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Overview

Today, more than ever, talent management is an important component of an organization’s success. To help HR professionals and other business leaders succeed in evolving their approach to talent management, we have developed The Talent Management Cookbook. We have designed this report to read like a typical cookbook and have provided “recipes” for the core “entrées” necessary for an updated talent management approach. Of course, an organization could choose a different “menu,” but we think that our selected recipes will help leaders build the foundational blocks for a successful talent management approach.

In This Menu

• **Entrée 1: Social Sourcing.** Readers will learn about the latest tools being used to identify active and passive candidates, screen them for capability and compatibility, and leverage the power of collaboration between recruiters and talent managers.

• **Entrée 2: Continuous Learning.** This recipe explores how to advance from a blended learning model to one that emphasizes on-the-job experiences, tools such as online libraries and job aids, and how to leverage the classroom and e-learning.

• **Entrée 3: Operational and Compliance Training.** Readers will see why operational training is important, and also how to implement an effective compliance learning program. As this training is one of the few times learning organizations have a captive audience, it is essential to use this opportunity to both impart critical knowledge and reinforce a strong learning culture.

• **Entrée 4: Modern Performance Management.** The traditional way of managing employee performance has given way to a new model. Readers will see how using a process of regular goal-setting, continuous feedback, coaching, and rewards and recognition can optimize the workforce for long-term success.
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Introduction

Today’s workplace—and workforce—are in the midst of a rapid and continuous change. The past decade has seen transformations such as:

- **How businesses operate.** Communication and collaboration tools have enabled teams to work together across multiple time zones and varied cultures. These types of tools facilitate collaboration and faster decision-making, and therefore quicker reaction to the marketplace.

- **How consumers buy.** Today's consumer is more educated and has more options. Technology and social media have put more information than ever at consumers' fingertips. As a result, the way products and services are marketed and sold has changed dramatically.

- **How businesses compete.** Barriers to entry have changed. Online sales often do not require a brick-and-mortar location or any inventory to be held. Consumers have come to accept this as the new normal.

- **What employees expect.** Gone are the days of company loyalty. Young adults joining the workforce straight out of college are not looking for pensions but rather developmental opportunities and the chance to make a difference.

In this transformative period, business leaders report that filling talent and skills gaps are among their biggest challenges.¹ Meanwhile, global growth, including merger and acquisition activity, has meant that businesses need to rapidly integrate and improve the skills of employees in these organizations.²

The clear conclusion drawn from these trends is that we need a better approach for managing talent. Today, talent management is about using systems, solutions, and processes to make the elements of talent management work together and reinforce each other.

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² Ibid.
We developed this cookbook to help leaders examine their own talent management organizations and processes, as well as to develop strategies and solutions that can lead to success. Included are four recipes that will guide readers through the steps that will help create a dynamic workforce, within a dynamic workplace, that can achieve success.

The four recipes in this cookbook are as follows:

1. **Entrée #1:** Social Sourcing
2. **Entrée #2:** Continuous Learning
3. **Entrée #3:** Operational and Compliance Training
4. **Entrée #4:** Modern Performance Management
The competition for finding high-quality job candidates is growing increasingly intense as the global economy steadily grows out of the most recent recession. According to the U.S. Bureau of Labor Statistics, unemployment in the United States dropped to 7 percent at the end of 2013—the lowest level in five years. In highly skilled fields, the job market is much tighter. For example, unemployment in the technology sector is estimated to be just 3.6 percent. Further, according to an analysis by Computerworld, the unemployment rate for software developers is a mere 2.2 percent—essentially nonexistent.

This comes at a time when the practice of sourcing, recruiting, and selecting qualified candidates is being completely revolutionized. Printed classified ads—those relics from another era—have given way to web-based employment marketplaces, industry-specific marketplaces, and robust company job boards. Those online tools are now being augmented and, in some cases, supplanted by novel social recruiting tools that use Twitter, Facebook, LinkedIn, and other resources. Recruiters are also finding candidates on function-specific online gathering spots such as GitHub and Stack Overflow (e.g., for the software developer community).

Although unemployment remains high among many groups, highly skilled workers are in great demand, making it critical for organizations to become “talent magnets” and create a steady pipeline of top

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people. This attraction should reach both outward and inward. Externally, organizations should focus on building and communicating a strong and relevant employment brand, as well as treating every employee as a brand ambassador.

The New Talent Sourcing Landscape

Today, recruiters should cast a wide net, employing every available resource to identify external, internal, and especially passive candidates. This latter group—those who are not actively looking for jobs—may be the most valuable because these candidates are likely having success at their current positions.

As many leaders know, these valuable candidates are often on social media. Although scanning candidates’ LinkedIn or Facebook profiles can prove enlightening, new tools are enabling organizations to move beyond these ubiquitous views. For example, some tools can aggregate information from various networks and online gathering spots to enable talent acquisition teams to obtain a more multifaceted view of candidates. Tools that survey industry-specific chat rooms and message boards can reveal how skilled a candidate is at solving certain problems. Some vendors can scan a wide range of social media looking for candidates, including not only the largest networks but also niche sites such as Meetup, Quora, and even social video sites such as Vimeo.

Although much effort is being put into identifying excellent external candidates, talent acquisition leaders would be remiss if they failed to create a robust online-based sourcing strategy for current employees. The use of internal social platforms to build employment brand and post jobs is

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8 Source: An analysis by Staff.com suggested that 29 percent of job-seekers use social media as their primary search tool—a figure that in certain sectors is undoubtedly low (“Social Media for Recruitment – Infographic,” Staff.com, n.d., www.staff.com/blog/social-media-for-recruitment-infographic).
a solid first step being taken by many organizations; however, most talent acquisition teams could do more. For example, many organizations are aggregating the vast array of information (e.g., demographic, performance, and assessment data) on current employees, and then enabling employees to supplement it with career aspirations, skills, knowledge, and abilities—information that may not be as well known to the organization.

This approach provides talent acquisition organizations with a searchable database of known internal candidates. Yet, despite the potential power represented by creating such a database, few organizations are taking advantage of this opportunity. Instead of identifying qualified internal candidates, many organizations are dogmatically aligned to the mantra of “employees must drive their own careers.” The result is that talent acquisition organizations are taking a “post and pray” approach with internal candidates. The irony is many of those employees do drive their own careers—right out of that organization. The reason? These employees are unable to find the right internal opportunity on their own, and they are receiving little to no help from their organizations.

