

HR Executive of the Year Issue

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HR Tech
Conference
Edition

Inclusion is key for
David Rodriguez,
Marriott International's
global CHRO and this
year's HR Executive
of the Year. PAGE 14

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Home Here
for
Everyone’

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October 2019

COVER STORY

'A Home Here for Everyone'

BY ANDREW R. MCILVAINE

Marriott International Global CHRO David Rodriguez is credited with fusing a people-centric mindset with a deep business acumen to bring HR success to the world's largest hospitality company. *HRE* sat down with Rodriguez, this year's HR Executive of the Year, to learn about the many innovations he has led at Marriott, and find out what other HR leaders can learn from his pioneering example. Page 14

2019 HR Honor Roll Winners 19

This year, we honor three outstanding HR executives on our HR Honor Roll: Zoë Harte, senior vice president of human resources and talent innovation at Upwork; Angela S. Lalor, senior vice president of human resources at Danaher Corp.; and Ruth Stricklen Pullins, chief human resources officer at Truman Medical Centers. Though the three work across different industries and all have made unique contributions to their respective HR functions, they all share a passion for bringing out the best in their organizations' people—supported by an impressive record of accomplishments.

HR Tech

Moving HR Forward 23

BY HRE STAFF

Our annual Top Products awards honor 10 of the best new HR-tech products on the market, which offer innovative solutions to the wide range of challenges HR leaders face. Also in this section, learn about a new conference from *HRE* and the creators of the HR Tech Conference, and hear from HR Tech Influencers about common mistakes in deploying new tech solutions. Columnists Jason Averbook and Josh Bersin also explore the reinvention of HR and the potential of agile.

Health & Benefits Cost Crushers 54

BY CAROL PATTON

Employers of all sizes and across industries

are facing the burden of rising healthcare costs, prompting some to make bold changes to lower costs without affecting the quality of care—sure to be a hot topic at the Health & Benefits Leadership Conference in April. Also in this section, our Beyond Benefits column debuts from the new chair of HBLC, Kathryn Mayer.

HR Leadership Making Pay More Timely 57

BY JULIE COOK RAMIREZ

According to recent research, nearly 80% of American workers are living paycheck to paycheck, a stat that has driven some employers to explore ways to pay their employees sooner. While

pay-on-demand programs can help employees with cash flow, employers and experts caution that such efforts must be carefully considered to ensure employees are prioritizing financial wellness.

Talent Management Executive Onboarding, Upgraded 59

BY MAURA CICARRELLI

A majority of North American executives reported that they received no formal onboarding for their new roles, a finding that highlights the performance-preparation gap many new leaders experience. Experts advise HR and business leaders to collaborate on an executive-onboarding strategy that will better prepare new executive hires for their responsibilities and the company's culture.



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Previewing the 2019 HR Tech Conference

Learning about emerging HR technologies, and networking with industry leaders, can prime your business for success. BY STEVE BOESE

There are two sayings about business that I thought about when creating the HR Technology Conference & Exposition® agenda this year—one that has been part of the HR consciousness for quite a long time, and another that has emerged more recently. The first is the now-ubiquitous “Our people are our greatest asset,” while the second is “Every company is a technology company.”

While these maxims are both important on their own, I think it’s helpful to consider them together—how their underlying messages and the ensuing strategies they lead organizations toward are driving HR and business leaders today. I’d argue that, for most organizations, competitive advantage derives largely from their people—enabled by the ability of HR and other leaders to create systems, processes, environments and cultures that put people in the best position to succeed. I’d also point out that most organizations have seen (or are seeing) their industries, businesses, products and services significantly impacted and even disrupted by technology in its many manifestations.

The conclusion? If every company now has to morph into a “technology” company in order to better compete, and if sustainable, competitive advantage is generated and driven by people, it’s never been more important for HR leaders

to make the best decisions around the workplace tools and technologies they select, deploy and encourage their people to leverage for success at work (and outside of work, in many cases). With that top of mind, we built out opportunities at HR Tech for HR leaders to share knowledge, gather information, hear compelling experiences, and network with peers and HR-tech industry leaders—all to help them meet their business, people and technology challenges.

Information and Knowledge

With over 75 educational sessions covering every important HR-technology domain and all-star keynotes from *Shark Tank*’s Barbara Corcoran, HR-industry thought leaders Josh Bersin and Marcus Buckingham, and future of work expert Ravin Jesuthasan, no matter what area of HR technology you’re most interested in learning about, HR Tech has it covered. No HR-technology event in the world brings together a better and more complete set of HR and HR-tech leaders ready and willing to share their knowledge, insights and recommendations. New to the HR-tech market? Be sure to attend our deep-dive “Market Landscape” sessions, where industry experts like Ben Eubanks, Madeline Laurano, Trish McFarlane and more will equip you with the information

you need when thinking about new HR-technology investments for your organization in areas like payroll, talent acquisition, analytics, learning, AI technologies and more.

Compelling Experiences

The best way to learn about new technology is to see it up close and learn firsthand from those creating the next generation of HR technology. HR Tech offers an unparalleled opportunity to do just that in our world-famous HR Technology Expo—which, once again, will feature over 400 exhibitors showcasing all things HR tech. Whether you are looking for new and improved technology for payroll, benefits, recruiting, talent management, analytics, virtual reality or artificial intelligence, the providers you want to see—and the technologies you need to understand—will be at HR Tech. And, make sure to allot some time for our other special experiences in the expo, such as the industry-leading start-up Pitchfest, the HR Tech Talks stage and a live recording of the HR industry’s leading podcast, the *HR Happy Hour Show*. Simply put, the HR Tech Expo alone is worth the investment of attending HR Tech.

Networking Opportunities

It is often said that the ongoing value from attending events like HR Tech derives from the connections you make with colleagues, peers and industry

leaders. Nowhere is better for making these connections than HR Tech. With every important HR-technology provider in attendance; a collection of industry thought leaders and influencers presenting throughout the four days of the event; and a set of networking and social activities before, during and after hours at the conference, there is no doubt that you will be able to find, connect with and share knowledge with HR and industry leaders. And, stay tuned for some special, yet-to-be-announced new features that will take connecting and networking to the next level. Remember to join our HR Technology Conference LinkedIn Group, connect with @HRTechConf on Twitter and follow the #HRTechConf hashtag to join in the ongoing HR Tech conversations.

The 2019 event is shaping up to be the best yet in the 20-year-plus history of the HR Technology Conference. It is truly the only event of its kind in the world with the depth, breadth and scale to provide HR leaders the variety of information, experiences and connections to empower them to make the best HR-technology decisions for their people and their organizations. Come to HR Tech and leave ready to support your organization’s most important assets—your people—with the tools and technologies to enable them to achieve success. I hope to see you in Las Vegas!

Steve Boese is a co-chair of the HR Tech Conference. He can be reached at sboese@lrp.com, or send questions or comments to hreletters@lrp.com.

HR Technology Conference & Exposition® will be held Oct. 1-4 at the Venetian in Las Vegas. For more information, visit www.hrtechnologyconference.com.

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Trusting Data to Drive Engagement

Investing in a single system-driven data foundation boosts agility across the employee experience, which translates into a smart business strategy. **BY TOM STARNER**



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Trusting Data to Drive Engagement

Dramatic global economic changes continue to reshape the workplace, workforce and the nature of work itself.

In fact, the World Economic Forum found in a recent survey that 44% of global senior executives polled say the “changing nature of work/flexible work” is far and away the number one trend driving overall change in the global economy.

With that, the emphasis is increasingly toward making the best possible decisions in order to effectively manage talent and boost employee engagement. It has become more important than ever for human resource leaders to both streamline the employee journey and empower employees on each step of their interaction with their companies, especially in:

- **Recruiting**—processes communicate candidate expectations and assessment criteria
- **Onboarding**—establishes early norms around company culture
- **Compensation**—promotes transparency and fairness
- **Career development**—supports ongoing employee development
- **Retention**—allows for employees to find paths forward within the company while minimizing business disruption and retaining key personnel
- **Workforce planning**—gives voice to more detailed business-resource priorities, which helps substantiate employee value.

“Employers today need to rely on their systems and the huge amount of data they

generate to guide them through these important people-focused processes,” says Cristina Goldt, vice president of HCM product management at Workday. “Along those lines, an indispensable strategy for reaching that goal is to tap into a single system, with a single data source, single security model and single user experience.”

Goldt says that practically all employers and their HR departments produce far more data than they can effectively analyze to improve decision-making. In many cases, it’s a cat-herding exercise. But, with the competitive stakes for talent constantly rising, HR can no longer afford to let this golden opportunity be torpedoed by the lack of a consistent, cohesive single system. With a single system approach, in effect, HR can more easily leverage powerful processes, such as artificial intelligence (AI), machine learning and augmented analytics. “A data foundation is critical to get to machine learning, for example,” Goldt says.

“With this massive data accumulation happening today, there has to be a better way to put high-value, actionable information into the hands of people,” Goldt explains. By taking advantage of a single system’s capabilities, employers will be able to leverage data more effectively to support employees during critical moments in their employee journey, such as major life events and job changes.

Goldt says helping employees navigate workplace tasks should be simple. Yet, many of those tasks remain tedious and time-consuming, often forcing employees to search across different resources and systems, log a service ticket or call someone for information.



“The premium put on certain skills and capabilities individuals can bring is ever-evolving in this day and age.”

– John Pitstick, Senior Director of Product and Workforce Planning at Workday



“Employers today need to rely on their systems and the huge amount of data they generate to guide them through these important people-focused processes.”

– Cristina Goldt, Vice President of HCM Product Management at Workday

Goldt offers the example of a personal-leave request. If employees want to take a leave of absence—for spending time with a new child, for instance—it can be frustrating to navigate the guidelines, including how many days to take off, whom to notify and how to initiate benefits payments. In some instances, the experience might involve multiple calls into HR, separate interactions with a third-party benefits provider, emails with various co-workers/managers and an overall sense of confusion as to what needs to be completed and when.

To be truly agile, and make this process easy for workers, data needs to be native in the HR platform, not mingled into several external point systems.

“It’s difficult enough to plan a workforce with today’s constantly shifting business agenda,” Goldt says. “But without a single source of HR data, often times, HR remains in the back office manipulating data, rather than facilitating face-to-face interactions and making life easier for the workforce. And even though it’s not HR’s fault, it also can create a lack of confidence in HR as a business partner.”

According to Workday’s John Pitstick, senior director of product and workforce planning, today’s hyper-competitive talent-acquisition process is the main reason talent planning is front and center. Low unemployment rates globally (and especially in the U.S.) mean it clearly is a seller’s market. At the same time, the focus is changing on the skills many employers need to remain competitive—a true double-edged sword.

“The premium put on certain skills and capabilities individuals can bring is ever-evolving

in this day and age,” Pitstick says. He explains that a lot of that is due to changes brought about by emerging technology in the workplace, but also by opportunities to change career paths.

“People are not necessarily feeling like they have to have their career in one organization for lengthy periods of time, and that they get stronger and more diverse as employees by moving around and experiencing more,” he says.

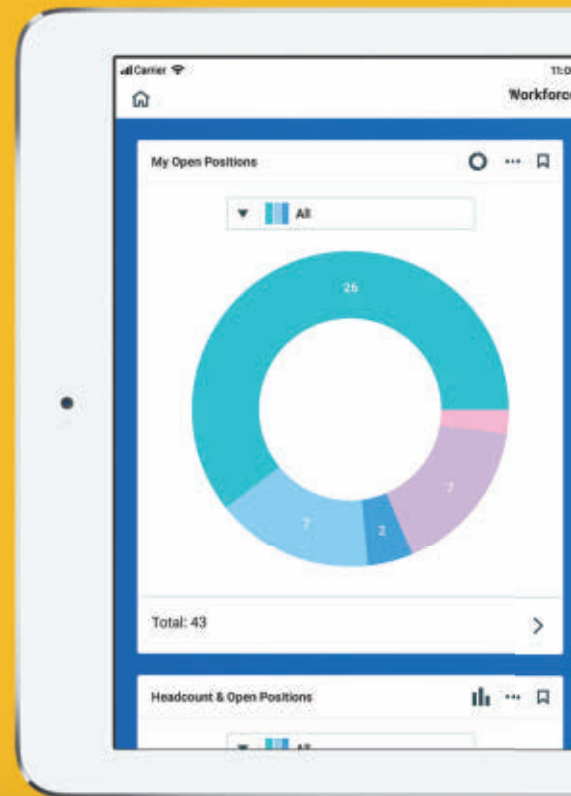
Pitstick adds that this is definitely a trend with younger generations, and the net impact is it’s becoming more of a challenge for organizations to recruit and maintain key talent. If employees are essentially the core of any company, a belief Pitstick and Workday share, they are also the biggest cost item—accounting for 70% to 80% of a given employer’s spending. According to a recent report from the Bureau of Labor Statistics, employee compensation for civilian workers averaged \$36.77 per hour worked in March 2019.

“If you take away cost being the primary driver and you put an HR lens on, then you’re talking about the most important asset in the organization,” Pitstick says. “If we don’t treat talent right, if we don’t grow talent right and if we don’t keep them happy, it will have an incredibly negative impact on the bottom line.”

Pitstick says HR can achieve workforce-planning success by leveraging different types of historical data. Most importantly, HR must understand the people trends going on in a company and pinpoint the organization’s goals and targets.

“This is a big part of getting the data right—using the data right,” he says. “It’s one thing to just swim in data; it’s quite another to use the data to make

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Trusting Data to Drive Engagement

better decisions and to monitor or manage the organization in a better way.”

Pitstick explains that when it comes to why a single data system can boost the chances of meeting workforce planning challenges, one issue is most organizations are very fragmented in their processes and fragmented in their data. You can have one group running around with spreadsheets, another group may have tried to build some homegrown systems and yet another group is leaning on finance to do a lot of the work because they have some planning tools.



“Clearly, you don’t have that consistency or the visibility across the entire organization,” he says. “Much of the challenge for HR is gaining confidence in information, getting alignment across the business, having better mechanisms to actually collaborate, having clarity on business strategies, objectives and goals—and being able to manage to that.”

Using Data to Effectively Recruit, Elevate Employees

Workday’s Goldt explains that the pace of change and the need for organizations to adapt to that change—a critical part of improving the employee experience—only continue to accelerate.

As a result, agility is even more important in terms of being able to act with speed and certainty. Fragmented point systems, by definition, only tell a part of the story, representing a limited view of the landscape, she says.

“Bringing it all together—the data, that is—from so many different sources is no small feat,” she says. “By its nature, it becomes difficult to manage and, by extension, that means it’s time-consuming to compile statistical data, to translate that into the financial considerations and to get the key metrics that you need to understand what to do next.”

True agility requires real-time, relevant data, she says. This is the challenge when data is everywhere: The time it takes to bring the information all together typically doesn’t allow HR to act fast enough. Nor does it guarantee they are seeing the entire picture because they may not know if they have combined the right data points to accurately meet the employee-lifecycle challenge.

Goldt cited a report from Aberdeen Group that found the time HR managers spend building their data story increases as the company grows. That reduces the key interactions between management and employees, she explains, negatively impacting relationships that could facilitate stronger workforce performance.

Without all the data to make actionable decisions, HR won’t have the required context to support employees in their career journey.

“Ultimately, that lack of context can undermine trust and competence in the actions that are being taken,” she says. “So, in terms of acting with speed, with agility, it prevents that. When you don’t have that data foundation, you can’t make it contextual.

“Without a single system, it’s like you are reading a book and missing some chapters,” Goldt adds. “It’s a missed opportunity because there’s so much data out there that can be wasted without a unified, single system platform.”

Having that data foundation also goes to trust and confidence, where HR has to be astute about making those connections and providing insights about people, not only to employees themselves



“While still very important, we’re beginning to see a shift and maturation in the conversation to reflect who we are as a society and how we define diversity.”

– Carin Taylor, *Chief Diversity Officer at Workday*

but also to business leaders and executives. That latter group is very important because they need the context and insightful information to make the right decisions regarding company investments in terms of employee development, she says.

“We really are seeing a huge focus on people development,” Goldt says. “It’s about making sure that employees continue to grow and meet the business outcomes at the same time. It means putting the person at the center and really understanding what you know about them. Being able to surface that allows them to make better choices, be more productive and engaged.”

Along those lines, Goldt says, Workday collaborated with Great Place to Work, a global people-analytics and consulting firm that helps companies produce better business results by focusing on workplace culture, to create a weekly “pulse” survey (shorter and more frequent than traditional surveys) with just two questions for employees focused on workplace culture and feedback. Based on the insights that it receives, Workday people managers are measured on how effectively they enable their teams and the level of employee experience they’re creating for team members and their workmates.

“We have real-time, accurate data upon which we can act, and that really helps our people managers meet employee expectations and needs by having that critical context for decision-making,” she says.

Diversity Metrics with Meaning

Among other things, a single system also can help ensure accurate tracking and measuring of

metrics around diversity, a major step in better understanding a workforce’s needs.

Carin Taylor, chief diversity officer at Workday, says that, as the world of work evolves, the way that Workday thinks about diversity is evolving with it. Five years ago, for example, diversity reports and gender diversity were main focal points.

“While still very important, we’re beginning to see a shift and maturation in the conversation to reflect who we are as a society and how we define diversity,” Taylor says.

As part of this shift, she explains, the type of technology and data needed to answer new questions is also changing. But one thing is clear—diversity leaders need access to real-time, accurate data to make key decisions.

“I’ve previously worked at companies where there was no immediate access to diversity data, and the data had to be pieced together from different sources,” Taylor says. “We would collect the data at a point in time, analyze the data and then get the results—a process that could take weeks or even months. I was constantly worried about data integrity and consistency.”

Now, with a single system for data, Taylor can see where the organization might be lacking diversity, where there might be bias and gain other insights into the state of the workforce. She has data at her fingertips to track progress against diversity goals and view demographic insights—without worrying if the data is accurate or up to date.

“I have the ability to make decisions much more quickly,” she says.

Trusting Data to Drive Engagement

Taylor cites pay equity as an example of how HR and diversity leaders can view the top diversity trends in their organization and take action. Not too long ago, it was very difficult to measure pay differences among areas such as gender and ethnicity without having a system in place to do so. Now, she says, through the use of technology, organizations like Workday can monitor and report on pay equity and make adjustments where needed, ensuring that individuals are paid fairly across the organization.

Clearly, measuring diversity data and taking action are critical to ensuring that employees feel included at the organization. By harnessing the power of data, HR leaders can make key people decisions, keep the workforce engaged and ultimately retain top talent.

To better assess the needs of the organization, Workday uses diversity dashboards and scorecards to view demographic insights into the organization. This allows Taylor to see what the opportunities are and where Workday needs to make changes.

For example, if Taylor looks at gender demographics, she can see that Workday is about 40% women and 60% men. Then, she can break it down further by level. If she sees a drop-off of women at a certain level within a particular function, that indicates that the company needs to think about a better career-development plan for women—such as a sponsorship program—and determine at which point in their careers the organization should introduce those plans.

Taylor's goal is to create diversity programs that are more personalized and targeted to employees' needs. By having diversity data in a single system, she can easily cross-reference this information with other HR data, including pay grade, race/ethnicity/age, region, performance reviews, and learning and development opportunities.

"That gives me a complete picture of the workforce and enables me to make smarter, more data-driven decisions," she says.

Goldt says HR technology has evolved to the point that vast amounts of data are no longer



impossible to navigate—if your strategy deploys a single system approach.

"It really is about putting people at the center and creating that employee experience," she says. "When we think about the experience that people really want to have, it needs to be one that's personal, smart, but also simple."

