	124	107	115	92	160	242	166	212
Total Representation Petitions	123	110	96	85	98	80	142	225	143	187
Total RC Petitions	114	105	89	81	92	76	135	223	129	157
Total RM Petitions	9	5	7	4	6	4	7	2	14	30
Union Not Elected	35	37	20	34	27	13	28	43	44	37
Union Elected	50	37	39	30	32	28	58	120	81	94
Total Decertification (RD) Petitions	35	29	28	22	17	12	18	17	23	25
Union Not Elected	8	5	9	7	7	4	5	7	5	8
Union Elected	3	3	1	5	3	2	4	4	5	5

All Non-Retail Industries – Summary of Petitions Filed and Elections Held (2015–2024)										
	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024
Total Petitions	2,422	2,142	2,150	1,795	1,918	1,460	1,523	2,258	2,509	2,897
Total Representation Petitions	2,089	1,860	1,841	1,488	1,676	1,272	1,270	1,960	2,218	2,606
Total RC Petitions	2,040	1,809	1,787	1,461	1,640	1,230	1,248	1,936	2,029	2,207
Total RM Petitions	49	51	54	27	36	42	22	24	189	399
Union Not Elected	434	334	375	307	280	245	223	351	327	408
Union Elected	1,057	938	953	800	893	577	682	1,102	1,263	1,483
Total Decertification (RD) Petitions	2,089	1,860	1,841	1,488	1,676	1,272	1,270	1,960	2,218	2,606
Union Not Elected	99	99	114	103	96	51	79	96	105	107
Union Elected	65	61	59	56	53	47	55	52	54	45

## Appendix B: Maps of Representation Petitions Filed in Retail



# Appendix C: NLRB Definitions

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## WHAT IS THE NATIONAL LABOR RELATIONS BOARD?

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The National Labor Relations Board (NLRB) is an independent federal agency established to enforce the National Labor Relations Act (NLRA). As an independent agency, the NLRB is not part of any other government agency, such as the Department of Labor.

Congress has empowered the NLRB to conduct secret ballot elections so employees may exercise a free choice whether a union should represent them for bargaining purposes. A secret ballot election will be conducted only when a petition requesting an election is filed. Such a petition should be filed with the Regional Office in the area where the unit of employees is located. All Regional Offices have petition forms that are available upon request and without cost.

## TYPES OF PETITIONS

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### 1. Certification of Representative (RC)

This petition, which is normally filed by a union, seeks an election to determine whether employees wish to be represented by a union. It must be supported by the signatures of 30 percent or more of the employees in the bargaining unit being sought. These signatures may be on paper. This designation or “showing of interest” contains a statement that the employees want to be represented for collective-bargaining purposes by a specific labor organization. The showing of interest must be signed by each employee, and each employee’s signature must be dated.

### 2. Decertification (RD)

This petition, which can be filed by an individual, seeks an election to determine whether the authority of a union to act as a bargaining representative of employees should continue. It must be supported by the signatures of 30 percent or more of the employees in the bargaining unit represented by the union. These signatures may be on separate cards or a single piece of paper. This showing of interest contains a statement that the employees do not wish to be represented for collective-bargaining purposes by the existing labor organization. The showing of interest must be signed by each employee, and each employee’s signature must be dated.

### 3. Withdrawal of Union-Security Authority (UD)

A “UD petition,” which can also be filed by an individual, seeks an election to determine whether to continue the union’s contractual authority to require that employees make certain lawful payments to the union to retain their jobs. It must be supported by the signatures of 30 percent or more of the employees in the bargaining unit covered by the union-security agreement. These signatures may be on separate cards or a single piece of paper. This showing of interest states that the employees no longer want their collective-bargaining agreement to contain a union-security provision. The showing of interest must be signed by each employee, and each employee’s signature must be dated.

### 4. Employer Petition (RM)

This petition is filed by an employer for an election when one or more unions claim to represent the employer’s employees or when the employer has reasonable grounds for believing the union that is the current collective-bargaining representative no longer represents a majority of employees. In the latter case, the petition must be supported by the evidence or “objective considerations” relied on by the employer for believing that the union no longer represents a majority of its employees.

### 5. Unit Clarification (UC)

This petition seeks to clarify the scope of an existing bargaining unit by, for example, determining whether a new classification is properly a part of that unit. The petition may be filed by either the employer or the union.

### 6. Amendment of Certification (AC)

This petition seeks the amendment of an outstanding certification of a union to reflect changed circumstances, such as changes in the name or affiliation of the union. This petition may be filed by a union or an employer.