Instead of allowing this situation to continue, organizations should leverage the wealth of information available to them—both inside and outside the organization—to create a pool of qualified internal candidates. For example, if an organization is looking to find a new manager for a group of software developers, then it could use its talent management data to find individuals who fit the basic requirements (e.g., tenure, location, position, performance rating). The organization could then leverage both internal and external online social tools to determine whether the person has taken on leadership roles in the past within the organization’s online forums (e.g., by being a leader within an employee resource group) or through extracurricular activities (e.g., as shown on LinkedIn or Facebook). The talent acquisition lead could then provide the hiring manager with a list of relevant internal candidates that the manager could “casually” get to know better. This can be done before it is ever suggested to the employee that he or she apply for the new role.

Although many individual recruiters have adopted social media tools, most organizations are still in the early stages of developing and implementing comprehensive social sourcing strategies. This adoption gap is creating an incredible opportunity for talent acquisition teams. Those that move quickly will likely gain an enormous advantage over the competition when it comes to finding appropriate employees for their organizations.
Recipe

Creating a Talent Acquisition Function with Exceptional Social Sourcing Capabilities

Ingredients

- Sourcing specialist / talent community manager who is equal parts subject-matter expert / organization cheerleader / talent sleuth
- Recruiter who is equal parts organization cheerleader / close-at-all-costs salesperson / empathetic hand-holder
- Strong partnerships with hiring managers to identify critical skills and capabilities, as well as target-rich environments for candidates
- Flexibility and enthusiasm to try interesting and promising new solutions (in small batches) for talent community build-out and sourcing

1. **Determine the critical skills and capabilities needed across the organization.** This process should be initiated by surveying hiring managers, workforce planning experts, and business leaders. Not only will this help focus the talent acquisition organization on a clear set of goals going forward but also it will help ensure alignment with key stakeholders in the business.

2. **Identify target-rich environments for candidates.** Practically speaking, this means identifying not only where candidates with the desired skills live and work in the physical world but also where they spend time online. To do this, leverage your relationships with hiring managers to better understand your potential candidates. Also consider using tools to determine where people spend time online and whether they are actively searching for a new job or may be open to new opportunities.
Recipe (cont’d)

3. **Attract candidates by inviting them to join small, online communities.** Develop a strategy for attracting active and passive candidates to a specific online location (e.g., a LinkedIn page, a dedicated website), and then develop a talent community within that location. Steadily warm up the community by populating the site with interesting materials that help candidates see inside the organization, and subsequently return and participate. This can include videos from employees on what it is like to work at the organization, blog updates from talent acquisition staff, reports on exciting projects within the organization, crowdsourced solutions to challenges the organization is addressing, and even employment branding commercials. The idea is to pull people to the organization—to effectively use these communities as talent magnets. Involve hiring managers in developing ideas that can attract candidates with specific skills. As the talent community builds, slowly and carefully identify qualified candidates and steer them to a specific recruiting team member.

4. **Explore suitability of alternate social sourcing solutions that can provide you with detailed insights into candidates’ skills.** Some solutions, for example, enable the use of Twitter and Facebook as a way to identify and interact with passive and active candidates. Other solutions can search online meeting places and forums where candidates share ideas or post examples of their work.

5. **Continuously manage your organization’s brand.** Scan and regularly update third-party websites that employees and candidates use to gain greater insight into your organization. Examples of these online destinations include Glassdoor and Indeed. Additionally, it’s important to monitor, survey, and then improve candidate experiences. Questions to ask include:
   - What did they like about the process?
   - What did they not like?
   - Were they contacted in a timely manner?

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9 A “talent community” means different things in different organizations, but we define it as an online and interactive community of candidates interested in a specific organization. In these communities, potential candidates can interact with other candidates and existing employees at an organization.
Recipe (cont’d)

You may want to also apply for “Best Place to Work” recognition. Although these applications can be time-consuming, they can also be important to an employment organization’s brand. The fact that they are independently awarded bestows credibility above and beyond an organization’s own content.

6. **Consider implementing prehire assessments to screen and enable stack ranking as early as possible.** Solutions that offer online collaboration with hiring managers can help recruiters quickly develop tests for knowledge, skills, and abilities. These assessments can go beyond those metrics, however, and include personality assessments to help facilitate a match between organizational culture and work environment.

7. **Carefully align your candidates with the job requirements you have discussed with your hiring manager.** This will help make sure that you are focused on the candidates with essential “must have” skills first.

If the steps you have followed to this point have been well aligned, coordinated, and administrated with your hiring manager partners, your organization will have an online presence that will help enable you to identify the leading candidates inside and outside your organization.
Bersin Blue Plate Special: Using Social Sourcing to Gain a Holistic View of Candidates

An international software development company with a large roster of *Fortune* 500 clients recently found itself in a challenging position. The organization’s success in what was once a niche technology field had blossomed, but with that growth came competition from other large industry players. Not only was the software company suddenly competing against larger organizations but also it faced dramatically increased competition in the job market for a particular type of engineer.

An early adopter of technology and social sourcing as a recruiting tool, the talent acquisition team at this company was searching for an advantage over the competition. The organization began to question whether it was missing qualified candidates by only seeking out the most active voices on social media. Furthermore, it was looking to become more efficient. Historically, the company would spend up to 21 days identifying and assessing candidates before it began the formal interview process. Although recruiters would often come up with a list of 40 to 50 potential candidates for open jobs, in most cases only four to five candidates were actually qualified for any particular position. If they could narrow down the search early in the process, then the talent acquisition team believed that it would see increased efficiency and better candidates to share with hiring managers.

To address these issues, the talent acquisition team enlisted the help of the organization’s CTO (chief technology officer) to assess different vendor solutions. The organization launched a one-year pilot program with a solution provider whose platform offered the team several advantages over its existing model.

The solution provider’s platform was capable of searching more than 60 social media sites, some of which included the world’s most popular forums and others that were specific to software and developers. By aggregating this information, recruiters were given a more holistic view of candidates and could thus make more objective assessments. The tool also ranked candidates based
on their skills. This predictive analysis allowed recruiters to narrow their search to a smaller group of candidates.

Further, recruiters found that the broader view of candidates made their conversations more relevant to candidates and enabled the recruiters to engage on multiple levels. Another feature of this broader picture meant recruiters had multiple channels for contacting clients.

As of this writing, the software organization has just begun analyzing the results from its one-year pilot project, but its own anecdotal evidence has been so strong that it has since rolled out the solution across the global organization. One early test of the solution proved particularly telling. The software company asked the vendor to use its candidate analysis feature to rate a blinded list of 100 candidates and recently hired employees. When the rankings came back, they showed that the employees with the top rankings were either already enjoying successful careers at the organization or were high on the recruiter's lists. For the talent acquisition team, these findings confirmed that the team could use the new solution to more quickly identify the top talent, bring them in for interviews, and then hire them into the organization.
Entrée #2: Continuous Learning

As we mentioned in the Introduction to this report, both the workforce and the workplace have changed. The result is that employees need new skills, knowledge, and abilities to adapt to this new, ever-evolving business environment and help their organizations compete effectively. To enable this adaptability, organizations are moving to a model of continuous learning, relying less and less on the traditional classroom and blended learning approach.