Most of all, she adds, it boils down to harnessing the power of what you know about an organization's people, which you can do with smart data management and analytics because "you know who they are, you know what they do, you know what they've done and you know where they aspire to go. In many ways, it's journey mapping—you have the starts, the stops, the forks in the road and, all together, that can help you actually support people as they navigate those moments," she says. "That's critical because you want them to stay and grow in your organization. We believe you build great companies through great people. With the large amounts of data that we see out there, a solution based on a single system really is taking advantage of technology to sift through the noise."





'Be Well' is More than a Catchphrase

Employee wellness has become a hot topic, but simply instituting a wellness program isn't enough.

How many of us schedule early-morning or after-dinner meetings, eating up time where we could be exercising, getting extra sleep or spending time with our loved ones before school and work? I know I am guilty of that myself. Sometimes we do not have a choice, but other times we do.

It's up to us as leaders to lean in as models of good health. And then to ensure our managers not only allow—but encourage—healthy habits for themselves and their teams.

Leading by Example

The good news is an increasing number of companies are making strides toward employee wellness. Intuit reimburses employees for meditation and mindfulness classes. Microsoft provides free counseling. Asana offers organic produce from local farms in its dining room, as well as nap rooms. Draper offers employees Zumba and weight-management classes, antidotes to sitting at a desk all day.

At my current company, Accenture, with the help of Arianna Huffington's Thrive Global—which she founded to help organizations foster cultures of wellness after she collapsed from exhaustion—we look at the health and wellness of our workforce through the lens of being “truly human.” This means that we recognize that each person is unique and requires support to nourish his or her heart, mind, body and spirit. From inclusion to mental health, a supportive culture matters.

Thrive Global is helping multiple global companies get it right. JPMorgan Chase Chief Marketing Officer Kristin Lemkau put it well in her *Medium* piece: “When I look back on mistakes I've made ... they all have one thing in common: I was tired.” We all know that feeling, right? Kristin was the first of JPMorgan Chase's 240,000 employees to sign up for Thrive's 28-day challenge. She chose two of four areas—sleep, unplugging from technology, mindfulness and gratitude—and aimed for microsteps that would improve her wellbeing. Imagine if C-suites across the globe began

to model this and support employees in making similar healthy choices.

No matter how it's created, a corporate culture of wellness gives teams the tools they need to incorporate health into the workplace and the permission to take the time when needed.

Putting the Whole in Holistic

I often look for opportunities not just to do good work, but to do *good*—this area presents both.

As HR leaders, we need to ask ourselves if we are truly

advocating for our employees' holistic health. I see so many good intentions take the form of piecemeal programs, but holistic wellness for any workforce requires systems change—an integrated strategy that marries body, mind and spirit.

I wish I could share all the success stories I've seen—from the employee who was supported in taking time off to care for his dying father to call-center workers who collectively lost hundreds of pounds together. And, of course, in each

case, their employer benefited from workers who were able to more fully engage.

Sometimes, it's nice to be reminded we hold the power to create real systems change for our people.

Here's to good work while doing good. Be well.

Eva Sage-Gavin is a former CHRO with more than three decades of experience in Fortune 500 corporations. She currently serves as the senior managing director for Accenture's global talent and organization consulting practice and as a technology board director. Send questions or comments to hreletters@lrp.com.

Talent Management

By Peter Cappelli/Columnist



How We've Gotten Hiring Wrong

I have spent some time this year investigating how hiring is actually working, as opposed to how it is described in textbooks, and it seems

much of what we are doing just doesn't make much sense. Not only doesn't it look like textbook best practices (which are probably out of date), but it doesn't conform to basic principles of logic.

Hiring is now the central task in human resources, with almost \$300 billion spent annually on hiring in the U.S. It is taking even longer now to get through the administrative processes of hiring (mainly because of more interviewing) than in the past it took to fill jobs, and the costs of extending vacancies may be twice the costs of hiring. Those leading today's hiring practices seem to have forgotten things we've known for decades and are embracing tools with no evidence that they work.

Here are three serious problems I see:

1. We don't check whether our practices are giving us good or bad hires. Only about one-third of employers, even large ones, collect data to see whether their hiring practices are producing good employees, so they could not find out even if they tried. Because it is hard to measure quality hires, many employers instead measure costs and time per hire.

Think about that for a minute: It would be like a marketing department telling you how much an advertising campaign costs and how quickly they put it together without telling you whether customers bought anything. It is particularly damning because checking to see if your hiring practices work is also the best—and only—defense against discrimination charges. It also means that it is impossible to get better.

2. We ignore internal talent. Only 28% of talent-acquisition leaders report that internal candidates are an important source for filling vacancies. Virtually all of the 66 million hires in

the U.S. each year come about by back-filling vacancies, largely created by employees—especially those who can't advance internally—leaving. We're in a hiring frenzy, bailing the boat to keep going because there is a hole caused, at least in part, by not filling jobs from within.

3. “Culture fit” is the primary criteria in selection decisions. Yet, we rarely define what our culture is and what a fit looks like, and we make that decision typically based on unstructured interviews conducted by untrained hiring managers. This is a recipe for hiring people “just like me.” At the same time, we fret about diversity and inclusion.

This is where I am puzzled: When I talk to people about these problems, they virtually always say, “Yes, this is crazy.” So, why does it continue? Why is it that we are obsessed with artificial intelligence when we cannot even accomplish the most basic tasks in hiring?

One explanation I've heard is that it is just hard to do things differently, especially on something like assessing what constitutes a good hire. This is a textbook example of making perfect the enemy of good: We will continue to be bad because we can't be perfect. Even a one-question measure—Would you hire this person again?—is better than doing nothing at all.

Another explanation is that line managers are calling the shots. They want to pick candidates they like, new blood from outside and so forth. If that were true, it would be extremely depressing—that even on this most basic task, where there is a body of evidence going back generations, HR has no influence.

As you can tell, I am puzzled, and I'd like to hear what you think.

Peter Cappelli is the George W. Taylor Professor of Management and director of the Center for Human Resources at The Wharton School of the University of Pennsylvania in Philadelphia. Send questions or comments to hreletters@lrp.com.



Is Conversational Tech on Your Radar?

Full disclosure: I probably speak to Amazon's Alexa at home more than just about all the people I know; I interact with Alexa so often these days, it's kind of hard to remember LBA—life before Alexa. And that is the hallmark of any essential technology: Once you adopt it into your workflow, you can't imagine not having that technology available.

There seems to be incredible opportunities for conversational and voice-enabled technologies to make a huge impact in the workplace, which means HR should be prepared. Here are the three main areas where I see these technologies helping HR, employees and their organizations:

Information Access and Retrieval

Most of us would probably agree that easier, faster and simpler access to the basic information we need to remain productive at work would be highly valuable. However, we may need information from multiple systems in any given day, and these typically require us to know how to access and make inquiries of each—all having their own access protocol. Voice-enabled, conversational systems have the potential to remove that complexity, reduce barriers to adoption and make any HR or enterprise information accessible using the simplest interface possible: just by asking for it. It (probably) won't be called Alexa, but soon, most of us will have an HR version of Alexa, putting us just a voice command away from the information we seek. While that is incredibly empowering, it is just the first step.

Process Support

Once you have basic information, you must use it to initiate action. For instance, you may ask your digital HR assistant, "How much PTO do I have left this year?" Developing a simple, voice-enabled assistant to reply with the balance isn't all that complex today. But most of us want to do something with that information, like initiate a request for time off. Modern HR digital assistants using voice-enabled technology support the initiation of that request, either via a voice command ("I would like to request time off next Thursday") or a chat-based interface. Either way, the technology is providing a no-training-required method to

launch and manage a business process.

These tools can even support more complex HR processes, such as promotions, transfers and compensation adjustments. The structures to support these transactions have existed in HR systems for a long time, but modern technology makes them simpler, faster and more accessible to people outside the HR function.

Advanced Digital Assistants

Beyond information retrieval and workflow-completion support, the next step for conversational and voice-

enabled technology is a deeper analysis of data, processes and environments to help managers and employees make better, faster decisions. When the digital assistant "understands" the implications of having a given work location understaffed on a particular day or for a certain shift, it can then proactively "push" recommendations to the manager: "I see you have just approved the time-off request on Wednesday for Jane Doe. You may need to consider calling in temporary staff for that afternoon. Here are three contractors you have worked with in the past who are available.

Shall I contact the top-rated contractor to schedule them?" This example takes simple information retrieval, combined with support and awareness of a standard process, and applies more advanced intelligence to help the manager drive the most optimal business decision.

It may be early days for voice-enabled and conversational HR technology, but this is the kind of innovation that seems likely to drive the next wave of HR tech. We will highlight these and many more innovative solutions at the HR Tech Conference Oct. 1-4 in Las Vegas.

Steve Boese is a co-chair of HRE's HR Technology Conference & Exposition®. Send questions or comments to hreletters@lrp.com.

Emerging Intelligence

By John Sumser/Columnist



How to Trust Digital Workers

There is a rhythm to the year that seems to begin and end with the HR Technology Conference, being held Oct. 1-4 in Las Vegas, considered the industry's town hall. We get together and show each other what we've learned and created over the past 12 months.

Currently, the story is about machine intelligence creeping into every decision we make. Because they have tons of data, enterprise providers are embedding intelligence in every aspect of their suites.

Meanwhile, industry-leading HR departments are quickly deploying teams of data scientists to make sense of all the new information. These early stages of HR as a science involve investigating correlations between every imaginable piece of data for clues to workforce productivity, predictions of employee behavior, selection suggestions and the ways HR drives business results.

In short, algorithms, models, correlations, predictions, recommendations and forecasts are coming toward us in a blaze of potential insight. The key question is whether you can trust what you see. The answer, unsurprisingly, is that nobody can tell at first. Although a machine's output has a ring of authority, you're really dealing with a new worker. As with all junior employees, trust should be earned over time.

With new digital workers, all you really have is the vendor's assurance that its work will be adequate. It's highly unlikely a vendor will be willing to be responsible for mistakes digital tools make. So, you have to cautiously and carefully move from skepticism to trust—the same journey you take with any new employee.

Here are five ways to understand and build trust with your new digital employee:

1. Understand what you're getting:

Deeply review every single algorithm,

model, process automation, prediction or recommendation function before releasing it. Understand the results before you use them. Build a review board that considers ethics, legality, consequences for diversity, cultural implications and business-outcome impacts. Make the review process public and transparent.

2. Measure and test: Measure the output of each action initiated or suggested by the machine employee. Review the measures daily at first. Settle into an oversight rhythm based on the importance and frequency of the function.

3. Anticipate replacement: All digital employees will wear out and need refreshment, so plan for inevitable failure while searching for improvement in the quality of digital performance.

4. Monitor outcomes: At an aggregate level, your digital employees will have a system-level impact. It will show in engagement levels, turnover rates, organizational productivity, communications effectiveness and other organization-level indicators. Monitor these things in that light.

5. Track and record development: Build and maintain a central library that documents the workings of each digital employee, its output, replacement strategies, maintenance actions, training data and re-engineering assistance. Digital employees require job aides and descriptions that are better than those you give your human employees because they are much harder to replace.

The addition of digital workers requires new forms of organizational management. These are the minimum starting points.

John Sumser is the principal analyst at HRExaminer. He researches the impact of data, analytics, AI and associated ethical issues on the workplace. Send questions or comments to hreletters@lrp.com.



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Top Story

How to Respond to a No-Match Letter

For the first time in more than a decade, the Social Security Administration began mailing so-called no-match letters—formally known as Employer Correction Requests—to hundreds of thousands of U.S. companies earlier this year. The letters notify employers they have at least one name and Social Security Number combination submitted on a Form W-2 that does not match the SSA's records. Employers are instructed to register for the agency's Business Services Online and correct the mismatch within 60 days.

The practice dates to 1993, when such letters were issued to both employers and employees on an annual basis, ramping up following the terrorist attacks of Sept. 11, 2001. The SSA stopped sending no-match letters to employers in 2007 after a failed attempt by the Homeland Security Department to issue a regulation governing use of the letters for immigration enforcement. Letters continued to be sent to employees until 2012, when they were halted altogether.

Democrats and immigration-advocacy groups have raised suspicion that the motivation for the letters lies in the Trump administration's determination to ferret out undocumented workers. Although he "wouldn't be surprised if there's a link there," Doug Kauffman, partner at Balch & Bingham LLP, has yet to see any "concrete evidence" the letters are related to Trump's immigration crackdown. Rather, he feels the SSA has revived the practice simply because its ability and resources to identify no-match situations has increased. That said, he cautions that Immigration and Customs Enforcement is unlikely to look favorably upon an employer that has failed to respond to such a letter if an immigration issue arises at a future date.

"ICE might take the position that the employer has not acted in good faith, especially if the impacted individuals turn out not to be authorized to work in the U.S., which could have an impact on the amount of fines," says Kauffman.

While some attorneys tell clients they can "set the letters aside" because they don't identify the affected employees, instead requiring the employer to go online to access that information, Kauffman says, an employer should never ignore a no-match letter. Likewise, they should never assume a mismatch is an indicator of fraud or an immigration violation. Much of the time, it is merely the result of a clerical error or name change due to marriage, divorce or other factors. Therefore, it's imperative the employer not view the situation as just cause to fire the employee.

Kauffman recommends employers begin with a review of their own records to determine if an internal error is to blame. If that doesn't appear to be the issue, they should then reach out to the employee, inform them of the notice and give them the opportunity to remedy the mismatch. If they cannot, the employer then faces a tough decision.

"Ultimately, if you can't get the issue resolved, you've got a decision to make," says Kauffman. "I don't think anything requires you to terminate the employee if they don't get it resolved, but you are taking a risk if you don't."

—Julie Cook Ramirez



What Does the House Vote on the Cadillac Tax Mean for Employers?

The Cadillac tax is on its way to being repealed.

The U.S. House of Representatives voted this summer to scrap the Affordable Care Act's unpopular tax, a major victory for employers, insurers and other industry players who for years have been calling for its elimination. In a wide bipartisan vote, the House approved H.R. 748, the Middle Class Health Benefits Tax Repeal Act of 2019.

The House bill has a companion bill in the Senate, sponsored by Sen. Martin Heinrich (D-N.M.), but a vote in that chamber has not yet been scheduled.

"Employers, employees and the general public are not in favor of this tax, so a permanent elimination of it as an uncertain threat over employer plans is [a good thing]," says Steve Wojcik, vice president of public policy at the National Business Group on Health. "We're hopeful Congress will get it done this year."

The tax, which is among the least popular provisions of the healthcare-reform law, imposes a 40% levy of each employee's health benefits above a certain threshold, adjusted annually for inflation. In 2022, the tax will be triggered when the cost of an employer plan surpasses \$11,200 for an individual and \$30,100 for a family. The cost is calculated based on spending on total health benefits, such as the average cost of the plan, employer contributions to a health- or flexible-spending account and the value of

coverage in certain on-site medical clinics.

The tax was originally created as a way to help fund the ACA, but it has been a recurring pain point for employers, with many calling

for its repeal. It also has had rare bipartisan opposition: Republicans and Democrats have come out in disapproval of the provision, which makes approval of repeal likely, industry experts say.

The Cadillac tax was originally scheduled to take effect in 2018, but it has been delayed by Congress twice; if it isn't voted down by the Senate, it's currently set to be implemented in 2022. The looming uncertainty has been a recurring headache for employers planning for their health plans.

"Getting rid of that uncertainty would reassure the millions of employees who rely upon and value the coverage offered by their employers, as well as the employers, who will be able to plan better," Wojcik says, adding that another pain point is that most employers were expected to eventually hit the tax threshold—even ones that reduced and scaled back benefits—because of a "fundamental flaw in the way the indexing was set up in the legislation."

"It means that, as long as healthcare costs are going up faster than overall inflation, employer plans will still hit the trigger and get taxed eventually," he adds. "The vast majority of plans would hit the tax, including the high-deductible, account-based plans. It's not just traditional plans—all plans will hit this tax."

Roughly one in four employers is expected



to be hit by the tax if it is implemented in 2022. An even larger share (31%) could be affected when workers' voluntary contributions to FSAs are taken into account. The analysis also indicated that the tax would affect a growing share of employers over time, reaching 37% in 2030 without including FSA contributions—and 46% with them.

"Given that most estimates suggest that health costs will continue to increase faster than inflation over time, a growing number of employers will be subject to the tax unless they make changes to their health programs," the KFF says.

Supporters of the tax argue that it would force changes or penalize some existing plans and, therefore, will help curb the growth of health costs. Economists also worry that eliminating the tax would add to the country's deficit.

But industry groups, including the Society for Human Resource Management, the American Benefits Council and the Alliance to Fight the 40—a coalition of hundreds of stakeholders—disagree and have been lobbying for the repeal.

"Healthcare is consistently ranked the most important employee benefit," SHRM leadership says in a statement. "Repealing the Cadillac tax will provide employers the flexibility to design healthcare benefits to meet the needs of their specific workforce."

—Kathryn Mayer

Reinventing PTO Policies for Retention

Paid-time-off programs continue to be a valuable way to attract and retain employees, with a recent sharp increase in providing paid parental leave separate from short-term-disability programs. Despite the obvious benefits for workers, however, only about two-thirds of employees are taking advantage of all the time coming to them.

These are some of the findings in WorldatWork's 2019 PTO/Paid Parental Leave Programs & Practices Survey, with underwriting support from PTO Exchange.

"I don't think it's necessarily surprising that people are

valuing time off more," says Marta Turba, content director for WorldatWork. "But the way that time off is being expanded is noteworthy. There were significant changes in the number of organizations offering those more innovative programs, like parental-leave programs and paid time off to volunteer."

Some 42% of companies now offer separate paid-parental-leave programs, compared to 23% in 2016, when the survey was last conducted. Thirty-five percent of companies reported offering PTO for volunteer activities, compared to under 25% three years ago.

Another surprise was that newly hired employees seem to have more immediate access to time-off benefits than in the past, she says.

"Fifty-two percent of our organizations are allowing immediate use of vacation-time benefits for those who [have been] just hired," Turba



says. "With newer benefits like parental-leave programs, 65% of employers are allowing immediate access."

Another innovation is that one in four employers allows employees to redirect unused paid time off instead of simply losing the benefit. Programs allow them to donate time to colleagues who need time off (20%), redirect the cash value of unused time off to their 401k (2%) or convert the cash value into a donation to a nonprofit that is important to

them (2%). Additionally, 63% of companies have PTO-bank programs that give workers immediate use of vacation, illness or personal time.

Part-time employees are also being included more often in PTO policies. For instance, 77% of companies offer them paid time off (usually on a prorated basis), and 57% offer job-protected parental leave to part-time workers.

"Part-time opportunities may be more abundant and the role that part-time workers have in delivering business value and success is perhaps emphasized more than it has been in the past," Turba notes.

This increase tracks with what Rob Whalen, co-founder and CEO of PTO Exchange, has been seeing. "Paid time off is going to drastically change over the next five to 10 years," he says, as companies cater to flexibility desired not just by full-time employees

but also by those in the gig economy.

Whalen says it's also notable that 37% of employees don't use all their paid time off—and that's an expensive mistake. "Certainly, we all find it surprising that people leave PTO on the books. People are giving that [money] back to the company, and \$62.2 billion is going back to the shareholders."

Finally, the survey also revealed that employers' "use it or lose it" policies encouraged more people to take time off, so that only 19% of employees left time on the table.

"We often hear that employees want work-life balance, but so do employers," Turba notes. "PTO programs are important for promoting workforce resilience, sustainability and long-term retention so people don't burn out."