What do we mean by “continuous learning”? As the name suggests, continuous learning means that the organization does not look at learning and development (L&D) only in terms of formal, planned, learning activities. Rather, the company organizes its resources, expectations, and learning culture in such a way as to encourage employees to learn continuously throughout their tenures.

Figure 1 shows the Bersin by Deloitte Continuous Learning Model, which illustrates the key concepts of continuous learning. This model is different from other learning models in two important ways:

1. It accounts for immediate, intermediate, and transitional learning needs of employees.

2. It facilitates a holistic approach to development across learning paradigms.
Learning Needs

Our Continuous Learning Model reflects the fact that employees learn constantly in a variety of ways. We have classified those learning needs into three main categories:

- **Immediate.** Regardless of their position or even tenure in the company, at one point or another, all employees will need access to information that helps them perform their current job functions.

- **Intermediate.** The second circle in our Continuous Learning Model represents the types of learning elements employees need to develop in their current positions—and to continue to expand competencies.

- **Transitional.** The outer circle of the model represents learning elements necessary to develop employees to meet long-term business goals or systemic career jumps. This can be a new role, a shift in a career, or other related move.

![Figure 1: Bersin by Deloitte Continuous Learning Model](source: Bersin by Deloitte, 2014.)
It is important to clarify that the rings in this model do not indicate skill level. Although employees at a higher management level may find that more of their development activities are located on the outer transitional ring, these categories are descriptive, not prescriptive. Typically, employees will find themselves moving between the three rings regularly. This model allows employees, L&D, talent management, and line management to take stock of available development activities, and then tailor the path based on employee interests and business needs.

**Learning Paradigms**

Although many L&D organizations focus on formal education, research tells us that 70 percent of learning occurs outside formal programs. Our Continuous Learning Model accounts for learning in four contexts (not just one):

- **Education.** Learning elements that fall into this context are those that most of us think of when we refer to learning and development. These learning elements have a beginning and an end, are often seen as events, and are trackable (e.g., classroom training, e-learning, simulations).

- **Experience.** Learning in this context occurs while the employee is in the workplace. Learning elements in this category can include stretch assignments, job rotations, and special projects.

- **Environment.** This learning context encompasses tools and systems that employees use on the job to learn or support them in their work. These systems include information systems, search engines, job aids, performance support tools, and online asset libraries.

- **Exposure.** Exposure includes learning elements that involve interactions and relationships. This context helps employees develop by building connections through professional conferences and organizations, volunteer assignments in the community, communities of practice, and coaching and mentoring activities.

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One final point: If we think of the continuous learning circle as the entirety of the learning activities that an employee will be exposed to over his or her tenure in a particular role, then the percentage of learning accomplished through education, experience, environment, and exposure will vary by employee. For example, an accountant who needs to remain informed and compliant with financial and legal regulations may be assigned more education than exposure elements. Likewise, a new employee may need to focus learning in experience and environment, whereas a seasoned manager may find more to learn through exposure.

The Continuous Learning Landscape

Is a continuous learning model all that important to success? We think so. This type of model has several advantages over the traditional training model:

- **Knowledge retention and development.** Perhaps the most obvious reasons for adopting a continuous learning model are greater retention of knowledge by employees and continuous employee development through a steady stream of learning elements that reinforce new ideas. In a traditional event-driven learning environment, employees’ knowledge retention is initially high but declines precipitously over time. Continuous learning enables employees to return to the knowledge they recently acquired and reinforce it over time.

- **Agility and adaptability.** A continuous learning model helps businesses remain agile and responsive for several reasons. First, it aids in creating a culture of learning that encourages employees to seek information at the moment of need. Instead of insisting on a rigid learning format dictated from higher up, a learning culture showcases an organization’s desire to fully develop employees.

A continuous learning model is also often more adaptable. Employees increasingly require information that is new, timely, and delivered in small, bite-size pieces. With a continuous learning model, informality and simplicity can be built into learning assets—often at a lower price. Further, with these types of assets, employee development plans can leverage a variety of learning assets to make the learning experience more tailored.
• **Learner responsibility.** Finally, a continuous learning model puts some of the responsibility for development on the employees themselves. This is not to say that the L&D function does not play a crucial role; however, continuous learning changes the nature of the game. With a continuous learning model, employees do not wait around to be spoon-fed information in the same way that they do with an event-based or programmatic approach. Instead, they are expected to take an active role in their own development and use the available resources to solve problems. In essence, learners adopt the mantra of librarians: “I don’t know the answer, but I know how to find out.”

**Implementing Continuous Learning**

Success in implementing continuous learning is contingent on organizations developing a learning architecture. A learning architecture is a documented set of elements that define what the L&D organization will accomplish and the impact it will leave on the organization—not a task checklist. This architecture enables L&D leaders to project their organization as a solution provider and business asset.

Although each organization’s learning architecture will be different, reflecting its own strategies and business demands, there are some essential and common components of a successful learning architecture. These include the following:

• **Solutions.** High-impact learning organizations take a “solution” approach—instead of a programmatic approach—to learning, synthesizing all relevant learning elements to offer complete solutions that meet business needs.

• **Approaches.** Approaches are the learning and development elements accounted for within the organization. They can be defined as the building blocks used to create solutions.

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11 A “learning architecture” is an organization’s unique map of agreed-on learning needs, learning strategies, and delivery strategies for its training. This gives designers, trainers, and managers a clear view of what types of problems the organization will solve, how they will solve them, what tools they need, and which approaches the organization will take. It deliberately limits the organization’s options by deciding how and where the training organization will focus its efforts, and it builds on the organization’s culture and history of learning.
• **Core processes.** These are the processes that are essential to the functioning of L&D. Common examples include performance consulting, design and development, content development, communication and internal marketing, and support.

• **Disciplines.** The skills that an L&D organization needs to function are its disciplines. Generally, these include elements such as instructional design project management and content development.

• **Tools and technology.** These are the tools and utilities required to both create and consume training within an organization.

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### Recipe

**Building a Learning Architecture to Support Continuous Learning**

**Ingredients**

- Several strong-willed leaders willing to stake out a clear position on the types of challenges L&D will solve in an organization
- Several (as many as possible) innovative and creative L&D managers interested in applying different learning approaches
- Skilled communication techniques to explain your L&D organization’s essential role in business success
- Time and budget to invest in continuous learning approaches (amount will vary by scope of learning initiative and organization size)

1. **Define the scope of your learning and development organization.**
   When cooking any meal, you first need to understand your overall goal. In this case, that means identifying the types of solutions the learning organization will provide. Start by clarifying within L&D, and then to the rest of the organization, what development looks like in this company. To do this, organizational leaders should answer the question: “What does it mean to develop employees in our organization?”
Recipe (cont’d)

You can begin building this answer by assessing what your organization does currently. Work with senior leaders to consider questions such as the following:

- What outcomes are we trying to reach as a result of our current development efforts? To what extent are we achieving those outcomes today?
- What are the outcomes we want to achieve? What would great development look like in the future?
- What is currently working and what is not?
- What do we need to stop doing?
- What do we need to start doing?