—Maura C. Ciccarelli

Employees Eager to Learn New Workplace Technologies

As more job tasks become automated, HR professionals are faced with the critical task of retraining employees to

use artificial intelligence, robotics and other advanced tech tools when performing their jobs.

But are workers motivated to upskill? Are they eager to tackle 21st-century jobs and responsibilities?

Many companies are betting on it and offering retraining opportunities. A new report by Clutch, a B2B ratings and reviews firm, supports that thinking. The firm surveyed 510 full-time

U.S. employees this year about their experiences with and attitudes about job development and retraining.

Seventy percent of respondents say they are likely to participate in an employer-provided job-retraining program. Nearly all—93%—believe it's important for their employer to help them build skills needed for their job, while 73% think it's very or somewhat important for employers to help them either transition to a new role or find another job. Another 19% wish their company offered tuition assistance for classes or workshops outside their company.

"Employees are open to retraining," says Marinus van Driel, associate partner in Aon's talent rewards and performance practice. "A lot are looking at their longevity with their employer and saying they do need to reskill and retool themselves as their organization or industry changes."

Consider IBM's New Collar Certificate Program that offers tuition assistance to U.S. workers eager to

learn high-tech skills through vocational coding camps, community college courses or the company's professional certificate

program. It has been so successful that it was expanded to France this year.

Last year, AT&T announced it was spending \$1 billion to retrain half of its workforce on new technologies. This year, Amazon is promoting its plans to spend \$700 million to retrain one-third of its U.S. workforce by 2025, despite worker strikes and protests about inhumane working conditions. Van Driel points to a financial-services company that retrained employees last year. He says 52% participated. Of those, 95% either moved into new, agile roles or committed to doing so.

Still, upskilling may not be beneficial for everyone, particularly small or midsize



employers. He says HR must first analyze the business rationale for retraining versus recruiting. Once the "why" is established, identify your starting point—retrain individuals, teams or the whole organization. HR must match or personalize training to individual employee needs and help workers understand the payoff or what career paths and jobs will become available to them.

"The role of technology cannot be underestimated," says van Driel, adding that many companies are also tapping premium courseware providers like Udemy and Coursera for training content. "This type of thinking is bound to explode."

—Carol Patton

What's New in Employee Benefits?

The Society for Human Resources Management recently released its annual *Employee Benefits Survey*, which highlighted the changing trends in employee benefits over the last year. Among the findings:

- ▶ the biggest increase was to health and wellness benefits, to which 20% of employers added;
- ▶ travel- and housing-related benefits saw the least traction;



- ▶ healthcare and retirement were the most valuable benefits rated by employees; and
- ▶ student-loan repayment saw the biggest jump, with the number of employers offering this perk doubling to 8%.

Industry Groups Praise HSA Expansion for Chronic Conditions

Employees with chronic conditions now will have an easier time using their health-savings accounts to pay for their medication, according to recently released government guidance, marking a growing movement toward modernizing the popular accounts.

The IRS and Treasury Department determined chronically ill patients enrolled in HSA-eligible high-deductible health plans will be able to access coverage for certain services before they spend enough

money out of pocket to meet the high deductible—good news for employers and employees who struggle with the cost of treating chronic conditions, including heart disease, diabetes, asthma and depression. Previously, workers enrolled in the plans had to pay down their deductibles before their insurance covered such treatment.

“Pre-existing, chronic conditions are debilitating for millions of Americans,” says Jim Klein, president of the American Benefits Council, one of the industry groups that had been advocating for the change to HSAs. “These conditions represent an enormous drain on the economy through high health costs and reduced employee productivity. Modernizing

HSAs to address chronic-disease prevention is important to help tackle this problem.”

Research from the Centers for Disease Control and Prevention shows that full-time workers with chronic diseases cost employers \$153 billion in lost productivity each year.

The guidance reclassifies certain medical services as preventive for someone with a chronic condition. Those medical services include beta blockers for heart failure, inhalers for asthma, insulin and glucometers for diabetes, and statins for heart disease.

The change is expected to encourage patients to get care and save employers and insurers money in the process, as chronic conditions often worsen without regular treatment.

“Failure to address these chronic conditions has been demonstrated to lead to consequences—such as amputation, blindness, heart attacks and strokes—that require considerably more extensive medical intervention,” according to the guidance.

The news comes as HSAs are growing. More than 20 million people are now using the accounts, according to America’s Health Insurance Plans.

And this summer, President Trump directed the Treasury Department to find ways to expand the use of HSAs paired with high-deductible health plans to pay for “medical care that helps maintain health status for individuals with chronic conditions.”

—Kathryn Mayer

Here’s Why Talent Retention is a Major Priority for HR

It’s clear from at least one survey that HR professionals are more concerned with retention than talent acquisition.

A recent pulse survey by Next Concept HR Association of its members

(from organizations of all sizes) found that 80% agreed with the following statement: “My organization would run more smoothly and productively if we could find a way to hold on to our best workers.” By way of contrast, only 48% of participants agreed with this statement: “My organization could grow faster if we could only hire more quickly.”

“Talent acquisition has long been a top priority for companies in many growth industries like technology, and in areas like the San Francisco Bay Area,”

says Greg Morton, CEO of NCHRA. Many organizations feel they have to recruit constantly in order to ensure they have a steady supply of talent to handle an increasing volume of work, he says. “But the perpetual search for new talent often leads to a revolving-door effect in which new hires aren’t fully utilized, and existing employees don’t feel truly valued. Interestingly, the HR practitioners who participated in this pulse seemed to be more interested in talent retention than in merely hiring for the sake of rapid growth.”

In aggregate, only 27% of respondents said their organizations are using technology well to better attract and retain top talent. Participants from the

technology industry responded slightly higher, with 32% saying that they are using technology well. Within the healthcare and hospitality industries, 77% said they were open to exploring new technology solutions to better attract and retain top talent, outpacing the aggregate response of 62%.

The NCHRA, which conducted the survey in partnership with online-survey platform Waggl, also posed the open-ended question, “What can

your organization do differently to better attract and retain top talent?” Crowdsourced responses were distilled into a ranked list. Here are the top five responses:

- “Shift the culture towards employee purpose and how it aligns with our business strategy.”
- “Be more proactive, rather than reactive.”
- “Better training and development. They do a great job for new-hire training but it stops there. Looking

at employee retention is an important aspect of the employee lifecycle.”

- “Continue the onboarding process past day one. Invest in smart, talented people and provide training and growth opportunities to create a career trajectory for each employee.”
- “Career/growth opportunities. Improve company culture/perks.”

The NCHRA, one of the largest HR associations in the U.S., changed its name from the Northern California HR Association in 2018 in part to reflect the size and diversity of its members, who hail from all corners of the nation and several foreign countries, including Poland.

—Andrew McIlvaine



How Employee Experience Impacts Your Talent Pipeline

It’s getting a bit redundant to say times are tough in the talent-war trenches. Yet, it continues to be the reality.

A recent report, in fact, warns that employers that expect to attract new top talent while identifying and nurturing potential leaders should continue to keep their eye on that prize—while maintaining a focus on improving the employee experience.

The *2019 Organizational Wellbeing & Talent Insights Report*, from Arthur J. Gallagher & Co.—a global insurance-brokerage, risk-management and consulting-services firm—took a deep dive into compensation, benefits, retirement and employee-communications strategies increasingly associated with high-performing organizations. All told, 32 thought leaders from Gallagher’s employee-benefits consulting and brokerage operation, who average more than 25 years of industry experience, combined to provide analysis for the report.

The bottom line is that today’s talent-management landscape means U.S. employers must be innovative in the compensation and benefits area, while delivering effective leadership and communication. Success in integrating these efforts, driven by a focus on the employee experience, includes an improved workplace culture that strengthens workforce engagement and reduces turnover.

“Record-low unemployment, combined with the different values and priorities of employees entering the

workforce, is forcing a fundamental rethinking of organizational talent management,” says William Ziebell, CEO of Gallagher Employee Benefits Consulting and Brokerage, adding that competing on higher salaries alone can be ineffective and expensive.

“CEOs, CFOs and HR leaders who work together to redesign the entire workplace experience around the generational preferences of today’s workforce will be better able to retain the top talent they attract,” he says.

The report’s advice is for HR execs to approach people management with richer data and better insights. According to the report, the ever-tightening U.S. job market means HR frequently relies on the existing ranks for new leaders. With that, identifying the most qualified candidates to lead the organization in the future requires an evaluation of both quantitative and qualitative measures.

On the qualitative side, it’s critical for HR to assess each prospective new leader’s creativity, curiosity, interpersonal skills and ability to innovate—once considered so-called soft skills, but not in today’s changing business climate, with its shift to a digital workplace.

Finally, the report says, after “rising stars” are identified, HR’s job is to collaborate with finance and line-of-business management to ensure that high-potential performers’ career paths and rewards match their values. When it comes to younger employees, in particular, employers should realize that opportunities to comfortably integrate their personal and professional lives are top priorities, including flexibility and community involvement.

—Tom Starnner

This is the Career Workers Wish They Had Pursued

Would today's U.S. workforce do things differently for their career path if they could go back to their late teens? Apparently so, according to a recent survey. For employers and HR, that might be a clear sign that upskilling an existing workforce is a good idea.

The *Randstad Workmonitor Survey for Q2 2019* reports that, if U.S. employees could time travel back to age 18, 68% would focus on a field of study within STEM (science, technology, engineering or math) instead of the path they actually chose. The survey was conducted online among employees aged 18-65 who work at least 24 hours a week but are not self-employed.

Apparently, with our increasingly digital world, U.S. employees are seeing the value of a STEM education and career path over other tracks. At the same time, 60% believe their employer has trouble finding the right workers for these roles today.

"Employees understand the value of STEM talent today; they see their employers on the hunt for that talent and how in demand STEM skills are in the modern workforce," said Graig Paglieri, group president of Randstad Technologies and Engineering, in a company statement. He added the survey findings don't necessarily mean people in non-STEM roles have career regret or think their jobs will be taken over by automation and robots.

"However, it's clear most people think having at least some formal STEM education continues to be valuable in today's job climate," Paglieri says, adding that, formal education aside, employers who proactively provide upskilling opportunities to their employees will be at a greater advantage long-term than those who don't.

U.S. employees don't seem particularly uneasy about digitalization, though they believe more preparation is needed. For example, 79% feel equipped to deal with digitalization in their job. On the flip side, just 27% expect their job to be automated in the next five to 10 years, making Americans seemingly more optimistic than most of their global counterparts (across 33 countries, 35% of workers feel this way).

A majority of employees (62%) say their employers should invest more in developing digital skills, while 49% say they are investing in themselves by delving into topics like artificial intelligence and machine learning because their current employers don't provide training.

Other employer takeaways from the survey include:

- Job security is still important to many workers today. To that end, Randstad suggests starting an open

dialogue and educating the current workforce on how much the company or team is embracing digitalization.

- Identify at-risk workers in advance and empower them to take on new roles or responsibilities that aren't in danger of becoming obsolete. A lack of career

growth also happens to be one of the top reasons that employees choose to leave, so it's smart to prioritize training and look for upskilling opportunities, according to Randstad.

- With more STEM job opportunities than job seekers, be proactive in pipelining and flexible in hiring requirements for these roles.

Hiring for potential and then investing in workers by training them on a company's specific software and processes can make a major difference.

"Honing STEM talent from within can be a great way to close the skills gap many organizations feel right now," Paglieri said.

—Tom Starnier



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Uncovering the True Value of Sponsorships in the Workplace

Just how important are sponsorships in the workplace?

As it turns out, those who have a sponsor are paid 11.6% more than those who do not, according to new research from PayScale Inc. Perhaps not surprisingly, for men, the “sponsorship premium” is even higher: 12.3% compared to women at 10.2%.

The just-released findings from the report, titled *Sponsors: Valuable Allies that Not Everyone Has*, highlight the unconscious bias that exists in most organizations, where white male leaders sponsor or advocate for “people like themselves”—other white males. “As a result of this human bias, female employees—and particularly female employees of color—are left behind when it comes to compensation,” the report’s authors state.

The new research “shines a light on the fact that white male leaders should actively look for opportunities to advocate for people who don’t look like them,” says PayScale Director Wendy Brown. “Human bias is entrenched in the workplace, and sponsorship programs that don’t address it will result in the continued prevalence of primarily

white male leadership on our nation’s boards and executive teams.”

Additional findings from PayScale’s report:

- The gender of your sponsor matters: Females who have female sponsors make 14.6% less than females who have male sponsors. Males who have female sponsors make 8.7% less than males who have male sponsors.

- Black and Hispanic women are least likely to have sponsors: At least 60% of respondents overall reported having an advocate at work; however, only 55% of black and Hispanic women reported having an advocate. For comparison, 62.5% of white men said they have an advocate in the workplace.

- Women of color who have sponsors of the same race/ethnicity tend to have lower pay than women of color who have a white sponsor. Black women who have black sponsors make 11.3% less than those who have white sponsors. Hispanic women with Hispanic sponsors make 15.5% less than Hispanic women with white sponsors.

“We can’t want better diversity without disrupting the patterns that already exist,” says Amelia Ransom,



senior director of engagement and diversity at Avalara. “Leaders should proactively ask about people they don’t hear much about. Don’t just tell me about the rock stars who already exist, tell me about the ones you’re creating—particularly those who are underrepresented.”

According to the Harvard Law School Forum on Corporate Governance and Financial Regulation Missing Pieces Report, “1,033 board seats were filled by directors new to Fortune 500 boards (i.e., those not present on boards in the 2016 Census). Of those, 80.7% were filled by Caucasian/white directors, 59.6% [of

which were] filled by Caucasian/white men.”

In addition to employers taking action, women can be proactive in seeking out people in positions of influence who may not look like them, but who may be able to make their business-impacting accomplishments more widely known. A separate *Harvard Business Review* report shows that, when minorities advocate for fellow minorities, they are often either dismissed or categorized as “racist” for advocating for people of color who look like them. Black women often choose other black women to act as advocates, but research shows that this approach may not lead to career advancement—a result that, in the technology sector, has caused many women to leave the industry altogether.

“Sponsorship programs can be an important component of landing higher-paying management jobs,” Brown says, “so it’s critical for companies to have a formalized plan to ensure women of color have equal access to sponsors who will advocate for them when decisions are being made about career advancement and pay raises.”

—Michael J. O’Brien

The Power of Word Choice in Job Descriptions



job interviews are: “hard-working” (58% of women and 49% of men), “good at my job” (48% of women and 42% of men) and “confident” (42%

of women and 40% of men), women also prioritize terms that relate to their character, such as “likeable” (38% of women and 29% of men) and “supportive” (39% of women and 32% of men).

- Both men and women think soft skills are their thing: More than half of women (61%) associate the female gender with the concept of “soft skills” and, interestingly, a majority of men (52%) associate soft skills with the male gender. Despite these findings, in practice, women are more likely to actively showcase their soft skills on LinkedIn, and men their hard skills.

- When it comes to benefits, men and women want similar things, but women often prefer to talk about a role in the context of workplace culture: atmosphere, structure and benefits. Positions that promote flexible working (60%), working from home (30%) and additional medical benefits (45%) are most popular among women. However, flexible working is increasingly important for male workers as well (50%, only 10% less than the figure for women).

—Andrew R. McIlvaine

When it comes to writing job descriptions, research has shown that word choice really matters—especially when it comes to connecting with female job candidates. Now, a new report from LinkedIn offers details on the sort of word choices that can dissuade women from applying.

The report, based on surveys of more than 12,000 employees, 3,000 employers and analyses of billions of data points on LinkedIn’s own platform, shows that women are 16% less likely to apply to a job after viewing it than men. Additionally, the word “aggressive” (commonly used to describe sales goals, the workplace or desired attributes) could discourage almost half of women from applying to a job. Currently, over 50,000 job descriptions on LinkedIn include the word “aggressive,” the company says.

Here are some highlights from the report, titled *Language Matters: How Words Impact Men and Women in the Workplace*:

- Men and women characterize themselves differently at work. While the top-three phrases men and women use to describe themselves in

Upcoming Events

Oct. 27–30 The HRSouthwest Conference, Fort Worth Convention Center, Fort Worth, Texas. This conference offers educational sessions on relevant HR topics, including employment law, healthcare, talent management and more. Attendees will have networking opportunities and interaction with the expert lineup of educational speakers. For more information: The HRSouthwest Conference at <https://hrsouthwest.com>.

Oct. 27–29 2019 Strategic HR Forum, Renaissance Boston Waterfront Hotel, Boston. This forum will offer opportunities to engage in forward-thinking discussions and explore strategies companies are using to lead better workplaces. Attendees can develop new frameworks for meaningful and dynamic employee experiences, new approaches to talent acquisition, learning and inclusivity, and more. For more information: HR People + Strategy at <https://www.hrps.org/executive-events/strategic-hr-forum/Pages/default.aspx>.

Nov. 6–8 National Workers’ Compensation and Disability Conference® & Expo, Mandalay Bay, Las Vegas. Thousands of workers’ compensation and disability-management professionals from across the nation come together for this once-a-year event that’s not to be missed! NWDC offers endless opportunities that will propel workers’ comp and disability-management programs forward. With more than 35 sessions spanning six unique program tracks, NWDC will help attendees gain new ideas on how to use workers’ comp programs to engage absent workers, speed return-to-work and much more. For more information: LRP Media Group at www.WCCConference.com.

Nov. 14–15 HR Comply 2019, Renaissance Nashville, Nashville, Tenn. This event is formerly the Advanced Employment Issues Symposium. It is a leading human capital management conference for HR professionals, executives and in-house counsel. The content and expert presenters will help attendees

get ahead of workplace-policy developments with an overview of breaking updates and proven best practices. For more information: BLR at <https://live.blr.com/event/hr-comply>.

Feb. 24–26 Training 2020 Conference & Expo, Disney’s Coronado Springs Resort, Orlando, Fla. This conference is designed to give attendees skill-building content, covering train-the-trainer essentials, behavioral analytics, digital learning, emerging technologies and more. It is co-located with the pre-conference Learning Leaders Summit and the post-conference Innovations in Training field trip event. For more information: Training Magazine at www.trainingconference.com/2020/index.cfm.

March 23–25 2020 People Analytics & Workforce Planning Conference, JW Marriott Turnberry, Aventura, Fla. Attendees will hear how high-performing organizations are creating a competitive advantage with workforce analytics. Learn how to balance just-in-time talent demands with long-term planning, build your workforce planning and analytics function, apply analytics across the talent lifecycle and more. For more information: Human Capital Institute at <https://pawpconference.com>.

April 15–17 Human Resource Executive® Health & Benefits Leadership Conference, ARIA Resort & Casino, Las Vegas. The *Human Resource Executive®* Health & Benefits Leadership Conference is the largest event focused on employee benefits, healthcare and wellness. Designed for both private and public-sector benefits and HR professionals, it is the place to gain innovative strategies, immediate solutions and practical takeaways to craft a solid benefits program that will attract and retain top talent, improve employee wellbeing and engagement, enhance productivity and more. All sessions are created and delivered by senior executives from leading organizations, both large and small, to give you a high-caliber learning experience covering voluntary benefits, healthcare, retirement, work/family, technology and physical, mental and emotional wellness. For more information: LRP Media Group at www.BenefitsConf.com.

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'A Home Here for Everyone'

HR Executive of the Year David Rodriguez has made it his mission to ensure Marriott International employees feel both included and inspired. BY ANDREW R. McILVAINE

At 21 stories, the new headquarters for Marriott International, currently under construction, will be the tallest building in the Washington suburb of Bethesda, Md. The top floor will feature sweeping views of the U.S. Capitol dome and the Washington Monument to the south and, to the northwest, the rolling hills of western Maryland.