Keep in mind that what may be an appropriate definition in one organization may be completely wrong for another. Yet, it is crucial to get this definition right because it affects everything that L&D does. If development means encouraging participation in professional organizations, then this will become a part of the learning architecture and therefore a part of development plans. Likewise, if development means participating in cross-functional job rotations, then this, too, should be integrated into the definition. The point is to know what development looks like in your organization.

2. **Clarify the needs of the business and the audiences that L&D serves.**

If your L&D organization lacks a clear understanding of the most pressing business challenges and L&D’s role in helping address them, now is the time to obtain that understanding. Engage in conversations with business leaders about their most critical current business needs and what they anticipate them to be in the future.

To determine your audience, itemize the knowledge, skills, and abilities the organization needs to develop today and in the near and long-term future. Analyze how and where your audience works and learns. For example, does your audience travel extensively to global locations? Or do they primarily work from a single location?
Recipe (cont’d)

3. **Build your organization’s learning structure around the four core learning elements that reflect today’s business environment (education, experience, environment, and exposure).** Collaborate with business leaders to develop an understanding of the breadth of resources that will be most appropriate for each audience. Remember to include the critical elements of a learning architecture in your design (solutions, approaches, core processes, disciplines, and tools and technology).

4. **Align your learning architecture with your learning culture.** For example, if your organization is moving from a strictly formal learning framework to one that relies on learning beyond the classroom—including experience, environment, and exposure—then make sure your organization’s culture is willing to embrace this change. If your organization’s existing culture does not reflect this approach, then consider how to change the culture. For some organizations, that change should be evolutionary and gradual in nature; for other organizations, it may need to be revolutionary. Understand which approach is appropriate for your organization. If your organization’s culture already aligns with your learning architecture, then it is important to leverage that culture.

5. **Communicate the learning architecture.** Success here requires two elements. The first is to create an easy-to-understand visual that should be widely shared within your organization. Some companies call this a “simple face.” This graphic enables employees outside L&D to rapidly understand the goals and tools your organization will use to develop employees. It also lets employees see how they can expect to be supported throughout their careers. If your organization is moving from a traditional learning model to a continuous one, then the visual can also be a tool to discuss the transition. See Figure 2 for an example of how BJC HealthCare explains its learning architecture.
The second element is to create a plan for discussing your learning architecture as a business solution and a related plan for discussing it with your learning audience. As a business tool, it is important to position L&D as having a set of rules that defines how the organization selects and develops tools, content, and learning programs. To the learning audience, it is important to broadcast that L&D is there to make sure employees have the development opportunities they need to grow professionally and be an asset to the organization.

Figure 2: The "Simple Face" of L&D from BJC HealthCare

Recipe (cont’d)

The second element is to create a plan for discussing your learning architecture as a business solution and a related plan for discussing it with your learning audience. As a business tool, it is important to position L&D as having a set of rules that defines how the organization selects and develops tools, content, and learning programs. To the learning audience, it is important to broadcast that L&D is there to make sure employees have the development opportunities they need to grow professionally and be an asset to the organization.
Bersin Blue Plate Special: Yum! Brands Implements Blended Learning to Create a Consistent Dining Experience

Yum! Brands is one of the world’s largest restaurant companies, with 39,000 Taco Bell, KFC, and Pizza Hut restaurants operating in more than 100 countries, and generating more than $13 billion in annual revenue. It takes more than 1.4 million employees to keep these restaurants clean, and to cook and serve food in a welcoming environment.

Keeping the experience uniform across different countries and cultures is important to business success. Creating this uniformity requires a learning environment that provides consistent, high-quality development and training—an enormous task. Another challenge facing the company is low retention rate in an industry known for high turnover. The open question at Yum! became whether improving learning and development within the company would lead to improved retention and business results.

Historically, each of Yum!’s three marquee restaurant brands developed—and delivered—its own training. Even within regions, and from restaurant to restaurant, training was inconsistent. Some restaurant managers tracked development and training using handwritten notes in personnel files, whereas others improvised with spreadsheets. As a result, it was difficult to measure a learning program’s effectiveness across the organization.

To transform its learning and development organization, Yum! implemented a new solution it branded as the “Learning Zone.” The platform was designed to manage learning across the employee lifecycle. As such, the learning and development program needed to encompass not only traditional educational learning—such as food-handling courses—but also on-the-job environmental learning such as online access to checklists, recipes, and assessments. An integrated communication platform also enabled scheduled and impromptu meetings and discussions across time zones and countries. This allowed, for example, managers to share ideas and discuss solutions to problems they were facing.
Initially tested with just one brand, the new learning platform is now being rolled out globally. Thus far, the results have been impressive. Today, more than 21 online courses are completed every minute, translating to 30,000 courses completed each day.

This solution has led to tangible business results. In locations where the Yum! Learning Zone is heavily used, there has been a significant uptick in individual restaurant hospitality scores and employee retention. “The hospitality score, in some stores, has improved by two and a half percentage points, which is a big jump in our world,” says the company’s director of learning technologies. “We have also seen an increase in ‘refer a friend’ scores to become team members, as our associates are more comfortable, confident, and happy in their roles.”

Bersin Blue Plate Special: Yum! Brands Implements Blended Learning (cont’d)
Entrée #3: Operational and Compliance Learning

As business has become more global, more social, and more interconnected, operational and compliance training has become increasingly complex. The reality is that all organizations must engage in some form of operational training. This can include everything from onboarding to safety and regulatory compliance training. Organizations need to perform this operational training well, especially because lapses in compliance—and by extension compliance learning—can introduce risk and lead to substantial fines, penalties, and legal action. Although these are age-old worries, in today’s highly interconnected environment, lapses can go viral in a matter of hours, impacting public opinion and damaging a company’s bottom line.

This type of training is also essential because these learning exercises are one of the few times that organizations will have a captive audience of large groups of employees together at one time. If operational training, and by extension compliance training, are done well, then they can help reinforce the emphasis the organization places on learning, and thus underscore the organization’s learning culture. As such, performing this type of training well should also be treated as a core part of supporting your learning organization’s brand.

The Operational and Compliance Learning Landscape

Today, organizations must contend with regulatory bodies from multiple countries, international organizations, and state and local agencies. Additionally, compliance learning has taken on a wider meaning, having an impact on operation-critical issues such as quality control and employee safety areas that can have a profound effect on costs and employee productivity. Finally, compliance learning impacts an organization’s culture by establishing expectations and acceptable behavior around business ethics and codes of conduct.

This underscores the importance of operational and compliance learning. Solutions can be either customized or off-the-shelf content, and may include a variety of learning paradigms including education.
(instructor-led sessions or online training and written exams), experience (on-the-job training), environment (job aids or performance support tools), or exposure (communities of practice). Regulatory compliance, for its part, requires a detailed auditing trail, which can make the use of traditional educational approaches valuable. That said, the use of continuous learning approaches (discussed in the previous section) are also appropriate, because these resources can be rapidly evolved, accommodating the particular need of compliance and operational learning to be regularly updated to reflect new rules and regulations.

Increasingly, organizations are leveraging e-learning and online gamification solutions to replace or reduce instructor-led training, resulting in cost savings. Generally speaking, on-demand training enables employees to participate at a time that is best suited to them—and minimizes the time away from their primary job. Web-enabled platforms also enable learning executives to scale offerings quickly without the need to schedule more teachers and book more classrooms. In addition, results of questions and quizzes given within the context of e-learning can be shown to governance bodies to indicate that employees appeared to comprehend the compliance materials given to them.

Many organizations use comprehensive learning management systems to manage the breadth of operational and compliance learning offerings. These software platforms can help organizations integrate disparate learning solutions, enable the delivery of content, measure results, manage certifications, and provide the all-important audit and reporting process.
Recipe

**Designing an Operational and Compliance Learning Program**

**Ingredients**

- L&D leaders with a substantial commitment to high-quality compliance training that develops employees and does not just satisfy minimum requirements
- L&D managers with strong vendor relationships
- Understanding of various laws, rules, and regulations with which an organization needs to remain in compliance
- Understanding of the knowledge, skills, and competencies required for your employees to meet compliance standards

1. **Understand and quantify the cost of noncompliance.** The best way to put value on a compliance program is to calculate the cost of noncompliance. This will allow you to justify investing in the appropriate learning approaches and help you gain organizationwide acceptance of the compliance solutions.

   Some questions to ask as you calculate the cost include the following:
   
   - What would be our legal costs if we were found to be out of compliance?
   - What revenue would be at risk if we were not compliant?
   - What would be the impact to our brand reputation if we were not in compliance?
   - To what extent would our corporate officers risk legal troubles if we were out of compliance?
Recipe (cont’d)

2. **Audit your current operational and compliance learning programs.**
   This will avoid duplicated efforts, potentially leading to decreased costs.
   Tackling compliance issues regulation by regulation can lead to adding
   new processes for each regulation when, in fact, one solution can cover
   multiple regulations / compliance issues.\(^{12}\) As you continue the recipe,
   continually reassess for overlap or duplicated efforts.

   Some questions to ask as you analyze your existing operational and
   compliance learning approach include the following:\(^{13}\)
   \begin{itemize}
   \item What is the ideal state of your compliance program?
   \item How would it be different than it is today?
   \item What would you decrease or discontinue, and why?
   \item What would you expand, and why?
   \end{itemize}

3. **Identify specific training requirements based on the three principal
   drivers of operational and compliance training.**
   \begin{itemize}
   \item The first of these drivers is **regulatory compliance**, including training
     that focuses on legal compliance and worker safety.
   \item The second driver is **operation-critical** issues, which include training
     on critical topics such as safety and quality control.
   \item The final driver is **organization-imposed** issues, which involves
     training to avoid litigation and maintain workplace quality standards.
     Reach out to stakeholders in legal, HR, and the business units to
     identify objectives for each driver.
   \end{itemize}

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\(^{12}\) Source: “Avoid duplicated efforts to cut the cost of regulatory compliance,”

\(^{13}\) Source: “The long-term consequences of not addressing compliance programs today,”
4. **Prioritize each type of training based on strategic importance, and determine priorities by analyzing cost, financial impact, and legal requirements.** When conducting this analysis, identify the target audience of each type of training, as well as the preferred delivery method, to help you better quantify the cost.

5. **Reach out to regulators as you build your solutions.** Asking for input on regulatory compliance issues can prevent problems from developing later. Indeed, one recent survey found that 65 percent of compliance officers expect to increase their outreach to regulators this year.

6. **Identify content and appropriate learning paradigms.** A number of off-the-shelf programs are available for some of the more standard types of operational and compliance trainings. Consider whether your organization already owns in-house solutions or whether off-the-shelf options are appropriate. In addition, consider the breadth of potential learning paradigms (education, experience, environment, and exposure) that can be used to make learning maximally effective (see “Entrée #2: Continuous Learning” on page 15 for more details on the different types of learning approaches available). Further, note that regulators can potentially provide out-of-the-box solutions, quizzes, and other materials, saving money in lieu of developing or purchasing content.

To our previous point, do not forget to consider the quality of this training—do not let cost and “checking the box” be the only drivers. Remember that a large portion of your employee population will take this training; do not leave them with a bad taste in their mouths from training that does not reflect well on your learning organization.

Finally, based on the content, reassess costs, potential overlap, and feasibility, and decide on the appropriate solution.

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16 Ibid.
7. Test and roll out. It is essential to verify functionality, content, and delivery method in a test phase, as well as to identify who within L&D will be responsible for monitoring enrollments, tracking, and auditing—as well as enforcement of completion. Partner with the legal department on internal audit procedures, as they will typically be the function liaising with regulatory bodies.

8. Assess the effectiveness of learning resources. Did the content and solution meet objectives and requirements? How effective was the delivery method? Survey employees on effectiveness and quality of training. For example, did it have an impact on employee development? Or was it simply a matter of checking off boxes to satisfy legal requirements?

9. Track compliance and certification dates. Some compliance programs or certifications have expiration dates. Make sure you have the reporting in place to alert individuals, managers, and HR when certifications need to be renewed.

Bersin Blue Plate Special: Allina Hospitals and Clinics Uses Continuous Learning to Efficiently Deliver Compliance Training

Allina Hospitals and Clinics runs 11 full-service hospitals and 90 clinics across Minnesota and western Wisconsin. The system’s 24,000 employees and healthcare professionals—plus an additional 5,000 associated physicians—provide care during 100,000 hospital admissions and 4 million clinic visits. In addition to performing 35,000 surgeries and delivering 11,000 babies, the system also manages more than 800,000 pharmaceutical prescriptions per year—and they do so 24 hours per day, 365 days per year. Healthcare is a complex business in which highly trained professionals must stay up to date on the latest research and comply with a wide range of government regulations on patient care and privacy.
As Allina expanded its business, the organization committed itself to using learning to help it provide the highest level of care available anywhere. However, providing formal classroom training in an organization with employees who work different shifts at 101 different locations proved to be logistically complex and expensive.