At most companies, a prime aerie such as this would be reserved for members of the C-suite. But, in this case, once Marriott moves into the new building (sometime in 2022), the 21st floor will become home to its state-of-the-art employee-learning center.

The symbolism matters deeply, says David Rodriguez, the hospitality company's global chief HR officer and this year's HR Executive of the Year.

"It underscores our belief that the future success of our business is completely dependent on the extent to which we're promoting our associates' wellbeing and that they're inspired," he says.

Marriott, which acquired Starwood Hotels for \$13 billion in 2016, is the largest hospitality company in the world. More than 700,000 employees in 130 countries and territories wear a Marriott name badge. The company's 30 hotel brands include St. Regis, Ritz-Carlton, SpringHill Suites and Courtyard by Marriott.

Yet, even more than its sheer size, Marriott—which started in 1927 as an A&W root beer stand operated by founders J. Willard and Alice Marriott—is known for its stellar reputation as a place to work. The company has made *Fortune's* "100 Best Companies to Work For" list for a record 22 consecutive years. It's also routinely featured on other "best places" lists, including "Best Places to Work for Veterans" (Indeed), "Best Companies for Latinas to Work for in the U.S." (*Latina Style*) and "Leading Disability Employers" (National Organization on Disability), to name a few.

Beginning with its founders, who hired a company doctor in the 1930s to help look after employees as the business expanded, Marriott has long been known as a standout for prioritizing its workers' wellbeing. Rodriguez, who joined Marriott in 1998 and has held his current position since 2006, is widely credited not only with maintaining but enhancing that reputation while making the company ever-more welcoming to people from diverse backgrounds.

Rodriguez's leadership was vital to the success of the Starwood merger, says President and CEO Arne Sorenson.

"[The merger] was the largest influx of associates in company history," he says. "David ... stressed the common characteristics of our cultures rather than obsessing about process differences, which could easily become attributable to culture conflicts."

A Successful Merger

Tall and affable, Rodriguez joked with passing employees during a photoshoot for this story in the sleek lobby of Marriott's current headquarters in North Bethesda.

Rodriguez combines the people-centric mindset of an HR leader with a keen understanding of business strategy, says Robert Simons, the Baker Foundation Professor at Harvard Business School.

"People can easily engage with him," says Simons, who's known Rodriguez for more than 20 years. "But, on the flip side, he's also very strategic. He relates just as easily when dealing with the most senior business leaders at Marriott."

Others note Rodriguez's easy rapport with company leaders.

"This may sound like a cliché, but David's partnership with Arne, the board and other business leaders at Marriott is highly distinctive," says Dean Stamoulis of Russell Reynolds, who's worked closely with Rodriguez on senior-level succession planning and talent development. "His opinion is constantly sought out and valued."

Rodriguez's strategy for successfully integrating the Starwood employees into the larger organization is driven by three principles, he says:

1. Leaders must espouse and live core values.
 2. Core values should be based on fundamental human needs (in order to knit the organization together through common bonds).
 3. Leaders must empower employees to express core values in a personal way to animate the culture. (This not only further brings people together across generations and geographies, it creates a continuous cultural-renewal dynamic.)
- "When we acquired Starwood, most constituencies predicted that, like most large M&A deals, it would immediately have significant cultural issues and would ultimately fail to reach our objectives," he says. "Well, we defied those odds. The reason is, quite frankly, we didn't follow the typical prescriptions that are offered."
- The priority was to build a "shared understanding" with the Starwood employees on things about which everyone agreed: opportunity, community and purpose, says Rodriguez.





David Rodriguez

Category: Organizations with 7,500 or more employees

Title: Chief HR Officer

Company: Marriott International

Key HR Challenges: Successfully integrating the employees of Starwood into Marriott during the largest merger in Marriott's history.

Key HR Accomplishments: Launching new programs and initiatives that have helped Marriott maintain its position as one of the most respected employers in the U.S.

"We really focused on making sure that everyone understood what this company stands for," he says. "And it became clear across both companies and even around the world that ... there's a home here for everyone."

Employees at Starwood's corporate headquarters got a taste of Marriott's culture during their first introduction to its senior leaders, says Rodriguez.

"[Chairman] Bill Marriott and Arne went to the offices and spent hours shaking hands with every single employee," he says. "Someone asked, 'Don't they know there's about to be a huge press conference about the merger?' But to them, *that* was the most important event."

At Marriott, leaders have helped advance a culture that's unique from most other large corporations, says Rodriguez.

"I started my career as a low-level manager at a big financial-services company," he says. "For employees at my level, there was this drab cafeteria where the meals weren't subsidized at all. For mid-level managers, there was a separate cafeteria where the meals were partially subsidized. And, for the top executives, there was a really nice dining room on a top floor with chandeliers, white tablecloths, waiter service and 100% subsidized meals."

At Marriott, by contrast, Bill Marriott is often seen standing in line holding a tray at the employee cafeteria, encouraging others to go before him, says Rodriguez. "He'll get his food and then sit down at a table and talk with employees."

To happen smoothly, the Starwood integration also had to involve getting the 150,000 new employees up to speed on Marriott's hotel-management systems. Ty Breland, Marriott's global talent officer, oversaw an effort to build a digital-learning platform to train employees in more than 100 countries in fewer than 21 weeks.

To save time and to help the employees apply what they learned more quickly to their day-to-day jobs, the team created "micro-learning" courses that include short videos and virtual simulations. The training, which is mobile-friendly, allowed the company to avoid having to hire massive numbers of classroom trainers and pull workers away from their regular jobs to attend training, says Breland.

"There were definitely some bumps in the road and learnings that we had to have," Breland says. "But it really catapulted us onto another plane as we think about learning, moving forward."

Nearly three years after the merger was announced, there's solid evidence that it's succeeding: Recent surveys reveal that engagement levels of the Starwood employees are on par with Marriott's.

"The engagement score for Marriott was significantly higher [than that for Starwood employees] at the start," says Rodriguez. "But when we administered the survey a year later, that gap had been substantially reduced."

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'A Home Here for Everyone'

When it comes to the most valuable takeaways from the merger, Rodriguez (whose educational background includes a doctorate in industrial/organizational psychology from New York University) cites two things: Give people a reason to come together that's based on fundamental human needs, and have your leaders regularly "live and espouse" your culture.

"If you have a bunch of senior leaders sitting in a room together trying to create a culture for the new organization, I think that's a recipe for immediate failure," says Rodriguez. "The culture needs to be owned by the employees. Leaders need to do what they're meant to do, which is to live that culture and give employees clear proof points."

Taking a Stand

Employees need to be proud of the organization they work for and invested in the wellbeing of their customers, says Rodriguez. It's a crucial reason he oversaw an initiative at Marriott to train hotel associates to recognize the potential signs of human trafficking, a global concern, with an estimated 40 million women, men and children victims of modern slavery in 2016 alone, according to the *Global Slavery Index*. Hotels and motels are often used unwittingly by human traffickers as a base of operations.

Marriott shared the training (which was developed in partnership with nonprofit organizations ECPAT-USA and Polaris, which specialize in combatting human trafficking) with other employers in the hospitality industry. The company also had it translated into 16 languages and made available to locations in 130 countries. So far this year, more than 500,000 hotel associates have been trained.

"This is about living our purpose," he says. "And, to the extent that you're serving a noble purpose in society, you're appealing to the highest needs of your employees. And you cannot have an effective organization just focusing on human capital—you also have to be concerned with social capital."

Marriott's TakeCare program also builds on the relationship between the company and its associates, encouraging them to be invested in their own wellbeing and that of others. TakeCare includes fitness events and challenges, financial-wellness tools, emotional health, career-development training and opportunities for community involvement. More than 15,000 employees around the world have volunteered to serve as TakeCare "ambassadors," helping to spread the word about the program and build enthusiasm.

"These days, pretty much everyone feels disconnected and dissatisfied with almost every institution surrounding them—with the exception of their employers," says Rodriguez. "We spend a huge portion of our lives with

Inside Marriott's Recent HR Wins

Under David Rodriguez's leadership, Marriott International has implemented a number of innovative HR-related programs, such as:

Women's Leadership Development Initiative—This effort was designed to develop a strong pipeline of female leaders. Today, women comprise approximately 55% of the company's total workforce and hold some of the most significant leadership positions in the company.

The Emerging Leader Program—More than 1,300 leaders have completed or are currently enrolled in this program. Overall, women have represented 56% of participants and minorities have represented 36%. Since the program's inception in 2014, 60% of participants have been promoted at least once.

Exchanges: A Diverse Supplier Program—Marriott International annually conducts business with more than 4,000 businesses owned by minorities, women, LGBTQ people, disabled individuals and veterans, and it has spent over \$5 billion with diverse suppliers over the past decade.

The Diversity Ownership Initiative—This program introduces the hotel business to successful business owners who are women or people of

color. Today, more than 1,300 hotels are owned by diverse entrepreneurs who have completed the program.

TakeCare Relief Fund—The fund offers need-based financial grants to employees facing certain personal hardships or natural disasters. Following the acquisition of Starwood by Marriott International, Marriott expanded the program and, in 2018, awarded over \$400,000 in grants to employees and provided \$1.7 million in donations.

TakeCare Champions—These are employees who volunteer to lead by example and help inspire colleagues to live healthy lifestyles. The company was able to enlist 13,979 new Champion volunteers during 2018 alone.

Global Challenge—The TakeCare Triathlon, an annual global challenge, was designed to help employees meet their "personal wellbeing goals" over a four-week period by participating in one of three wellbeing tracks: Move, Nourish and Balance. Nearly 30,000 employees from 426 Marriott locations around the globe participated.

our employer. That's why this notion of promoting employee wellbeing is so important—you're literally partners with your employees' life partners."

Unlike most traditional wellness programs, TakeCare is built on taking a holistic approach to help employees feel good about themselves, foster relationships within the company and build a sense of purpose about Marriott's role in society, he says. It includes the TakeCare Relief Fund, which makes need-based financial grants to Marriott employees around the world who've encountered personal hardship or natural disasters. In 2018 alone, the program awarded over \$400,000 in grants and provided \$1.7 million in donations.

"In the service industry, you're only as good as the wellbeing of your people," says Rodriguez.

To that point, last year the American Psychological Association named the company the recipient of its 2018 Organizational Excellence Award for its comprehensive training and development efforts.

Celebrating Different Cultures

Given its status as a global hospitality provider, with properties in 130 countries and territories around the world, "cultural competence" is central to Marriott's business.

Rodriguez greenlighted the company's "Culture Days" immersive initiative, which is designed to help employees experience and appreciate

different business and social protocols, traditions, trends and cuisines.

The initiative isn't simply for altruistic reasons—ensuring that employees respect and understand other cultures is a bottom-line issue, as well. Indian weddings, for example (which typically feature large numbers of guests), have become big business for some of Marriott's properties. More than 3.5 million people from Japan visit the U.S. annually, while Chinese visitors spend an average of \$6,900 on visits to the U.S.

With Culture Days, employees learn the proper way to present and accept business cards with guests from certain regions of Asia (with both hands and a bowed head). They learn about major world holidays, such as Ramadan. The training is often based on actual scenarios that've taken place at Marriott properties and encompasses more than global cultures—employees are also trained on the various sensitivities affecting military or LGBTQ families, or people from urban and rural areas.

"Could you imagine somebody in the U.S. telling somebody in India or Japan, 'This is how you behave, this is your core value?'" Rodriguez says. "Businesses do it all the time. I think it should be the opposite. You state, 'Here's what we stand for,' and let employees express that in a way that's culturally relevant to them. That way, you'll never have to worry about your culture going stale."

On the talent-acquisition front, Rodriguez has been a pioneer in using social media. Marriott was among the first hospitality companies to use a chatbot to connect with candidates.

"For some of our roles, we're competing for the same talent that Amazon and Google are," he says. "My job is to take our great story and make it available to the public."

This includes "Master of the Craft," a series of multimedia events that spotlight the work being done by chefs and mixologists in Marriott's kitchens and bars.

"We're one of the largest purveyors of food and beverages," says Rodriguez. The content highlighted on Master of the Craft and in a series called #DiaryOfTheCraft showcases the company to top talent in the field.

The series has garnered more than 2 million video-content views and over 14 million social impressions.

Rodriguez's reputation resonates well beyond Marriott. He serves as vice chair of the HR Policy Association, where he's worked closely with CEO Emeritus Jeffrey McGuiness.

"I've always been struck by David's innovation," says McGuiness, citing Rodriguez's willingness to embrace social media for recruiting before many other HR leaders were willing to. "Any time I've had an unusual idea or a different take or approach on something, I'd always seek out David because he's always open to some new angle, perspective or approach."

One of the most important things other HR leaders can learn from Rodriguez is to not allow yourself to be boxed in by conventional thinking, says McGuiness.

"Don't let people in your organization or consultants tell you that there's only one certain course of action for a particular situation. ... David looks at everything from a fresh angle and is always willing to step outside the lane to try and improve the HR profession," he says.

Simons, who's known Rodriguez for more than 20 years, will feature him as part of a 25-hour course he's putting together for Harvard Business School Online on strategy execution, which will include interviews with prominent business leaders.

"I couldn't think of anyone better than David," he says. Simons spent three hours interviewing Rodriguez about "what it means to be a leader in a global, fast-moving business." Portions of the interview will be interspersed into the online course, which is aimed at mid-level managers seeking to move up in their careers—a perfect match for Rodriguez, he says.

"What strikes me about David," Simons says, "is that he's always thinking of others and how he can help them grow."

Send questions or comments about this story to hreletters@lrp.com.

A Common Vision

Many organizations use freelancers as a part of their business. At Upwork, where the business is freelancers, Zoë Harte is making sure everyone is on the same page. BY MICHAEL J. O'BRIEN

When Zoë Harte was named HR leader at the newly created company born of a merger between global freelancing-platform competitors Elance and oDesk, the organization was about to face a triple threat of transition: a rebranding, a new CEO and an initial public offering.

With a widely distributed workforce comprised of over 450 full-time employees and over 1,000 freelancers, Harte, as senior vice president of HR and talent innovation, had to confront the challenge of sustaining a corporate culture while keeping critical talent in-house and engaged during the transition and beyond.

Six months after going public in October 2018, however, the company's engagement and retention figures exceeded previous levels, with engagement nearly 10 points higher than the industry average, and employee tenure roughly double that of its competitors.

One of the major driving factors of that success—which helped earn Harte a spot on this year's HR Honor Roll—has been her commitment to fostering a corporate culture that empowers workers to bring their “whole selves” to work, with a strong focus on diversity, belonging and inclusion.

“Zoe's role is incredibly unique,” says Stephane Kasriel, CEO of Upwork. “She architected a culture of trust, transparency and continuous improvement and has been able to retain the culture despite the company's massive growth and maturation from scrappy start-up to large public company.”

Streamlining Talent Innovation

Upwork's mission is to create economic opportunities so people have better lives, Harte says, “and, though we sell that, we also live that internally.” To that end, each of its departments uses Upwork freelancers—but, previously, each managed its own siloed processes differently. With nearly 1,500 full-time employees and freelancers working for the company at any time, it became clear to Harte there was room for improvement.

“It was somewhat efficient,” Harte says of the old process, “but certainly inconsistent about who had access to what parts of data sets and how people were being communicated with and how we were thinking about compensation.”

Harte and her team set out to centralize the function and build a homegrown solution to quickly access, scale, evaluate and engage freelance talent. Christened the Talent Innovation Program, TIP team members ensure a freelancer's onboarding goes smoothly, that he or she has access to the right systems and is integrated into internal communications, “and that they understand how the work they do connects to our mission,” Harte says.

HR incubated the program into maturity, and it has since expanded and moved under operations.

“It's become a great way to connect to a diversity of thought and experience and remain fully engaged in why we do what we do,” Harte says, “and how we are democratizing opportunity through the work we do.”

Expanding HR's Impact

Breaking out of a siloed mentality is something Harte has experience with, starting with her tenure at Yahoo!, when she left the senior HR business partner role to lead international customer support in Dublin and oversee a 300-person organization across 20 countries.

Since that experience, Harte's made it a part of her mission to “reinvent the corporate ladder”—a mode of thought she calls old-fashioned and limiting—by mandating that her own HR team gets that same sort of exposure outside of HR.

“People do their very best work when they are engaged, inspired and passionate about what they are delivering for the business and the impact they can make,” she says. That may not necessarily mean a linear succession of two-year stints followed by a promotion to bigger role in the same department.

“We think about it more as: Are you learning? Are you challenged? Are you motivated?” she says, adding that internal transfers and job rotations ensure workers get the exposure they need to succeed.

Last year, for example, a senior director on Harte's HR team transferred to work as a product manager. While it was “two levels down” from her previous post, it was also a “huge opportunity” for the team member to share everything she had learned working on Upwork's compliance-product project.

“They're selling it to businesses,” Harte says, “and she understands exactly how that works and how it could be better. So, when she's working with engineers and sales leaders, she's helping them because she understands the HR piece of it.”

“Belonging and Connection”

Among the ways Harte has worked to maintain a sense of community at UpWork is with employee resource groups, including new ones for LGBTQ, African-American and Latino workers, as well as one for workers with families. The groups do more than garner increases in engagement scores, she says, adding that Upwork already enjoys higher retention and job-tenure rates than the industry average.



Zoë Harte

Category: Organizations with fewer than 7,500 employees

Title: Senior vice president of HR and talent innovation

Company: Upwork

Key HR Challenges: Sustaining Upwork's corporate culture during its transition to a publicly traded company while maintaining employee engagement and retention metrics.

Key HR Accomplishments: Employee engagement is nearly 10 points above the industry average, and employee tenure is double that of competitors.

“That sense of belonging and connection we have here,” she says, “is something you have to consciously prioritize as an organization.” That is done, she says, by connecting people who are similarly situated in other life areas to “talk about what's going great for them at Upwork,” as well as opportunities for improvement.

“I don't pretend to know what it feels like to be a single dad or an African-American sales rep at Upwork,” she says, “but I care a heck of a lot about it, and I want that community to feel engaged and supported.”

The groups are run by employees themselves, not HR, she says. “We don't drive the process. We remove roadblocks and get funding.”

For example, as a result of the ERG partnership, the company recently increased and updated its parental-leave policy to make it the same for birthing parents and partners. Now, both men and women can take leave all at once or over time during the first year, and it's the same for adoption and fertility support.

It's exactly that sort of result that drives Upwork's success, says Upwork's CEO.

“Zoë always brings value to the table,” Kasriel says, “and the initiatives she's driven have resulted in a measurable impact on Upwork's bottom line, as well as among the clients and freelancers we support.”

Strategic Growth

Angela Lalor's focus, first at 3M and now at Danaher Corp., built on each company's strengths while expanding HR's strategic business focus and stoking employee engagement. BY MAURA C. CICCARELLI

Over her three decades in HR, evolution has been the name of the game for Danaher Corp. Senior Vice President of Human Resources Angela Lalor.

It started when Lalor realized, as a pre-med student, that working in a hospital setting just wasn't for her. Instead, she dove into studying industrial relations for a master's degree. She then joined 3M's HR operations, beginning a 22-year career that followed her own preferences for interesting and challenging roles, with guidance along the way by, as she calls them, "some fantastic bosses and mentors." She also acquired extensive change-leadership experience in lean and earned her Six Sigma Master Black Belt, which prepared her for her six-year stint in the C-suite as senior vice president of HR for 3M and, subsequently, at Danaher for the last seven years.

Today, she's leading 860 Danaher HR professionals around the world. The global science and technology innovations company has 66,500 employees, more than \$18 billion in revenue worldwide and some 20 operating companies that focus on diagnostics, life sciences, dental care, and environmental and applied solutions.