To address these challenges in a highly accessible and cost-effective way, Allina Hospitals and Clinics launched a pilot learning project to train its staff to use a sophisticated electronic medical records solution. This early program used an online platform to coordinate and deliver 39,000 online and classroom instructor-led courses. The success of this program led Allina to use an integrated learning management platform to monitor, audit, and deliver nearly all of its learning programs. When it comes to regulatory compliance, the entire suite of e-learning options can be fully audited to ensure compliance with rules overseen by the Centers for Medicare & Medicaid Services, U.S. Drug Enforcement Administration, and U.S. Environmental Protection Agency.

Allina has also taken its learning approach one step further, using social learning and online forums within their learning platform to supplement their offerings. These “communities of practice” enable employees to share documents and other resources, join in online discussions, and participate in Q&A boards. Employees can also collaborate on the creation of wikis that other employees can consult as needed.

The learning program has been so successful that physicians outside the Allina system are now signing up for select Allina offerings and attaining required certifications. The cost savings are impressive. For each course that migrates from the physical classroom to an online environment, Allina estimates that it saves approximately $250,000.
Entrée #4: Modern Performance Management

If you were to select a random employee at a random organization and ask her about the importance of performance management, the question would almost certainly elicit a groan and stories of misdeeds and good intentions gone awry. There are no two ways about it: Employees generally revile traditional performance management—and they are not alone. Its value is also regularly questioned by frontline managers and senior leaders alike.

Part of the problem with classic performance management—which remains in place at most organizations—is that it is seen as a series of distinct annual steps that occur outside the day-to-day manager-employee relationship. The three primary steps include goal-setting, assessing, and rewarding. This process was intended to build a high-performance organization by evaluating people on whether they achieved their annual goals. The highest performers would be rewarded, whereas the lowest performers—at least in some well-known organizations—would be shown the door. Although this might sound like a fine and fair meritocracy on paper, in reality the process in many organizations is broken. One problem is that goals are set and rarely updated to reflect reality. Another is that performance feedback is given infrequently and inconsistently. As a result, when assessment time arrives, the criteria for performance are unclear, and employees have little understanding of their performance to date. It is no wonder that many managers and employees have found the process highly subjective and not useful.

Today, many organizations are attempting to evolve performance management to make it more relevant—less focused on assessment and more focused on coaching and development. This modern perspective operates under the theory that performance is enhanced through a series of ongoing activities that are, in fact, part of the very fabric of the manager-employee relationship. These include:

- Goal-setting and ongoing discussion of goals
- Regular managing and coaching
- Development planning as a part of regular check-ins
- Rewarding and recognizing that occur on a daily, weekly, monthly, and yearly basis
As a result of these regular interactions, managers are also expected to engage in an ongoing assessment of performance—as opposed to just an annual review. The approach will vary by organization but can include monthly, quarterly, biannual, or annual feedback sessions. In addition to these established meetings, informal and regular feedback is often given from a variety of individuals knowledgeable about an employee’s performance. What is discussed also varies by organization but can include goals, responsibilities, capabilities, and readiness for promotion.

This type of performance management can have a powerful impact on employee retention. Consider a U.S. Department of Labor study that found that nearly two-thirds of working Americans leave their jobs because they don’t feel appreciated.\textsuperscript{17} Another survey by Harris Interactive found that two of the top four reasons why people leave their jobs are:

- “My efforts are not recognized or appreciated”: 46 percent of respondents
- “Not enough career advancement opportunities”: 42 percent of respondents\textsuperscript{18}

The ultimate goal of ongoing performance management is to create a high-performance organization that is tightly aligned with business strategy and culture. This new model seeks to develop employees to their fullest potential through regular coaching and development. The overriding principle is that ongoing development and feedback are essential to organizational success.

**The Modern Performance Management Landscape**

Although memories of traditional performance management can cause employees and their managers to wince, the benefits of modern performance management can be undeniable and profound. Whereas traditional performance management could be almost adversarial


between employee and manager, modern performance management—with its regular check-ins, goal-setting, rewards, and recognition—is grounded in teamwork and shared success.

One of the primary benefits of modern performance management is an organization that is better aligned throughout the year on business goals. The sense of purpose that comes from shared goals enhances business and talent outcomes. In recent Bersin research, we found that organizations were four times more likely to be in the top quartile of the Business Performance Index if employees felt strongly that:

- Team goals are clear to members of those teams.
- The connection between team goals and the organization’s goals is clear to employees.
- Employees understand how their work connects to the organization’s goals.

More tangible benefits are realized when companies create continuous goal clarity. Further research conducted by Bersin reveals that organizations in which employees revise or review their goals quarterly (or more frequently) were at least three times more likely to be in the top quartile of the Business Performance Index than those that do not. These goal-oriented companies are also more skilled at managing costs.

The partner to regular feedback and goal-setting is coaching and development, and when organizations facilitate this manager-employee exchange, it helps employees feel supported. This coaching support also...


21 The “Business Performance Index (BPI)” comprises employees’ responses to questions on employees’ own level of engagement (as measured by four separate questions and then averaged into a single variable), and the organization’s level of customer satisfaction, cost structure (as compared with competitors), market leadership position, and profitability (as compared with the previous year).

leads to improved business results. For example, Bersin research has shown that organizations in which senior leaders coach “very frequently” have 21 percent higher business results than organizations in which leaders coach “rarely” or “never.”

By engaging in coaching, senior leaders are also establishing a culture of coaching, and this, too, leads to improved business outcomes. These organizations report 13 percent stronger business results and 39 percent stronger employee results.

Modern performance management, with its frequent manager-employee check-ins, also encourages more recognition, resulting in higher engagement levels. Bersin research has found that 71 percent of highly engaged employees work in organizations at which their peers are recognized monthly or more frequently. Further, our research finds that the organizations in the top quartile of our Business Performance Index are much more likely to have highly engaged employees.

Last, but not least, modern performance management also helps senior leaders gain a clearer picture of their talent pools’ skills and abilities—or lack thereof. This insight enables leaders to rapidly hire new talent to fill in gaps or develop skills internally based on a firm’s overriding business strategy.

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24 Ibid.