Lalor's achievements so far have centered on re-engineering the HR function as a strategic business partner to build the best workplace and develop the most effective people leaders.

Boosting Associate Engagement

About six years ago, the organization took a hard look at opportunities for people improvement, says Lalor, who reports to the CEO and interacts directly with Danaher's board of directors. "We re-engineered our whole engagement-survey process and got much more scientific with it," she says.

The leadership team decided to track Danaher's associate-engagement numbers against top-quartile companies—which matched how they measured their business metrics as well. Lalor says it took about four years to hit the market median in all measures; in the last two years, many measures have moved into the top-quartile.

To get there, Lalor and her team built an arsenal of tools and programs to help the operating company presidents and HR leaders identify key opportunities, establish action plans and drive improvement results.

"Our goal, which we talked about openly with associates, was to shift our culture from a focus around just performance, metrics and [business] results to a culture that was focused around performance and people metrics, [and] meeting results and recognition," Lalor explains.

"We feel like we're not done," she adds, saying the company has expanded the focus to drive improvement around diversity and inclusion, with equal emphasis

on both reflecting the diversity of Danaher's global markets and "ensuring that the environment is very enabling and supportive of our associates to bring their authentic selves to work and thrive."

Danaher President and CEO Thomas P. Joyce Jr. confirmed Lalor's role in the process in a letter of recommendation: "Angie joined Danaher with a vision of building a world-class human resources organization—one that would help us attract, develop and engage the employees we need to achieve our ambitious business goals," he wrote. "Angie embodies a mindset of continuous improvement. She is always looking for ways to improve our HR activities."

Developing the Best Leaders

A second HR focus at Danaher has been building a strong leadership pipeline, which played a key role in improving employee engagement.

"We've probably done over 50 acquisitions since I've been here. All of that puts pretty extreme pressure on us to ensure that we've got a robust [group] of emerging and high-potential leaders to support that formula," Lalor says. "We've made some pretty meaningful improvement in our ability to build out that bench through a lot of new and expanded talent-planning tools, talent-assessment tools and leadership programs."

Another change was bringing all talent acquisition in house. "I think, as a result, our talent funnels by every measure have improved meaningfully," Lalor says.

One of Danaher's eight core value drivers is the internal fill rate for senior leader roles: "That has been on a steady rise over the last five years and today it's at an all-time high," she notes. "Associated with that is taking that same focus around CEO succession. I've had the opportunity to work with five excellent CEOs across [3M and Danaher], and we've had really good success in planning for and executing on CEO development and succession."

Lalor adds that supporting effective transitions has been beneficial for leadership teams, the board, shareholders and associates. "That's probably one of the things I'll be most proud of," she says.

Putting Business First

Throughout her career, Lalor notes, she's noticed an evolving need for HR leaders to have a very high level of business and financial acumen. To that end, Danaher regularly seeks out MBAs to fill HR roles, she adds.



Angela Lalor

Category: Organizations with more than 7,500 employees

Title: Senior Vice President, Human Resources

Company: Danaher Corp.

Key HR Challenges: As a high-growth company that routinely acquires and integrates new businesses under the Danaher umbrella, it was critical to re-engineer the HR function to become a strategic business partner for leadership, talent and organizational capability while maintaining its strong financial performance.

Key HR Accomplishments: Lalor, in collaboration with the Danaher leadership team and the HR operation, mapped and implemented a long-term HR strategy to build an effective HR organization; created and engaged the workforce by building a culture of "AND" throughout the organization; prepared ready-now diverse talent; and created an innovation ecosystem based on lean and other continuous-improvement processes.

Each business has unique goals and strategies, and HR leaders should help define what will be a "needle mover" to make those goals a reality, she says.

"You have to prioritize the tactics around that and, most importantly, focus on just really strong execution. I would much rather drive three things really well and get them really well integrated into the business and drive impact on those than try to have textbook best practices on everything. Because, quite often, when you're doing that, you're really not having an impact.

"And, to me," she adds, "if you can do that for your business, that's the best thing you can do for your individual career as well."

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A Healthy Human Connection

Ruth Stricklen Pullins, CHRO at Truman Medical Centers, has focused on putting people first in all her HR innovations. BY CAROL PATTON

Ruth Stricklen Pullins, CHRO at Truman Medical Centers in Kansas City, Mo., envisions her HR role as a differentiator, someone who breaks ground by introducing different or creative workplace ideas, mainly surrounding employee benefits.

While in her current position for nearly four years, she has introduced a series of benefits that serve as effective recruitment and retention tools, as well as morale and engagement boosters, for TMC's 4,500 employees. The organization supports two acute-care academic hospitals, a behavioral-health program, a long-term-care facility and multiple primary-care practices.

Under her guidance, HR introduced TruRenewal in 2017, a paid sabbatical program aimed at the organization's approximately 150 directors and executives. Once every five years, they can take up to eight weeks off by combining PTO—between two and four weeks—with up to four weeks contributed by TMC.

Although there are no restrictions on how participants spend their time, they must complete a pre- and post-assessment survey about their stress levels, for example, or the rationale for taking a sabbatical. According to post-assessment surveys, there's been a 100% improvement in retention, morale and identification of leaders primed for succession planning.

So far, 15% of leaders (directors and above) have taken advantage of the program, which, she says, provides senior leaders with a brief glimpse into how those next in line perform. Stricklen Pullins believes the sabbatical program has been "one huge win" for the organization's safety-net hospitals, which treat all populations, regardless of their ability to pay.

The program takes employee engagement to the next level, adds Charlie Shields, CEO of TMC.

"I thought I knew what HR was supposed to look like, what the CHRO was supposed to do," he says. "Ruth has redefined my way of thinking on that and did things that I didn't even know were possible within the realm of HR."

Pure Imagination

In 2016, Stricklen Pullins introduced an Executive Fellowship program. Over a two-year span, employees gain exposure to company executives and are assigned high-level projects. Although they might not immediately receive a promotion when they complete the program, due to low executive turnover, they can still demonstrate their knowledge and skill and move into higher roles when opportunities exist.

Over the past two years, Shields, Stricklen Pullins and other leaders have engaged in employee rounding on holidays and, once a quarter, at night. They predominantly visit nurses on patient floors. They bring treats and play music while engaging with staff, asking them about their jobs, the workplace and challenges.

In a similar fashion, HR staff conducts weekly rounds dubbed "HR Happy Hour" and uses a one-

on-one survey tool to increase HR's visibility and connection with employees at all levels and during all shifts to identify trends and perceptions. They've met individually with close to 500 employees, sometimes at 4 a.m., and had more than 100 formal survey conversations.

"You don't always think of HR as particularly being on the cutting edge of innovation," says Shields. "Ruth has brought a new level of thought as to how we do HR and what it means."

Taking Care of Business

Given the diverse demographics of the communities TMC serves, Stricklen Pullins added a diversity and inclusion officer to the HR team in 2016 and developed a robust diversity and inclusion strategy that generates diversity awareness within the hospital system and community. As part of that strategy, they both speak at community events and work with diverse nursing organizations. In 2017, TMC was recognized by DiversityInc as one of the top 12 hospitals and health systems in the nation for performance in diversity management. The organization was also designated by Human Rights Campaign as a *Healthcare Equality Index 2018* LGBTQ Healthcare Equality Leader.

Stricklen Pullins' list of accomplishments continues: She successfully negotiated contracts for three different bargaining units. Stricklen Pullins and three other HR professionals became certified coaches as part of HR's effort to build a coaching culture and help leaders develop their strengths. Between 2017 and 2018, the organization reported a 12.5% increase in employee promotions.

At the same time, HR staff began rotating through other HR divisions for cross-learning opportunities. A mentor program was introduced, along with another that matches new hires with employees who would serve as a resource or role model. Stricklen Pullins also partnered with clinical and physician leadership to introduce the Just Culture philosophy, which uses an algorithm to help design safe hospital systems that anticipate human errors, capture them before they affect patients and reduce at-risk employee behaviors.

Likewise, doctors employed by University Health Physicians group worked at TMC's teaching hospital as part of a dual initiative, in which the two groups combined to enhance the potential for recruiting, create greater alignment and optimize revenue. HR played a critical role throughout the process by managing communication, aligning physician compensation and benefits, and revising the organizational structure.



Ruth Stricklen Pullins

Category: Organizations with fewer than 7,500 employees

Title: Chief Human Resources Officer

Company: Truman Medical Centers

Key HR Challenges: Recruiting and retaining nurses for the organization, which typically has 90 nursing vacancies at any given time. Since the Kansas City region supports about 17 hospitals, there's great competition for nurses at all levels, specifically experienced nurses and those trained in surgical nursing or OB/GYN.

Key HR Accomplishments: In the past, the organization's employee turnover rate was in the 20% range. Stricklen Pullins introduced a variety of creative employee benefits like sabbaticals and rounding where senior leaders visit staff—mostly nurses—working at night or on holidays. Since then, voluntary turnover dropped by 4%. Based on responses from an engagement survey conducted in April, employees also increased the ranking of the organization's HR programs from 31% below the national average to 9% above it.

In her next gig, Stricklen Pullins hopes to build a national think tank or innovation group with like-minded individuals, from interns to leaders.

"That's always what I lead with—putting people first," says Stricklen Pullins, adding that TMC's HR department published a book in July 2019 that highlights employees' reasons for choosing a healthcare career. "[The employees are] the common denominator. Understanding that excites me and helps me want to help people where they are—in that hour or where they want to go long-term."

The 2019 Top HR Products offer innovative solutions for the challenges facing HR leaders.

BY HRE EDITORIAL STAFF

Moving HR Forward

Welcome, once again, to *Human Resource Executive*®'s Top HR Products contest. Our annual awards spotlight 10 of the most innovative new solutions on the market that are helping business leaders meet the ever-evolving HR needs of their organizations.

From speeding time-to-hire in the tight labor market to supporting enhanced employee engagement to deepening corporate commitment to diversity and inclusion, this year's winners offer forward-thinking approaches to solving today's most pressing HR challenges. Talent-acquisition tools are again well-represented, as are a number of solutions that incorporate artificial intelligence and many that are designed with a mobile-first approach.

We relied on a combination of staff reviews and comments from outside experts and analysts to narrow the list from the many entries we received to the 10 winners. Special thanks go to the following experts for sharing their insights on the 2019 entries: Gerry Crispin, founder of CareerXroads; Holger Mueller, vice president and principal analyst for Constellation Research; and Brian Sommer, president of TechVentive Inc.

As always, we encourage you to perform your own due diligence before making any investments.

* * * * *

Talroo Insights™ dashboard

Talroo
talroo.com

What It Is: This web-based product monitors millions of job searches each day from thousands of job boards and websites in nine vertical markets, which include retail, healthcare, customer service and transportation. Four dashboard reports—account summary, campaign summary, job summary and competitive summary—provide valuable information for recruiters and hiring managers. For example, they show how many candidates have clicked on ads and identify traffic trends, such as the day and time people are interacting with each ad. The dashboard also reveals the geographic location of candidates, the average clicks for desktop or mobile devices,

and the lowest- and highest-volume job titles, which could uncover ads that need more exposure.

Why We Like It: Among the dashboard's best features is its ability to help recruiters compare the success of their job ads to similar ones posted by competitors. Consider several competing hospitals that each post a job ad for a nurse manager.



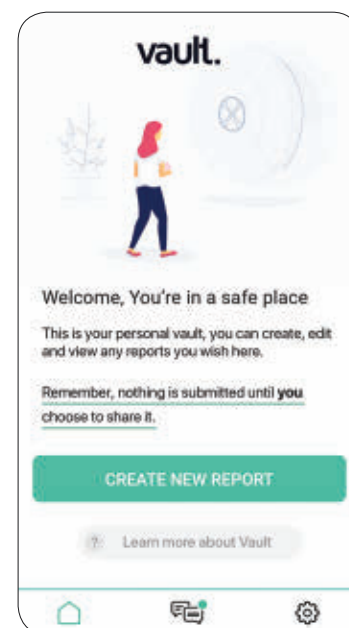
The dashboard identifies which ad is most popular based on the number of clicks, which can give recruiters insight into why their job ad is stronger or weaker than others. For instance, one ad may feature a different title or use specific words or phrases, while another mentions desired benefits like flexible scheduling. This information can help HR create a stronger ad that attracts top talent. The dashboard also provides a list of the top 25 performing companies for specific jobs in local areas.

Vault

Vault Platform
vaultplatform.com

What It Is: This phone app typically targets employers with more than 1,000 employees. It helps workers record, report and retrieve incidents related to misconduct in the workplace, ranging from bullying and fraud to sexual harassment. After logging on, employees identify their complaint and answer a series of questions to create a detailed record of the event. They provide the date, time and place of the incident; a description; details about who was involved; its impact on them; and if they told anyone about it. They can also upload evidence, such as emails. Employees can submit the complaint anonymously, directly to HR or as "Go Together," where the complaint sits locally on the employee's phone until another employee submits a complaint about the same person. Once two complaints are received, the system then submits both to HR. Employees are able to check on the status and outcome of their complaint. Managers also have access to a dashboard that reveals the types of complaints submitted by their staff and the HR professional handling them.

Why We Like It: The system analyzes data to help HR identify hot spots. For instance, maybe reports about bullying are coming from just one office in San Francisco or perhaps more sexual-harassment reports are collectively recorded in June and July than during the rest of the year. These data can help HR identify what's triggering such problems and develop or tailor training programs accordingly. HR can also add notes during each step of the complaint process, while the system maintains a full audit trail of HR's actions.



Technologies of Tomorrow



The technologies powering HR success are expanding and evolving seemingly every day—presenting an ongoing challenge for HR leaders looking to stay on the leading edge. To do that, they need to understand what trends and solutions are coming down the pike so that they invest their energy, money and people power in the right areas.

To that end, in this special edition of Executive Q&A, we sat down with thought leaders in the HR-technology sphere to find out what's on the horizon. They share their insight into the problem areas—and products to address them—HR leaders will want to focus on, and best practices for doing so that will maximize the investment. As you read on, we hope you glean valuable takeaways to make your HR function as proactive and productive as possible.

Q&A

ON HR TECHNOLOGY

**Linda Rafferty, senior vice president,
health solutions, Aon**



Q: Where should HR leaders focus their HR-technology investment in the next 12 to 24 months?

A: Focusing on digital benefits-administration automation at your organization is a potential key to success and can also provide peace of mind. Digital benefits administration can eliminate paper documentation and make enrollment materials searchable and easy to access. This significantly reduces the likelihood of errors or lost documentation and supports federal compliance requirements on benefit-retention policies.

Looking beyond benefits administration, digital technology also allows you to stay on top of legislative changes related to benefits and healthcare. For example, many states have updates to their family-and-medical-leave laws on the horizon, and leave-management-administration tools can help manage those changes. This makes compliance less difficult and frees up your time for more substantial work.

Automating benefits administration gives you more control, making that portion of HR easier to handle. Providing digital benefits administration encourages employees to understand their benefits before using the programs and allows for a greater return on investment.

Q: What emerging technologies are likely to have the greatest impact on HR effectiveness and business performance?

A: App-based wellness solutions can drive down costs and significantly streamline the administration process, for both you and your employees. Employees can have access to digital insurance cards, claims-utilization and cost-transparency tools right on their phones. Tapping into Fitbit or other wearable device technologies can also help administrators implement medical-compliance and wellbeing solutions.

Telehealth is also a complementary tool that makes healthcare more

accessible for your employees. Telehealth allows employees to “meet” with their doctor from the office so they miss less work, which can ultimately help reduce their premiums. Telehealth also allows employees to pick up routine prescriptions without a visit to the doctor’s office. The on-demand nature of telehealth makes it extremely cost-effective.

Q: How can HR departments ensure smooth and successful implementation and execution of new technologies?

A: Employers should always allow as much time as possible to implement new HR technologies. An extended implementation period allows you to pinpoint and address any small problems before they become larger ones. Additional implementation time should be allotted to evaluate work-around solutions you may want to adopt, and it also allows you to consider process changes within your organization that may deliver efficiency gains, potentially via automation.

Having a plan is key to effective implementation, and that plan should include change management. Conduct a trial run to assess potential pain points for your whole team, and be sure to maintain effective communication, which should be part of any good implementation plan. Also, be sure to give yourself enough time to plan your communication and rollout strategies. And remember that engagement is key—try leveraging mobile communication or push notifications to increase engagement from your employees.

The healthcare industry has capitalized on our society’s need for on-demand access to information and has brought a variety of new solutions to employees. In partnership with healthcare consultants, HR managers need to evaluate how to best utilize the variety of on-demand and mobile options to meet the unique needs of their population. If implemented correctly, businesses will not only realize greater efficiency and reduced administrative burdens, but more engaged employees.

To learn more, visit aon.com/healthinnovation

Q&A

ON HR TECHNOLOGY



Craig Rubino,
vice president, E*TRADE
Corporate Services



Q: Where should HR leaders be focusing their HR-technology investment in the next 12 to 24 months?

A: There's little doubt that HR leaders need advanced technology to remain competitive in an increasingly complex field. But to take advantage of technology's vast potential, we believe HR leaders should adopt advanced systems that help synchronize a company's various benefit plans.

The days of using flat files and batch processing to coordinate systems will soon be a thing of the past. Increasingly, benefit programs have evolved into an ecosystem of networks, processes and systems—all of which need to interact.

We believe one of the most efficient ways to synchronize benefit plans is to move toward technology that can enable data to move freely and near real time. By developing systems that pass data rapidly and centralize information, HR leaders can more easily access and analyze data without the need for disparate platforms that don't talk to each other. And today, there are some exciting new technologies in development that take data management to the next level.

Q: What emerging technologies are likely to have the greatest impact on HR effectiveness and business performance?

A: We believe there are three technologies that will have a

significant impact on HR effectiveness and business performance:

1. Application programming interfaces (APIs)
2. Artificial intelligence
3. Business analytics

It's critical that these technologies complement each other. When implemented correctly, this three-pronged approach can potentially result in significant operational and financial benefits.

APIs are software intermediaries that allow different applications to communicate with each other. In the world of HR, APIs allow multiple benefit programs to communicate in near real time, and one system can serve as a single source that exchanges information with other systems. Add artificial intelligence to the process, and systems can execute repeated behaviors that once required significant amounts of time and resources to complete.

But how do you know if these technologies are providing the expected results? That's where business analytics comes into play. Using advanced business analytics, organizations can mine data that allows HR leaders to evaluate and report the outcomes of their benefit programs.

Q: How can HR departments ensure a smooth and successful implementation and execution of new HR technologies?

A: The traditional composition of HR teams is rapidly changing amid the

shift toward technology. According to a KPMG study, about two-thirds of HR executives agree that HR has undergone or is undergoing a digital transformation. But, only 40% of HR leaders say they have a digital workplan in place at the enterprise or HR level.

Part of the issue is setting goals. HR organizations must first understand what they hope to accomplish with technology, identify a solution, and then, finally, follow through with a long-term commitment. That's easier said than done.

To successfully implement new HR technology, it's critical that HR teams first gain buy-in from executive leadership and identify a project lead who can own the project from start to finish. To assist with this, many companies will undergo a cost-benefit analysis to demonstrate the return on investment. In many cases, the benefits can amount to thousands or even hundreds of thousands of dollars.

Companies may also consider embedding technology professionals within the larger HR organization. By integrating technology resources into the HR team, firms can accelerate technology-deployment strategies and improve the chances of their organizations' success.

Ultimately, it's incumbent on HR organizations to take a holistic approach that brings technology systems together in a manner that boosts productivity, reduces costs and enhances the employee experience.

*Craig Rubino is a vice president at E*TRADE Financial Corporate Services, Inc. (E*TRADE). This commentary contains current opinions from E*TRADE Financial Corporation and its affiliates, which are subject to change without notice. E*TRADE is not affiliated with Human Resource Executive®, and all commentary is owned solely by E*TRADE.*

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Q&A

ON HR TECHNOLOGY



Gaurav Kataria,
vice president of product,
BetterUp



Q: Where should HR leaders be focusing their HR-technology investment in the next 12 to 24 months?

A: Companies around the world are feeling an acute need to develop and retain their talent. In particular, in the U.S., with the unemployment rate at a 50-year low, it is becoming more critical than ever to develop and retain top talent. Unfortunately, the one-size-fits-all approach that most LMS and coaching solutions offer is not enough to meet the needs of today's top talent, who are looking for highly tailored and personalized learning experiences. The good news is that, with the recent advancements in AI, it is now possible to design and implement learning solutions that are customized for each individual. Therefore, HR leaders need to invest in technology platforms that can truly develop talent by providing them with highly personalized learning resources and coaching.

Q: What emerging technologies are likely to have the greatest impact on HR effectiveness and business performance?

A: Historically, it wasn't possible to build truly personalized learning platforms. Therefore, it was difficult for HR teams to drive direct business performance. Now, with the power of AI, companies have the ability to implement learning and coaching solutions that are tailor-made for each individual. HR teams can now meaningfully impact business performance and develop the next generation of leaders by leveraging customized learning and development solutions. A comprehensive AI-driven learning and development platform can become the catalyst for driving employee development and engagement, and create long-term business value. L&D teams can now leverage AI-driven platforms that are integrated with their HCM systems and provide personalized learning and

coaching to their entire global population at scale.

Q: How can HR departments ensure a smooth and successful implementation and execution of new HR technologies?

A: A comprehensive AI-driven learning and development platform can work in conjunction with the HCM suite to identify and develop critical talent with highly personalized training and coaching. The first step in the implementation process is to identify key talent gaps by using rigorous assessments. The next step is to design scientific, evidence-based solutions to develop the most critical skills. The final step is to put in place systematic reporting and analytics to track progress and test new interventions. This whole process requires a strong partnership among HR business partners, L&D program managers, HRIS teams, line-of-business leaders and client-success partners from the technology-platform vendor.

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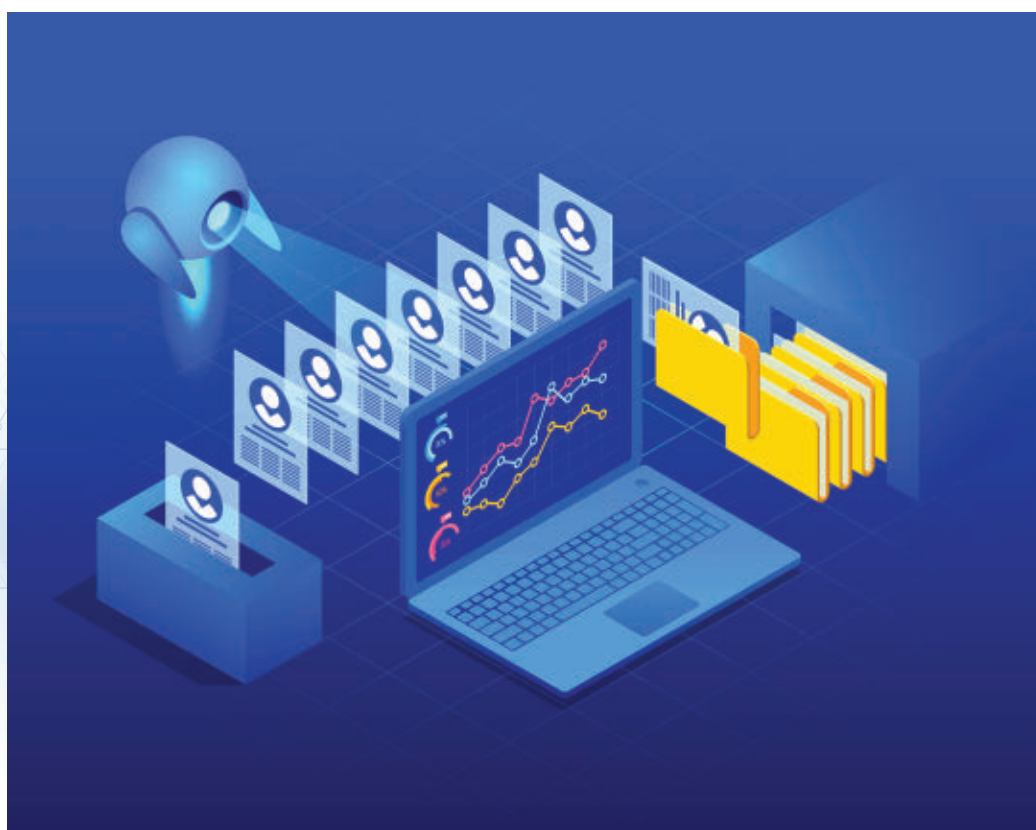


Q&A

ON HR TECHNOLOGY



Mike Pauletich,
vice president of global
alliances & partnerships,
Mya Systems



Q: Where should HR leaders be focusing their HR-technology investment in the next 12 to 24 months?

A: The pace of change in HR technology has reached a fevered pitch, which creates both opportunity ... and confusion. With hundreds of start-ups vying for scarce funds, it is easy to get overwhelmed in your efforts to transform your talent organization. Recruiters for most large enterprise employers are tasked with using an average of 10 HR-technology solutions on top of their core ATS technology. Many of those have poor integrations with the ATS and don't work well with each other. Needless to say, recruiters use only a fraction of what has been purchased. For that reason, I recommend investing in technologies that not only will have both an immediate and long-term impact on the talent function, but also integrate seamlessly with your workflow and core technology investment—your ATS. A

good investment shouldn't have a steep adoption curve—it should just work. Artificial intelligence, for example, is delivering amazing ROI by automating labor-intensive recruiting functions, dramatically reducing the cost and time to fill openings, improving recruiter efficiency and optimizing the candidate experience. When seamlessly integrated into the ATS, the technology works without relying on recruiter adoption—it just fills their calendars with pre-qualified candidates to interview!

Q: What emerging technologies are likely to have the greatest impact on HR effectiveness and business performance?

A: Two emerging technologies are leading the pack—AI, in all of its various forms, and blockchain. With the massive amount of data available and collected, artificial intelligence—or, more specifically, the use of machine learning and natural-language processing and

understanding models—is able to deliver on the promise of HR transformation. AI-based algorithms can identify and surface top candidates with increasing ease, speed and accuracy. And sophisticated chatbots, using conversational AI, can source, screen and schedule interviews in minutes at scale. The same chatbot can remind the candidate of their scheduled interview and help them reschedule or cancel, reducing the dreaded ghosting phenomenon. It can then assist with onboarding them as a new hire, answer questions about benefits and identify new internal opportunities that the employee might be interested in based on their skills. This not only makes for a much more efficient and effective talent function as a whole, it improves both the candidate experience and employee engagement.

Q: How can HR departments ensure a smooth and successful implementation and execution of new HR technologies?

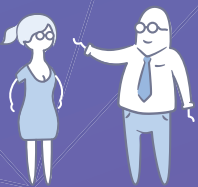
A: Once you decide on where to invest your scarce HR-technology dollars, the fun begins. Any successful implementation takes planning. It starts with doing the appropriate due diligence on the technology and the vendor in which you are investing. Does the vendor have referenceable customers that are similar in size and in your industry? Is the product integrated with your core technology stack? Does the vendor invest the time to understand your current workflow and desired future state? What is their onboarding process? Does the product require training, and how is that training accessed by your team? What internal resources are required to ensure smooth implementation? Talk to their clients to understand the good, the bad and the ugly of their implementation process so you can avoid or minimize problems before they arise.

The company whose technology you are buying should not be just another vendor, but rather a partner who is investing in you as well. The quality of the product, and the integrity of your partner, are both critical for long-term success—take the time to do your homework before you buy.



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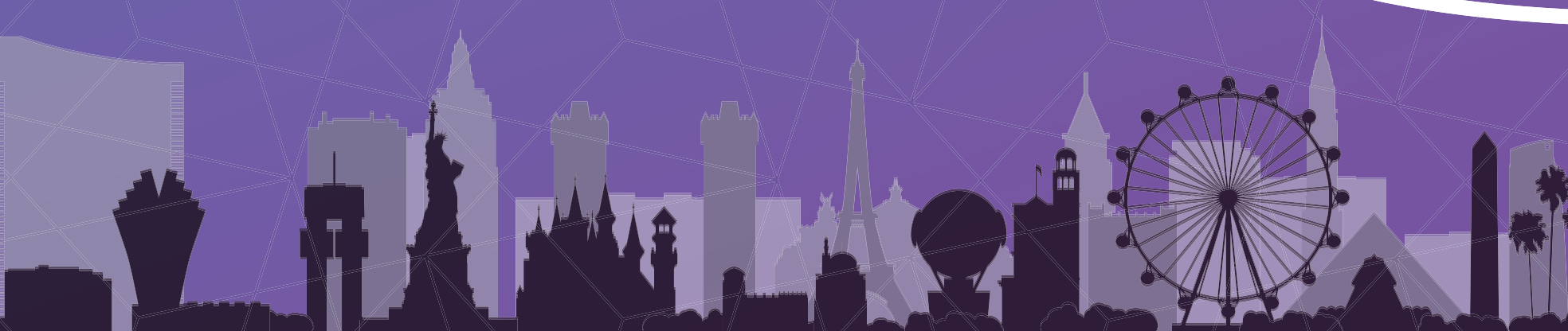
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Q&A

ON HR TECHNOLOGY



Adam Rogers, co-chief executive officer and chief technology officer, Ultimate Software



Q: Where should HR leaders be focusing their HR-technology investment in the next 12 to 24 months?

A: It's an exciting time for HR. Technology is advancing exponentially, workforces are more innovative than ever and HR is firmly established as a strategic business partner. Many HR departments are operating with more budget and authority than ever before, but the constant deluge of new technology can make investment decisions overwhelming.

I believe HR is responsible for improving employees' lives. As such, I suggest investing in solutions that can help you better understand your people—what they want, how they feel and how HR can help—while improving their experiences, streamlining workflows and boosting productivity.

What's good for your people is also good for business, leading to better engagement, productivity and overall business health. This is particularly true in today's economy, where record-low unemployment and record-high turnover make attracting and retaining employees harder than ever.

The best way for leaders to understand their people is to listen to them, but this can be difficult to scale. Annual performance reviews are rarely the optimal time to garner feedback, and qualitative employee-satisfaction surveys require significant manpower to analyze. Fortunately, by applying natural-language processing and machine-learning algorithms to open-ended, text-based

surveys, managers can keep a pulse on their team's health and use these metrics to guide one-on-one conversations, find opportunities to improve and drive organizational change. These tools can also help leaders anticipate employee behavior and proactively prevent turnover and attrition.

Additionally, a new wave of case management and HR-process-automation solutions can help HR become more impactful throughout the entire organization. These solutions, which can include everything from document and file management to intuitive and personalized employee portals, can prevent HR teams from drowning in tedious processes while significantly improving the employee experience.

Q: What emerging technologies are likely to have the greatest impact on HR effectiveness and business performance?

A: Again, I think this ultimately comes down to the overarching umbrella of the employee experience.

The secret lies in switching the focus from employee engagement to employee experience, which encompasses every aspect of the job—from the technology that's available to relationships with colleagues. We can measure engagement, but we can proactively design and manage employee experience, just as software-development teams design user experiences. And therein lies the power.

The tools employees use to get their jobs done, as well as those used to access pay, benefits and other standard HR information, can have a significant impact on the employee experience. Several years back, we ran a study and learned that one in three employees would consider leaving their jobs due to outdated technology—a statistic that surprised even me.

Because of these factors, I believe HR-service-delivery tools—which are still relatively new to the industry—are well-positioned to significantly improve HR effectiveness in the coming years. Service-design thinking, robotic-process automation and intelligent design come together to streamline and automate workflows, boost productivity, and standardize case and file management. Employee requests are expedited and addressed more efficiently, while HR teams

are freed to focus on building relationships with their people and designing long-term strategic initiatives.

Robotics-process automation is another powerful AI-driven tool that allows applications to communicate with each other and execute complex processes, such as employee onboarding, without the need for manual intervention. That means less tedious tasks for HR professionals, a seamless experience for administrators and managers, and a better employee experience for everyone.

Q: How can HR departments ensure a smooth and successful implementation and execution of new HR technologies?

A: While application program interfaces and other technological solutions can certainly help in this regard, the bottom line is that successful implementation and execution relies on high-quality customer onboarding and service experiences. If a vendor's support infrastructure is lacking, seamless execution is highly unlikely.

Too often, HCM buyers focus heavily on product features and functionalities while essentially disregarding customer service. A 2019 Kelton survey found a staggering 85% of HR decision-makers regretted their HCM technology-provider choice—that's up 8% from 2016—and inadequate customer service was the primary reason cited. Many HR solutions are failing to meet their customers' expectations when it comes to the quality of partnerships, high training costs, and data migration and communication challenges.

Issues stemming from poor service, training, communication and implementation can have a long-lasting impact on HR's ability to achieve organizational goals. I suggest leaders research customer retention and satisfaction rates, thoroughly evaluate the support experience, and determine the availability (and cost) of consulting services, online resources and training.

Finally, look for vendors that offer an intuitive, guided setup, with communication built in every step of the way. Your HCM provider should make you feel like a highly valued partner and provide you with personalized, proactive assistance. My best advice is to find a provider who's as committed to your success as you are.



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Q&A

ON HR TECHNOLOGY



Steve Engdahl, chief product officer, Access



Q: Where should HR leaders be focusing their HR-technology investment in the next 12 to 24 months?

A: HR leaders are facing the challenges of a rapidly evolving workforce, sustained pressure on cost of operations and a regulatory landscape that is introducing new requirements that are not optional.

It's critical for HR leaders to change the modes in which they engage their current and prospective employees, providing simple tools for employees to obtain information or request assistance. We're seeing a continued move to HR shared services as a means to support company growth and cost efficiency within the HR team, operating on a core backbone of integrated SaaS systems. But, data privacy and retention laws designed to protect consumers now vary by country and even by state, compounding how sensitive employee information can be obtained, shared, stored and managed.

It's tough, but not impossible, to serve these competing masters simultaneously. In fact, as leading companies develop their technology strategy for HR, they often discover that systems consolidation and centralization projects that reduce overall cost can also provide a platform to more easily roll out new tools to enhance the employee experience, and to adopt a sound information-management strategy to drive compliance.

Q: What emerging technologies are likely to have the greatest impact on HR effectiveness and business performance?

A: The very technologies that can have the greatest impact on HR effectiveness also can have the least impact. Very powerful emerging technologies, such as AI, which is getting a lot of interest at the moment, are nothing more than the next shiny object unless their deployment into HR processes is very focused around solving specific business problems.

Rather than focusing on specific technologies, we find that the most successful companies and technology projects begin with an assessment of their business problems and opportunities, then find the right solutions to address them. AI can be great, and we've seen it be really impactful in areas such as automating employee communications and reducing the administrative burden of processing information during the employee onboarding process, for example. But, without a clear use case, it becomes an expensive (and often failed) experiment.

On a practical level, the HCM system serves as the operating system of the HR department. It's important to recognize that even the best HCM systems won't cater to every need. When it comes to information governance, one area that is commonly underestimated is management of employee documents, where it's too

easy for multiple copies to get propagated around the organization and where lack of visibility prevents HR from being proactive about spotting incomplete, inaccurate or expired information, which could lead to non-compliance. Luckily, there are more options today than there were even a year or two ago, which can help.

Q: How can HR departments ensure a smooth and successful implementation and execution of new HR technologies?

A: Think big for strategy, but execute in small chunks. The world HR operates in is changing rapidly, so long projects can get outdated before they ever go live.

Think about the sequence of events, which can de-risk the entire project. For example, when implementing a cloud HCM system, how can you leverage the rest of your ecosystem to facilitate your transition from old to new? We find that some HR technologies are very well suited not only to de-risking core system migrations, but also help accelerate data and system migration following merger/acquisition events. Find those technologies, and get them in place first.

Recognize, with every project, that employee data and documents must be treated as sensitively as consumer data. Keeping that in mind at the start of each project, rather than as an afterthought, will help your company stay out of the headlines.

Steve Engdahl leads the product and engineering teams driving Access' growth through SaaS software solutions. Steve has enabled both public and private software companies to successfully achieve market and revenue expansion through solid vision, highly motivated teams, market-focused product-development roadmaps and customer-focused delivery. Prior to joining Access, Steve was head of technology products for Altisource Portfolio Solutions, and he has held global strategy, product, customer success and marketing leadership roles with Goldensource Corp., Charles River Development and CheckFree (now FISERV). Steve began his career as a systems analyst at M&T Bank and holds a bachelor of arts degree from Cornell University.



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Q&A

ON HR TECHNOLOGY



Rae Shanahan,
chief strategy officer,
Businessolver



Q: Where should HR leaders be focusing their HR-technology investment in the next 12 to 24 months?

A: You need to focus on the employee experience. Employees are inundated with apps and tools to connect with each other at work and to recognize each other at work. There's the technology to do their work and every vendor interacting with your employees has their own app, website access, text messages and emails. There's a lot for them to learn and manage.

You rarely hear things like, "I just wanted to tell you my benefit deductions are correct," or "I went to the ER and my ID card worked!" Instead, there's a very vocal minority providing feedback, which creates an unconscious bias that can impact decisions. A big challenge—and opportunity—is to acknowledge this and not allow it to cloud perceptions of the larger employee populations as you make new HR-technology decisions.

Your employees expect personalization; "one-size-fits-all" programs won't get

adopted. So, what should you do before making another purchase decision? I encourage you to apply empathy and really audit the employee experience, which directly impacts employees' engagement.

Take off your HR hat and put on your employee hat. How many tools are your employees supposed to use? Where do they have to go to get information? How many websites, apps and phone numbers do you tell them to use? I would challenge you to step back and work to connect all the dots to get to a place where a positive employee experience is a strategic goal. Then, you can look for technology solutions to meet your goals.

Q: What emerging technologies are likely to have the greatest impact on HR effectiveness and business performance?

A: Since employees are the biggest asset and also the biggest expense at most organizations, I will answer by continued focus on the employee experience. Employees expect

access to what they need 24/7; they expect to navigate you, their employer, similar to how they navigate their life—by using artificial intelligence along the lines of Alexa and Siri. AI has primarily been used in the HR space related to recruiting/talent acquisition. For several years, we have offered an AI-powered virtual benefits assistant, Sofia, to support employees related to benefits. It is the application of AI in the spirit of "service and employee experience" that will have the greatest impact on HR effectiveness. In 2020, Sofia will expand from the virtual benefits assistant to Sofia, the employee experience navigator. She will be able to access employers' HR applications, along with the vast library of documents and data sources to be the one-stop access to all things employees need 24/7/365. Using natural-language processing and sentiment analysis, she will even be able to converse with employees.

Overcoming roadblocks to access, providing a personalized experience and offering 24/7/365 support removes distractions, and it improves the employee experience. Better access leads to increased employee engagement and employee retention—all of which improves your effectiveness and business performance.

Q: How can HR departments ensure a smooth and successful implementation and execution of new HR technologies?

A: Never underestimate the impact of implementing technology on your teams and your employees. And don't forget about adoption. Just because you implement something, it doesn't mean employees will use it. A "build it and they will come" approach doesn't work and doesn't drive adoption. Employees need to understand what's in it for them with the new technologies; you need buy-in for success. You will also need the support and partnership among all levels within an organization to ensure adoption and use. I recommend reading Seth Godin's book, *This is Marketing*, to help you with ideas to reach your employees effectively and gain the buy-in that will make implementation and execution successful.