26 Ibid. Specifically, our research finds that of the top quartile of organizations in our Business Performance Index, 68 percent of employees were highly engaged.
Recipe

**Developing a Modern Approach to Performance Management**

**Ingredients**

- Commitment by senior leaders to transform—not tinker with—performance management
- Several flexible-thinking leaders capable of moving from performance management as a ranking process to an enablement and improvement tool
- HR leaders to participate in brainstorming and give feedback on proposed changes
- Project manager to maintain momentum on the efforts to change performance management
- Communications expert able to assist in crafting messages around performance management changes
- Focus groups of employees willing to give feedback on performance management changes
- Four to six months to conduct a thorough analysis, develop recommendations, and prepare for implementation

1. **Engage senior leaders and HR to develop a performance management strategy.** This will help identify gaps between your current performance management approach and your desired outcomes. Questions to ask to develop this strategy include:
   
   - What is the purpose of performance management at your organization?
   - What is your organization’s performance management philosophy?
   - How should performance management align with the organization’s business and talent management strategy?
2. **Translate your performance management strategy into activities.**
(Please note that any of the following recommendations can be tested as part of a pilot with a smaller group before rolling the approach out to the entire organization.) As you are creating these activities, identify what, when, and where specific actions are to take place—and how it will reinforce your organization's performance management, talent, and business strategies.

Specifically, consider how your organization will:

- Set guidelines for how goal-setting and manager-employee discussions should unfold throughout the year
- Build managers' capabilities to coach and give feedback
- Design a recognition and rewards approach that enables employees to recognize each other's accomplishments on a daily, weekly, monthly, and yearly basis
- Integrate development planning activities so they are part of the more formal performance discussions
- Create a performance feedback / assessment process that is fair, recognizes high performers, encourages performance improvement and development, and aligns with your organization's values and principles

3. **Clarify how different employee groups—leaders, managers, and employees—will be impacted by performance management transformation.** One technique, borrowed from the world of marketing, is to build a composite character for each layer in your organization. For example, consider how a midlevel manager will experience the process of setting and revising goals throughout the year. What support will she need from HR and from her manager at different points throughout the year? What tools might she need?

Once a draft of these composites—and their underlying assumptions—are developed, share them with a broad range of employees and solicit feedback. Then adjust your planned performance management activities as needed.
Recipe (cont’d)

4. **Identify who within the organization will be responsible for which performance management activities.** Potential owners and contributors from within HR will include members of talent management, compensation and benefits, and learning and development. Other participants will be senior leaders, managers, and engaged employees.

5. **Determine whether external vendors are needed.** Potential solutions can do the following:
   - Track, monitor, and align individual and team goals
   - Enable manager and peer-to-peer recognition and feedback
   - Integrate with your other learning solutions to help employees achieve goals
   - Measure achievement and results
   - Manage performance reviews

Conduct a careful vendor selection process that prioritizes finding vendors willing to help your organization implement its strategy and processes. Invest in developing a comprehensive implementation plan that will enable your organization to address unexpected implementation challenges.

6. **Develop a comprehensive change management approach.** Collaborate with any internal communication professionals who are available to help you refine your plan and messaging.
Bersin Blue Plate Special: Media-Saturn Uses Performance Management to Align Employees and Better Understand Talent

Media-Saturn is one of the largest electronics retailers in the world, with successful online operations and more than 950 stores across 17 countries in Europe and Asia. The company’s 65,000 employees work in more than 120 countries, and operations generate more than $28 billion in annual revenues. Despite its global presence, each business unit, and even each individual store, operates with a high degree of independence. Individual store managers, for example, are in charge of hiring, training and development, and inventory management at their locations.

Although autonomy has been a core driver of financial performance at Media-Saturn, it also led to haphazard and uneven performance management across the organization. Previously, many stores lacked tools to measure goals, achievements, learning, and feedback. Other stores cobbled together their own rudimentary solutions using spreadsheets and word-processing documents. The lack of a cohesive system meant the company had limited insight into which employees were ready to move up, and which ones could benefit from coaching, learning, and goal-setting. Equally important, the company was not always aware of which employees already possessed the skills needed to advance along their career paths.

“We really needed to get the right people in place and make sure they had the right skills and were good entrepreneurs, but we also had to understand their skill sets,” stated the company’s head of HR and payroll solutions. “Additionally, Media-Saturn needed a way to develop the talent of their employees, helping them move from a shop-floor assistant up the ladder to country manager if they so desired.”

To fully develop its talent—particularly among its top 1,500 managers—Media-Saturn’s HR leaders searched for a solution that could help them align performance management across the organization. Equally important was the ability to manage their learning, training, and performance management from within a single platform. So, although stores would still operate with a great deal of independence, they would have a common set of cloud-based tools and solutions available to them. One of Media-Saturn’s primary goals was to develop its own leaders internally so they could reduce costs spent searching, recruiting, and hiring people from outside the company.

By putting assessments online, the platform enabled Media-Saturn’s store managers and talent management teams to identify which employees had skills gaps. Managers could then address those skills through coaching and training programs as well as job rotations—then track improvements online.

Today, employees and managers have shared online access to goals and goal achievement. If learning deficits emerge, employees and managers can use the same portal to track down continuous learning opportunities—both formal and informal—to improve abilities. Meanwhile, both managers and employees have a real-time dashboard to track and measure progress.

Although specific figures are proprietary, since the program was implemented, Media-Saturn has seen an increase in employee retention and a decrease in fees paid to outside headhunters. “With the system in place we are able to know what our employees can and cannot do,” says Media-Saturn’s head of HR and payroll solutions. “And that dramatically reduces our risk.”
Conclusion

Talent management has become one of the most essential assignments for any organization doing business today. Finding the most appropriate talent for each job means using tools and networks that did not even exist until recently. Today’s employees have high expectations for the workplace. They want to leverage their careers to maximum effect.

Developing employees through performance management techniques such as regular check-ins, feedback, goal-setting, and recognition can not only help satisfy that employee demand but can also be a competitive advantage. In just one example, research from Bersin by Deloitte has found that organizations that have employees revise and review their goals quarterly (or more frequently) were more than three times more likely to be in the top quartile of our Business Performance Index than those that do not.

Integrated with that type of performance management is the need to provide continuous learning to employees across all platforms available to them. Although this can include traditional classroom learning, it also leverages e-learning, social learning, cross training, on-the-job experience, and any other resources that can help. It is a learning and development organization’s challenge to develop those experiences as part of an integrated learning solution. Finally, applying that type of continuous learning to operational and compliance learning can help establish a powerful culture of learning within an organization.

These recipes are a first step in establishing a fully integrated talent management plan and reaping the benefits of a fully developed, fully engaged organization.
Social Sourcing

- Tools that survey industry-specific chat rooms and message boards can reveal how skilled a candidate is at solving certain problems. Some vendors can scan a wide range of social media looking for candidates, including not only the largest networks but also niche and social video sites.

- Talent acquisition organizations would be remiss if they failed to create a robust online-based sourcing strategy for current employees.