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Q&A

ON HR TECHNOLOGY



Pat Wadors, chief talent officer, ServiceNow



Q: Where should HR leaders be focusing their HR-technology investment in the next 12 to 24 months?

A: Employees today want to be heard and valued, and they want an employee experience that meets their needs during the moments that matter to them. HR leaders should first map out the employee journey and define the experiences they want employees to have at each phase. Then, they can determine the technologies that will help them achieve those outcomes.

Research shows that HR and IT drive more than half of all employee-service requests. This is one of the reasons I partner closely with ServiceNow's CIO. Together, we seek to understand the optimal employee experience and the technologies that will help us get there. Although HR commonly owns the overall employee-experience initiatives, a truly digital employee experience requires partnership with IT.

The benefits are clear: By aligning, HR and IT can improve enterprise-wide productivity and service-level agreements, identify how to remove friction points across the employee experience and decrease the cost of technology architecture.

Ultimately, multiple technology solutions contribute to the digital employee experience. Understanding the big and small moments that matter to employees and then investing in the technologies that improve those critical moments will create a more engaged and productive workforce.

Q: What emerging technologies are likely to have the greatest impact on HR effectiveness and business performance?

A: One-third of our lives is spent at work. And, because technology has made our home lives simple, easy and intuitive, it's natural that employees would want their experiences at work to be more like their experiences at home.

For instance, in our home lives, we're used to our mobile devices having all the answers and voice-activated devices helping us get things done. Work shouldn't be any different. Mobile-first applications can help employees get things done on the go, and integrating voice technologies to help power chatbots, voice assistants and more can be extremely beneficial.

All of these are powered by increasingly human-like artificial intelligence and machine learning. The more we use

these technologies, the more our tools will continually improve. And, the more easily technologies can solve everyday work problems, the more time employees will have for creativity, advanced problem solving and innovative thinking.

Q: How can HR departments ensure a smooth and successful implementation and execution of new HR technologies?

A: There's more to a transformation than just technology. Companies should consider these strategies to transform the way they work:

- **Build and structure new work teams:**

Designing for a successful workplace strategy requires a cultural shift across HR, IT and other departments. The idea is to define new skills and talent, as well as structure teams in a way that encourages ideation and allows for work to easily flow across groups.

- **Partner across the company to remove friction:** When employees have questions or need help from HR, IT and other departments, they face the complexity of siloed processes and multiple systems. Partnering across the company and investing in cloud-based technologies that hide the complexity from employees helps them be more productive and improves enterprise-wide productivity.

- **Deliver a mobile-first experience:** Today's generation is digitally native; they've grown up with smart phones at their fingertips. Companies should show they understand employees' expectations by giving them a single place to find answers, get help and get things done, with a simple swipe, click or chat.

- **Design end-to-end digital workflows:** If employers take a people-centric approach, they can reimagine the big and small moments that matter for their employees. Human capital management systems often have gaps in employee journeys that extend outside of HR (onboarding, relocations, leaves of absence, etc.), which create an inconsistent experience and add unnecessary complexity. Leveraging technologies that work better together with a cloud HCM system can fill in the workflow gaps and make it easy for employees to get the services they need.



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Q&A

ON HR TECHNOLOGY



Tom Hammond,
vice president of corporate
strategy and product
management, Paychex



Q: Where should HR leaders be focusing their HR-technology investment in the next 12-24 months?

A: The latest employment data show that the tight labor market continues to impact many employers, particularly small-to-midsize companies. As such, talent-management solutions—which include talent acquisition/recruiting, performance management, learning management, career planning and more—are an increasingly important aspect of HR technology that can give organizations an edge in both recruitment and retention. The data HR leaders can access and analyze through a talent-management solution can provide insights that inform strategy throughout the employee journey, from hiring profiles to high-performance results and everything in between. Talent-management solutions also provide valuable tools to deliver efficiencies across the organization.

Offering nontraditional benefits and perks is another tactic HR leaders are utilizing to attract and retain top talent today. According to the *2019 Paychex Pulse of HR Survey*, flexible scheduling, tuition reimbursement and career-development programs are the three most common perks businesses offer employees today. As part of both

traditional and nontraditional benefits programs, most employees expect employers to provide them with a high level of employee self-service that allows them to accomplish benefits administration and other HR tasks (update address, enter life event, fill out tax forms, report hours, manage retirement, etc.) on their own.

Q: What emerging technologies are likely to have the greatest impact on HR effectiveness and business performance?

A: It's estimated that one in six American adults now owns a smartwatch. There is no doubt these wearable devices have already had a major impact on consumer tech habits, but we're now entering an era in which wearables are set to play a growing role in workplace culture as well. Some employees, for example, clock in and out via a wearable device, making the time-and attendance-tracking process easier for an increasingly remote workforce and reducing the chance of time fraud. We're just scratching the surface with this technology so far. Companies like ours are exploring other options with wearables, including the ability to influence insurance premiums based on things like exercise and driving habits.

Pay flexibility is another increasingly impactful trend. According to a CareerBuilder survey, 78% of Americans are living paycheck to paycheck—that's a major portion of the population. As a result of that reality—and evolving technology—how and when employees want to get paid is changing. Organizations need to look for a way to support these employees in order to keep them. Pay flexibility can include pay on demand, which gives workers access to wages that are earned but not yet paid (typically done using a third-party pay card or other payment method and not through a network like ACH), and real-time payments, which are completed using a network like ACH but on a different rail for faster delivery.

At the end of the day, employees who are happy and fulfilled in their personal lives—which includes finances—are more likely to be engaged in their work. HR leaders should be exploring all technology options to optimize employee wellness from every angle.

Q: How can HR departments ensure a smooth and successful implementation and execution of new HR technologies?

A: An HR-technology solution works only as well as the people using it. Taking time to implement these tools is essential to ensuring that HR leaders' technology investments are making the most positive impact on a business and its people as possible. As employee self-service continues to grow, implementation must extend not just to the full HR team but to the entire organization.

The good news is, more and more HR solutions are evolving to incorporate user-friendly technology that mirrors the look and feel of common consumer apps—but ongoing training is still key to making the most of these tools over time. Users will quickly get to know routine tasks, but what about those they only do once a year, like open enrollment or paying bonuses? Systems should support ongoing training in multiple formats, allowing employees to decide how they'd like to learn—whether it's through a written training document, video tutorial, in-app walk-through or another style of training.

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Q&A

ON HR TECHNOLOGY



Ryan Ross,
managing partner, Hogan
Assessments



Q: Where should HR leaders be focusing their HR-technology investment in the next 12 to 24 months?

A: The rush to be agile, digital and big-data-focused seems to have run its course. That is, the ship has sailed on companies being able to promote their big-data, AI-driven, automated processes. What we know from employee-engagement research is that most employees feel more like a number versus a person, now more than ever before. In a tech world dominated by chatbots, auto-decision workflows and data mined from everything the employee does, the HR side of HR seems to have gone by the wayside. That said, HR executives should now be investing their time and attention into technologies that engage the employees. Systems still can use all of the latest technology; however, the investment needs to be made in keeping the people in the process. Having real people still involved in performance evaluations, development and critical pay-for-performance discussions can enhance not only the reputation, but also the value of HR teams—making employees feel human again and not just a carbon entity with a number.

Q: What emerging technologies are likely to have the greatest impact on HR effectiveness and business performance?

A: Given the innovation and speed at which machine learning and artificial intelligence have been baked into HR technologies, surely there are specific applications that will drive effectiveness and business performance. Several of these emerging technologies focus on learning and development. Recently, at a TechHR conference in Delhi, approximately 30 vendors were vying for attention in the leadership and employee-development market. These technologies look quite promising—primarily because they are built around big data and deep learning concepts to drive customized and targeted learning material based on what the system knows about the participant. Additionally, the ease at which virtual reality can be leveraged takes experiential learning to an entirely new level. These systems have the ability to impact HR in three ways. First, these systems can learn. Participants can be presented with what is new, targeted and focused on their preferences and learning styles. Second, these systems can evaluate. Integrating learning and

development programs with real, in-the-moment performance feedback helps steer more personalized content, as well as provides HR with a real-time gauge of improvement. Third, these systems can drive engagement—and engagement drives business performance. Participants who feel the organization is focused on their betterment and has created a customized development process that is interactive and has a “cool” factor are more engaged.

Q: How can HR departments ensure a smooth and successful implementation and execution of new HR technologies?

A: As with anything new, execution is key to success. The HR-tech graveyard is littered with systems, solutions, apps and HRXML. Technologists are visionary producers who perhaps over-focus on functionality versus usability. Given the shift to agile software development, the same concepts should be applied to the implementation of new technologies. Focus groups and internal alpha launch teams may seem so 1980s; however, we have learned time and time again that, without proper user testing and feedback, off-the-shelf implementations will fall flat. In addition to user and focus groups, attention should focus on the human engagement factor. That is, do our employees find enough value in this new technology to actually engage with it continually and after an initial need? So often, we hear the statement, “I set up my information, now can you do these things for me?” Too often, the response is, “Yes, it is faster outside the system.” Properly designed systems without slick, easy user interfaces are destined for failure. The days of DOS-based command prompts are gone; if something can’t be accomplished in a few easy clicks, employees will just hit delete. Buy-in will also increase if the organization reports on useful metrics or business objectives achieved through the use of the technology—as in, if you are going to make us use it, perhaps we should hear about the value? Perceived value drives engagement and, to be repetitive, engagement drives business performance.



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Q&A

ON HR TECHNOLOGY



Marc Costantini,
executive vice president,
commercial and government
markets, Guardian Life
Insurance Company of America



Q: Where should HR leaders be focusing their HR-technology investment in the next 12 to 24 months?

A: Over the last several years, the market has been flooded with technology designed or adapted to help companies solve human resources challenges. It can be tempting to focus on the promise of a new platform, but HR leaders should first prioritize employee needs, align to business imperatives and then look for a technology—or combination of technologies—that can address them. Rarely does one tech solution meet all of a company's requirements after going through such an assessment.

Benefits administration is one technology area where we continue to see growth and interest. With more employers offering high-deductible health plans, health-savings accounts, and supplemental health and other voluntary benefits, the management of benefits has become quite complex. The right technology can make administration of benefits easier and provide a user-friendly experience for both administrators and employees.

A 2017 Guardian workplace-benefits study revealed that, while more than three in five employers expressed

difficulty in managing their benefits because of growing complexity, employers that had more digital-tech deployment reported they were more efficient and overall more satisfied with their benefits delivery.

This benefits digitalization has sparked employers to increase their spending on benefits-related technology in the past five years. According to the workplace-benefits study, about 50% of businesses also anticipate further increases in the next three years to address their top challenges, such as controlling benefits cost, increasing efficiency, ensuring compliance and improving workforce engagement.

Q: What emerging technologies are likely to have the greatest impact on HR effectiveness and business performance?

A: HR leaders can also be less concerned about finding a single solution due to the advancement of application programming interface tech that can connect the best solution for a particular need to other core technology. This allows leaders to, for example, select a vendor that provides the best human capital management solution for their needs with the comfort of knowing a platform API will allow it to dock in.

Process automation and API technology are impacting the benefits-technology landscape today by helping simplify an employer's benefit-plan administration and enabling time- and cost-saving features like real-time exchange of member-level enrollment data. Also notable is artificial intelligence, which is already deployed in chat bots providing front-end support and serving as talent recruiters. Vendors are also leveraging AI to create more refined decision-support tools that drive employee engagement and enrollment participation, and many more AI-based solutions are on the way.

Q: How can HR departments ensure a smooth and successful implementation and execution of new HR technologies?

A: HR departments should provide as many requirements as possible during the procurement process and ask each vendor for a milestone project plan that includes expected completion dates with their proposal. They should also factor in the following:

- Set realistic goals around the speed of delivery and how much cost, time and resources are required to implement new technology. Benchmark against past projects or vendor cases that have been implemented successfully when possible.
- Confirm that a technology partner has committed to supporting the implementation in a way that is agreed to up front to avoid unanticipated expense and staff deployment.
- Ensure the procurement process can be completed in time for the selected vendor to implement their project plan to hit their target go-live date.

Lastly, plan ahead and have an executive-level team member engaged in the process to allow expeditious resolution to challenges along the way, project managers on both sides to drive deliverables and accountability, and a communications plan to encourage awareness and adoption of the new tech so the investment pays off for the company and its employees.

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HR Technology

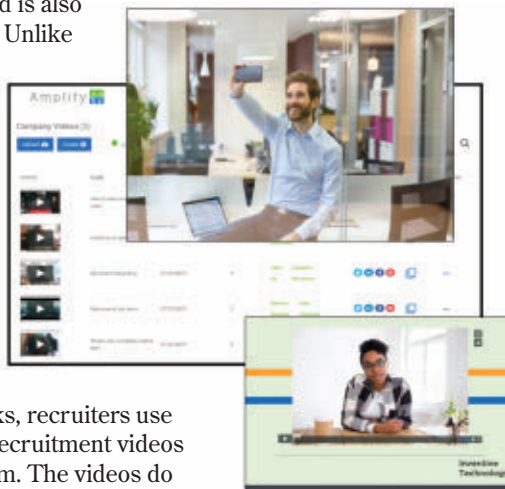
Amplify VMS

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What It Is: Amplify is a one-stop shop for recruitment videos. As video gains traction in the recruiting space, Amplify aims to help organizations streamline processes for creating, sharing, distributing and cataloging videos. It is the only solution of its kind that allows clients to both upload existing content and create their own on the platform—and is also the only that does not rely on an app. Unlike YouTube hosting—where videos can be sidetracked by advertising and other obstacles—Amplify hosts the content, which can be pushed through the creation, approval and distribution processes in just minutes.

Why We Like It: Simple and quick are hallmarks of this product. When a job req is created, a manager inputs a vision for the video and pushes it to a recruiter via an email link. With just a few clicks, recruiters use a personal recording device to craft recruitment videos that they input directly into the system. The videos do not save on the user's computer or phone—cutting down on disparate processes and privacy concerns. The system enables assigning supervisors to approve or decline the content—which can be a prime opportunity to work with recruiters on brand education—and, if approved, the video can be pushed directly to linked social-media accounts or generated into a link for email distribution. Without needing much technical prowess or time investment, recruiters can kickstart the hiring process, all while conveying a truer taste of the organization's culture than may be available in a written job summary. Additionally, content—both created in the system and inputted from other locations—is searchable and taggable on the back end, which can be a treasure trove for organizations looking to delve more deeply into video recruiting.



Olivia Hire for Retail & Restaurant

Paradox

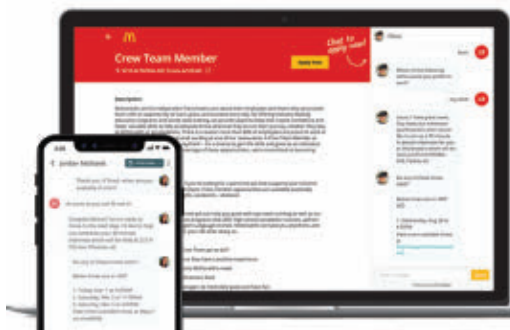
paradox.ai/hire-retail-and-restaurant

What It Is: Olivia Hire facilitates each step of the hiring process for busy restaurant and retail hiring managers, eliminating recruiter involvement or lengthy times-to-fill. Entirely mobile-enabled, the product uses chatbot “Olivia” to bridge the gap between candidates and hiring managers. On the candidate side, she determines eligibility in early screening and can be utilized throughout the hiring and onboarding processes. On the employer side, hiring managers are urged to think of Olivia as a personal assistant, setting up a pool of candidates and storing all the information they need to make a quality hiring decision right from the palm of their hand.

Why We Like It: Hiring managers in high-volume restaurant and retail settings—which may also have high turnover rates—need to prioritize speed and efficiency,

where Olivia shines. Once the employer pre-populates job requirements into the system, the manager simply has to toggle the job on or off to open up applications on the employer and career sites. The product is voice-enabled, so, while on the floor of the shop or restaurant, a manager could ask Olivia which jobs are open—and she is designed to prompt

the manager about making changes to the position. She offers similar convenience for candidates—available both on the web and through text—using conversational language to make eligibility determinations based on job requirements. She taps into the manager's calendar to auto-schedule interviews, offers applicants nudges for next steps and can answer questions about the position and process. Olivia can be utilized to eliminate burdensome administrative tasks, such as sending offer letters and onboarding documents, feeding into the overarching goal of ensuring both candidates and hiring managers are up to speed and using their time effectively.



Next Gen HCM

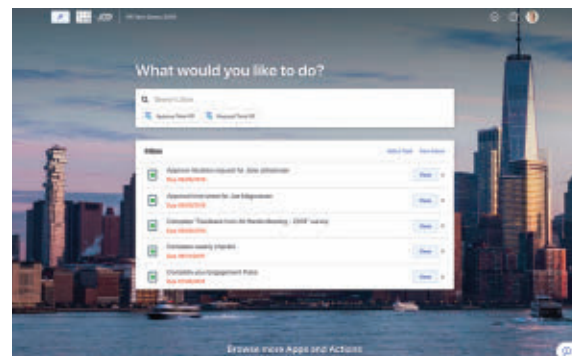
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What It Is: Next Gen HCM is ADP's new human capital management platform that's designed to accommodate the team-based structure of many of today's organizations. Managers can use the system to keep track of people with whom they have a “dotted-line” reporting relationship—for example, they can see who is or isn't available for a project due to vacations or other commitments. Next Gen is also intended to make it easier for organizations to manage relationships with non-traditional workers, such as independent contractors.

Users can pick and choose which functionality to add to the platform from third-party apps, including those available on ADP Marketplace. The product's “low-code development” is intended to make it easier for users to configure the system to their organizations' particular needs without enlisting coders.

Why We Like It: ADP has invested some serious time and money in this product, and it appears to have paid off. Built from the ground up to reflect the way today's modern organizations operate, Next Gen HCM is a cloud-native platform that offers a seamless way for managers to interact with, monitor and motivate the people on whom they depend. The system's AI and predictive-analytics capabilities can help ensure organizations aren't caught off guard by events such as spikes in overtime or abnormal turnover. Its conversational mobile interface not only makes it easy for users to stay connected but also enhances the likelihood they'll use it regularly. We were particularly impressed with the product's low-code development platform, which enables clients to make changes simply by moving objects on a screen. If anyone has doubts that ADP has moved well beyond just payroll, Next Gen HCM should quickly dispel them.



Montage Intelligent Recruiting Assistant (Mira)

Montage

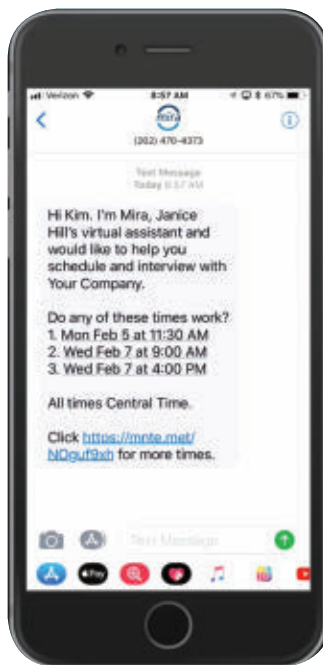
engage.montagetalent.com/mira

What It Is: Montage Intelligent Recruiting Assistant, or Mira, offers a suite of recruiting tools that aim to enable faster, more efficient processes, such as on-demand text interviewing, automated self-scheduling and “Unbiased Candidate Review,” which masks candidates' identities during on-demand video interviews to help ensure that decisions are made based solely on the content

of their responses. It uses a chatbot for on-demand text interviews, in which candidates can answer qualifying questions without a recruiter needing to be present.