- Identify the critical skills and capabilities needed across the organization. This process should be initiated by surveying hiring managers, workforce planning experts, and business leaders. Not only will this help focus the talent acquisition organization on a clear set of goals going forward, but it will also ensure alignment with key stakeholders in the business.

Continuous Learning

- Continuous learning is different from other learning models in two important ways: (1) it accounts for employees' immediate, intermediate, and transitional learning needs, and (2) it facilitates a holistic approach to development across learning paradigms.

- Employees increasingly require information that is new, timely, and delivered in small, bite-size chunks. With a continuous learning model, informality and simplicity can be built into learning assets—often at a lower price. Further, with these types of assets, employee development plans can leverage a variety of learning assets to make the learning experience more tailored.

- Clarify the needs of the business and the audiences that L&D serves. If your L&D organization lacks a clear understanding of the most pressing business challenges and L&D's role in helping address them, now is the time to obtain that understanding. Engage in conversations with business leaders about their most pressing current needs and what they anticipate them to be in the future.
Recipe Notes: Key Takeaways (cont’d)

Operational and Compliance Training

• If operational training, and by extension compliance training, are done well, they can help reinforce the emphasis the organization places on learning, and thus underscore that the organization has a learning culture. As such, performing this type of learning and training well should be looked at as a core part of supporting your learning organization’s brand.

• Organizations are leveraging e-learning and online gamification solutions to replace or reduce instructor-led training, resulting in cost savings. Employees can participate at a time that is best suited to them—without the need for costly travel or taking employees away from their primary jobs during key times.

• Identify specific training requirements based on the three principal drivers of operational and compliance training. These include regulatory drivers such as compliance and worker safety; operation-critical issues such as quality control; and, finally, organization-imposed drivers such as litigation avoidance and workplace quality.

Performance Management

• Performance is enhanced through a series of ongoing activities that are part of the very fabric of the manager-employee relationship. These include:
  o Goal-setting and ongoing discussion of goals
  o Regular managing and coaching
  o Development planning as a part of regular check-ins
  o Rewarding and recognizing that occur on a daily, weekly, monthly, and yearly basis

• Organizations that have employees revise or review their goals quarterly (or more frequently) were more than three times more likely to be in the top quartile of the Business Performance Index than those that do not.

• Modern performance management, with its frequent manager-employee check-ins, also encourages more recognition, resulting in higher engagement levels. Bersin research has found that 71 percent of highly engaged employees work in organizations at which their peers are recognized monthly or more frequently.
Appendix I: Glossary of Terms

Blended Learning

“Blended learning” is the combination of different training “media” (e.g., technologies, activities, and types of events) to create an optimum training program for a specific audience. Quite simply, blended learning means taking a variety of delivery types and crafting them into an integrated program designed to solve a particular training problem.

Blended programs can consist of a few or many elements mixed together to meet a particular audience need. The *Blended Learning Book* by Josh Bersin defines blended learning in detail and discusses the 16 different media elements that comprise blended learning programs.

Business Performance Index (BPI)

The “Business Performance Index” (BPI) comprises employees’ responses to questions on employees’ own level of engagement (as measured by four separate questions and then averaged into a single variable), and the organization’s level of customer satisfaction, cost structure (as compared with competitors), market leadership position, and profitability (as compared with the previous year).

Continuous Learning

“Continuous learning” refers to the ongoing development of skills, abilities, and knowledge through different means (including work on the job, training, experiences, communications, et al), and is part of an individual’s ongoing professional life at work and outside of work.

Crowdsourcing

“Crowdsourcing” refers to the method of acquiring necessary services, content, or ideas by asking for input from a large community of individuals, often from an online populace. Crowdsourcing is different from “outsourcing,” which means turning over a business function or process to a third-party organization. As it connects the efforts of various entities, crowdsourcing allows a small amount of effort to lead to a much greater outcome or product. The word “outsourcing” was coined in 2006.
e-Learning

“e-Learning” can be defined as any form of electronically delivered learning material with an emphasis on Internet-based technologies.

Learning Architecture

A “learning architecture” is an organization’s unique map of agreed-on learning needs, learning strategies, and delivery strategies for its training. This gives designers, trainers, and managers a clear view of what types of problems the organization will solve, how they will solve them, what tools they need, and which approaches the organization will take. It deliberately limits the organization’s options by deciding how and where the training organization will focus its efforts, and it builds on the organization’s culture and history of learning.

Onboarding

“Onboarding” refers to the process of hiring, orienting, and immersing new employees into their roles and into the organization’s culture.

Social Learning

“Social learning” is a blended learning model that uses social media to enhance the learning experience. Social learning produces a collaborative learning environment when synchronous with asynchronous approaches are combined. The goal of social learning is to create a community of learners who work together during the class. When the class is over, that community can then evolve into an ongoing and interactive community of practice and continue learning and collaborating when they are back on the job.

Social Media

“Social media” is an umbrella term for using computer-mediated communications channels as new forms of media. Social media sometimes refers only to newer tools such as blogs, microblogs, wikis, podcasts, and video / media libraries (e.g., YouTube) but can also include older tools (such as online forums and instant messaging). Like all media, the point of social media is to share and distribute information. Social media expands the flow of communications beyond simply being “one to one”—to “many to many” and “one to networks.”
Social Networking

“Social networking” represents the use of person-to-person networking approaches that facilitate collaboration, learning, knowledge-sharing, the location of experts, and organizational communication. Social networking refers to the use of web tools for individuals to post profile information, share comments and notes with each other, collaborate, and join groups—similar to the use of Facebook and LinkedIn in the consumer market.

Social Sourcing

“Social sourcing” refers to the process of locating and engaging of active and passive candidates through the use of social media, web platforms, and networks for the purposes of recruiting. Recruiters use Inter-resident social media profiles, blogs, and online communities to find and search for passive candidate data and information. “Social sourcing” is sometimes extended to include distribution of jobs via social media platforms, networks, or crowdsourcing to locations where job seekers and others share job openings within their online social networks.

Talent Community

A “talent community” means different things in different organizations, but we define it as an online and interactive community of candidates interested in a specific organization. In these communities, potential candidates can interact with other candidates and existing employees at an organization.

Appendix II: Table of Figures

**Figure 1:** Bersin by Deloitte Continuous Learning Model

**Figure 2:** The "Simple Face" of L&D from BJC HealthCare
About Us

Bersin by Deloitte delivers research-based people strategies designed to help leaders and their organizations in their efforts to deliver exceptional business performance. Our WhatWorks® membership gives FORTUNE 1000 and Global 2000 HR professionals the information and tools they need to design and implement leading practice solutions, benchmark against others, develop their staff, and select and implement systems. A piece of Bersin by Deloitte research is downloaded on average approximately every minute during the business day. More than 5,000 organizations worldwide use our research and consulting to guide their HR, talent, and learning strategies.


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