Why We Like It: If your recruiting function is feeling overstretched and under-resourced, Montage's Mira may be worth your time. It offers clients the choices and configurability that many recruiting teams cry out for.

The self-scheduling function eliminates the potential hassle that can lengthen time-to-fill rates, while its text-based interviewing capability can greatly improve convenience and accessibility. Hiring managers choose whether to conduct interviews via chatbot, phone, text or in person. And, last but not least, its candidate-masking feature makes it easier for companies to provide the bias-free selection process that job seekers deserve. By combining these capabilities into one easy-to-use platform, Montage has created a product worthy of serious consideration.



SHL Verify Interactive

SHL

shl.com/en/assessments/cognitive-ability/shl-verify-interactive/

What It Is: SHL Verify Interactive is a cognitive-ability assessment suite designed for the small screen on mobile devices.

The tests measure general mental ability, deductive reasoning (drawing conclusions from partial information) and inductive reasoning (drawing inferences from, and understanding relationships among, various concepts). Candidates work on real-world tasks, such as reading business-related statements and determining which of the listed options cannot be true or must be true, interpreting charts and graphs, and reconciling cash-register totals. It uses multi-point scoring (partial credit for responses), which reduces testing time. The tests include 30 items in 36 minutes and generate separate scores for each ability. While these tests can be administered on any platform, all parts of each question fit on a single mobile-phone screen, eliminating the need to scroll or remember information across multiple pages, eliminating the common disadvantage of mobile test-taking.

Why We Like It: By providing a mobile-friendly series of tests, this product can enhance candidate diversity, since those with mobile-only access may also be less affluent than other applicants. Likewise, the tests are provided in English, German, French, Dutch, Italian and Simplified Chinese. Other companies' mobile-optimized tests often feature non-business-related puzzles. While they may yield accurate results, the gamification aspect may lead candidates to misunderstand their importance. Plus, the shorter time SHL tests take compared to others can reduce candidate drop-off.



Virtual Reality Inclusion Experience

DDI

ddiworld.com/vr

What It Is: Virtual Reality Inclusion Experience provides an immersive, virtual-reality exploration of what it feels like to be undervalued because of insensitivity to diversity. HR leaders are well aware of the business benefits of diversity, but many,



especially those in the “in group,” lack the emotional experience of being undervalued—and, thus, have problems empathizing with those who have. Using VR headsets, users interact with virtual characters in scenarios that give them the experience of having their opinions and ideas

ignored, undervalued or even derided. Immediately after the VR experience, users join together to discuss their feelings about the session, using questions and discussion topics suggested by DDI. After the initial training, HR leaders can repeat the VR experience before engaging in potentially difficult conversations focused on diversity.

Why We Like It: While VR experiences are not often designed to make users feel marginalized, this one really leans into situational discomfort. Strapping on the Oculus VR goggles reinforces the feeling that the user is actually “living” in the experience and, therefore, can feel freer to experience the emotions associated with being a member of an undervalued group in a business setting. We especially appreciate how nuanced, negative expressions and gestures (such as eye rolls, sighs and head shakes) from the actors in the simulation can clearly be seen and felt by the user. It's truly an uncomfortable immersive experience—for all the right reasons.

AllyO Sourcing

AllyO

allyo.com

What It Is: AllyO Sourcing, part of the overall AllyO Recruitment Automation product suite, is a scalable, omni-channel candidate-engagement platform that primarily uses artificial intelligence to reach and attract large numbers of job candidates with minimal resources and time. It does this through an automated scan that connects workflows, talent-pool campaigns and live, one-on-one texting conversations—all fully integrated into an organization's applicant-tracking system.

Why We Like It:

Welcome to the emerging world of AI-driven candidate sourcing. Most employers know about wasted time and resources as they struggle to reach the best job candidates—especially when they are looking to hire on a larger scale. Watching AllyO Sourcing in action, you can see how it automates the job-candidate process by scanning and parsing applications, reaching out via text and web chat to screen them into a job requisition, and, finally, immediately adding them into the employer's ATS. Bottom line, AllyO claims its sourcing platform can improve the “capture and apply” process by two to six times through its “conversational job matching” across all sources of inbound and outbound talent acquisition. It's available around the clock in multiple languages across multiple channels, including web, text and email. It also allows candidates to continue the application conversation seamlessly on different channels (career pages, job boards, text applications, post-application, internal mobility and referrals), a critical feature in today's multi-device, mobile world.



Streaks

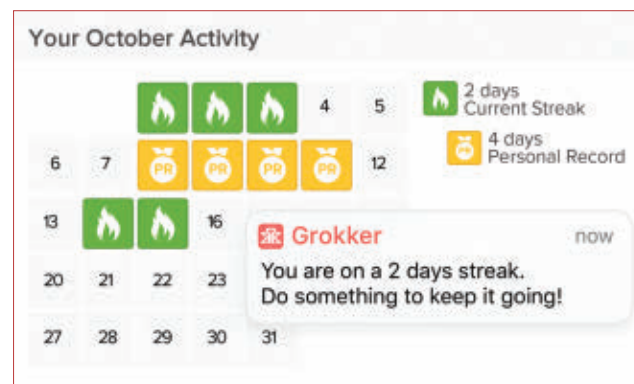
Grokker

grokker.com

What It Is: Streaks, part of Grokker's on-demand wellbeing solution, is a first-of-its-kind corporate engagement and inspiration feature that uses a combination of daily rewards and digital reminders to keep employees on a path to positive change. Available on desktops and as an app for mobile devices, it uses an Encourage, Track and Reward model that lets users see their healthy behaviors mapped out over time. It captures multi-day streaks and personal records on a user's Achievement Calendar and profile. It also credits user activity across fitness, mindfulness, nutrition and more (including Apple and Fitbit platforms). The app also awards milestone badges (it just introduced a 100-day badge) and “kudos” to inspire users to stick to resolutions and to stay active.

Why We Like It: Making a meaningful lifestyle change—no matter how beneficial the results may be—can seem like a big disruption. But employees don't need to change their entire lives to improve their wellbeing. Grokker Streaks takes a

positive, proactive approach that reminds us more of a supportive teammate than a demanding coach. For example, if users are in danger of letting a streak end, they'll receive a notification near the end of the day reminding them to do something



to keep it active. Reinforcing continued behaviors seems like a great way to pave the path to wellness, and this product delivers.

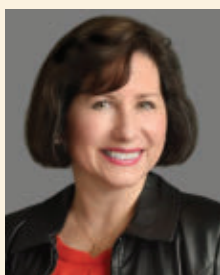
Send questions or comments about this story to hreletters@lrp.com.



Introducing Select HR Tech: An 'Immersive' Experience

About the Conference Chair

Throughout her career, Select HR Tech Conference Chair Jeanne Achille has helped launch and promote thousands of new tech products, services and companies. After a successful run as a sales and marketing executive in the HR-tech industry, she founded the Devon Group at a time when women-owned tech-centric businesses were considered atypical. As CEO of Devon, she's supported hundreds of successful exits from initial public offerings to strategic mergers and acquisitions, serving as trusted counsel to CEOs, leadership teams and investors.



Achille is also the program chair for the Women in HR Tech Summit, which is held at the HR Tech Conference in Las Vegas and at the HR Festival Asia in Singapore. A graduate of Northwestern University's Kellogg School of Management, with a focus on organizational leadership, she is passionate about the importance of creating communities and supporting workforce diversity and inclusion.

Are you the type of executive who's looking for a roll-up-your-sleeves experience with HR technology? If so, then the creators of *Human Resource Executive*® and HR Technology Conference & Exposition® have a new conference just for you: Select HR Tech.

"Immersive is the key word here," says Select HR Tech Conference Chair Jeanne Achille. "Select HR Tech is really intended for those folks in the trenches who have ownership of HR-tech projects in organizations and who are being measured by their ability to optimize the HR investment."

According to Achille, the conference is designed to give attendees the opportunity to:

- examine how to effectively use existing systems to their full potential;

- assess and determine what technology is best for their organization;

- take a personalized and forward-thinking, tactical approach to RFP, implementation and integration processes; and

- demonstrate the value of HR-technology investment to gain buy-in or continued support of stakeholders.

This "intensely collaborative" event offers facilitated practical conversations with peers about solutions to common pain points, Achille says, as well as in-depth master classes to determine which technology solutions are best for your organization's current and anticipated future needs.

It also features small group discussions with industry analysts to learn more about the industry, solutions and trends; collaborative networking to hear real-world lessons learned; and the opportunity to meet

HRExecutive.com

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FROM THE EDITORS OF HUMAN RESOURCE EXECUTIVE®



Human Resource
Executive

PEOPLE SIDE OF DIGITAL

By Jason Averbook/Columnist



2020 Will Be HR's Year to Flip the Script

We sure have flipped the script on HR, haven't we? Suddenly, the whole world is going digital, everything is mobile, and the people you're hiring and managing

have better tech on their wrists than you used to find and onboard them. The entire HR-technology industry is talking about the future of work, the role of HR and next-generation technologies, AI (artificial intelligence) and IA (intelligent automation), and digital transformation. The day someone forwarded you an article on the impact of blockchain on the employment relationship, you probably wondered what could possibly be coming next.

HR, you feel no different than the workforce you support. You are part of the workforce, and the strain you feel when your skill set, resources and capabilities are stretched beyond current state is the same strain the rest of the workforce feels. We are all experiencing the digital age, the advent of new technology, the chasm between the way it feels outside of work and the way it feels inside of work. Do you order a new laptop or check your vacation balance (inside of work) as easily as you order a Lyft or check your bank-account balance (outside of work)? That's the strain we feel—the need to do more, better, faster work with the same tools and capabilities we had 20 years ago. We need to close the gap. And HR, you're the ones to do it.

Flipping the Script

The irony in all of this is that you, HR, need to flip the script on yourselves. The future of work is here today—that's the first and most important realization—but it's just not evenly distributed. What's most important about that statement is that HR leaders are going to have to make decisions about their roles: What do you want to be great at? And what is it OK to be just OK at?

The next important realization is around the role of next-generation technologies; they're not to serve the HR function and make it easier to handle the workforce, but rather to serve the workforce. And, if you've served the workforce and the workforce uses tools you provide, the organization adapts in a way that the workforce will trust HR to make their jobs better, versus HR doing things to track them.

To truly flip the script in HR technology, we need to back up the bus. In the 2019 Deloitte Global Human Capital Trends report, 74% of respondents cited HR technology as important or very important, and the same percentage will increase their level of investment in HR technology in the next three years. Yet, few believe they are getting the outcomes or value they expected from that spend. Why? Because all we've been doing for the past 40 years

is transitioning from one technology to another. This will not make HR more strategic, and you will never realize the value of your spend if all you do is transition.

There's a big difference between transition and transformation. We need to think about how to transform the way people work, the roles in the organization regarding data and what HR people are doing. If you're actually transforming, technology will play a key role and it will make HR more strategic. If all you're really doing is transitioning with technology, that won't happen.

Putting Things in Perspective

In fact, our entire view of HR technology needs to be flipped. Employee experience will change the agenda of HR over the next five years—guaranteed—but most organizations will fail, especially if they approach employee experience from a technology-only standpoint versus from a transformation perspective around how people work.

It's really the concept of deployment. There's a big difference between implementation of technology and deployment of capability. So many organizations today implement technology hoping it's a silver bullet versus truly deploying capability. When I deploy capability, it means I'm transforming the organization; true transformation means making changes to how people work. That's not easy stuff, but it becomes easier when you think about technology in terms of impact.

The way organizations need to think about elevating employee experience is really made up of four key concepts. **Mindset** means having a shared vision as to what the employee experience is going to be, then designing an experience for **people** rather than for HR. Think about how you're going to generate data and output from **processes** you design. If you've done all of that, you're in a position to select or evaluate your **technology**.

When you flip the script in these ways, HR will transform from a function designed in the past to be a tactical, reactive function to one that's a proactive, prescriptive and strategic function. I hope to see you at the next HR Technology Conference & Exposition, where my session will explore the difference between digital and technology and take a fresh look at the role HR needs to play to be successful today. It's our time, HR!

Jason Averbook is a leading analyst, thought leader and consultant in the area of HR, the future of work and the impact technology can have on that future. He is the co-founder and CEO of Leapgen, a global consultancy helping organizations shape their future workplace. Send questions or comments to hreletters@lrp.com.

one on one with solution providers to develop a tailored approach to addressing your unique challenges.

"We are looking at having a different conference experience than the HR Tech experience," Achille says. "It's smaller than HR Tech, but it's got a different format, too."

The new conference's focus is on "immersive workshops" and 90-minute master classes taught by experts on such topics as building the business case for HR-technology projects and exploring the vendor landscape. The expo experience will be similarly intimate and immersive, offering one-on-one meetings with vendors and an environment for deeper conversations.

Achille says attendees will learn the answer to questions like "How do you optimize an HR investment, get that ROI and create the foundation for ongoing success?" and more.

"It's really important to understand that people will have the opportunity

"Immersive is the key word here."

— SELECT HR TECH
CONFERENCE CHAIR
JEANNE ACHILLE

to sit across the table from peers from other companies to have networking conversations," she says, adding that, instead of standard, business-card-exchange networking, this will be "the kind of networking where you talk about pain points and lessons learned that might be helpful to you."

That peer-to-peer knowledge exchange is really unique to the Select HR Tech model, she says, adding the conference will also feature "lots of exciting technologies and tutorials for attendees to make decisions about what tech will serve as the underpinning for any HR-tech project."

"Instead of sitting and listening to an expert on a stage," Achille says, "Select HR Tech attendees will sit across the table from peers and industry experts to do a deep dive into what makes HR tick and what will make them successful."

Select HR Tech will be held June 9-11 at Caesars Palace in Las Vegas.

—Michael O'Brien

The HR Technology Conference & Exposition® will be held Oct. 1 through Oct. 4 at the Venetian in Las Vegas. For more information, visit www.hrtechnologyconference.com. Send questions or comments about this story to hreletters@lrp.com.



Influencers Discuss Mistakes in the Implementation Process

John Boudreau and others tackle some of the biggest challenges to tech implementation.

BY HRE STAFF

Below are excerpts of Q&As with several of our inaugural HR Tech Influencers about common challenges when implementing new HR technology (for the full list of Influencers, visit <http://hrxexecutive.com/top-100>):



Jackye Clayton
Director of Success
HiringSolved
Are there certain strategies that are more effective than others when it comes to getting

your workforce to use new HR technologies?

Yes, there are. Start by engaging your team. Allow the people who will ultimately be tasked with using the software to have a voice in choosing what types of technology they need, rather than selecting the shiniest new tool. Next, ensure that whatever tool you choose is scalable enough to adapt to the changing business needs you may have. Lastly, remember, for the software to “stick,” there has to be an onboarding plan that is reinforced by management, and functionality that drives efficiency for the business while allowing for gradual change and learning for the users.

How can HR leaders best make the business case for HR-technology investment?

To make the best business case for HR investing in technology, first, make sure you understand what the business goals are. Oftentimes, HR leaders can easily explain why they need a particular tool but can’t match that up to the business goals. Furthermore, when you write up your business case, make sure you are explaining it in a language your audience understands. Explain how the technology you add will grow the business, not just your team. Next, present your case in a way that maps the tech ROI, the business strategies and the talent strategy. Finally, while it sounds cliché, people really are a company’s greatest asset—and they all have to go through HR. Never let them forget that.

How is HR technology changing the way people work?

HR technology changes the way people work by enabling us to be able to measure their output and job satisfaction differently. It also allows us to find any efficiency gaps and take action to decrease them. It is also allowing us to train our employees on a broader scale, which ultimately reduces turnover and increases talent mobility. Furthermore, HR tech is allowing for more workplace flexibility regarding what types of devices are used, office hours versus remote work, as well as allowing workers to work in a way that’s best for them.



Perry Timms
Founder and Chief
Energy Officer
PTHR
What area of the HR function will be most impacted

by emerging technologies?

Most people would naturally look to things like HR administration, recruitment, or learning and development, but I’m going to go for OD (organization design) effectiveness and development—in the main, because of the potentially huge design implications of more automation in the workplace. People and robots are sharing the workload so there is a need to be more mindful of the wellbeing and stimulation of people in how their work is designed.

What are the most common mistakes HR organizations make in acquiring and implementing new technologies?

I see far too little attention to user- or human-centered design in implementing new technologies. When we make decisions on platforms and applications, HR appears to be caught in a bit of a vendor-led trap—whatever the vendor has, and [the organization] can budget for, is what HR buys. Instead, I’d like to see much more design thinking and specification that challenges the vendors to provide functionality and applications that genuinely enhance the previous incarnation of technology solution for HR processes—not makes it worse but perhaps just [brings it together] on one system.

How is HR technology changing the way people work?

Not enough would be my assertion. I’d like to see HR technologies more integrated into the flow of the working systems people are using for their other work. We all accept that, on our smartphones, we have all the apps we need to “run our lives.” Yet, when it comes (particularly) to desktop technology in the workplace, we have a confusing array of programs, platforms and systems to use.

I believe that we need that single OS/multiple-apps approach to HR tech. I’m used to having project management, communication, document drafting, material design, curation and other things on their own sites, and I can move seamlessly between them as befits my work.



Mara Swan
Executive Vice
President of Global
Strategy and Talent
ManpowerGroup
What’s the single most dramatic

shift you see happening in the HR-tech space today?

We are seeing a significant shift from HR technology that focuses on driving efficiencies and streamlining processes to data-driven innovation that enables us to deliver a better and more intimate candidate and employee experience throughout an individual’s career journey. This is what will fundamentally change the role of HR.

What are the most common mistakes HR organizations make in acquiring and implementing new technologies?

Technology should enable a business strategy, not the other way around. And organizations should remember that technology without people who are willing and able to use it is a wasted investment. Finding the right balance of people, skills and technology is key.

What area of the HR function will be most impacted by emerging technologies?

No area of HR will escape the impact of technology. We need to reframe our approach to HR. Individuals expect B2C experiences, and leaders expect data-led decisions, not gut instinct. That said, we can’t forget that, although we are dealing with more data than ever before,

HR is about people—and helping organizations achieve their goals through unlocking the potential of people is at the heart of what we do.



Eva Sage-Gavin
Senior Managing
Director, Accenture
Strategy Talent and
Organization
Accenture

What area of the HR function will be most impacted by emerging technologies?

The “human + machine” workforce is upon us. Humans and intelligent machines are already rewriting the landscape of work. Jobs will change, as machines handle rote and administrative tasks, while humans are freed to do what we do best—be creative, problem solve, empathize. An Accenture future-workforce survey showed that more than 60% of workers have a positive view of the impact of AI on their work, with two-thirds acknowledging the need to develop their skills to work with intelligent machines. Investing now in growing people’s skills will unlock human and organizational potential tomorrow.

Are there certain strategies that are more effective than others when it comes to getting your workforce to use new HR technologies?

An Accenture study shows that, by 2022, AI could increase employment by 10%—and the very technology that requires employees to get new training can help them complete that training. AI-based adaptive-learning systems guide employees by personalizing lessons, coaching and providing feedback. Through the use of virtual reality and augmented reality, we can simulate real-world situations where employees make decisions and receive real-time feedback. Leading companies are also encouraging skill building through “outside-in” talent exchanges with start-ups, universities, NGOs and the public sector. A robust learning platform combined with the right talent ecosystem works wonders.

How can HR leaders best make the business case for HR-technology investment?

Investment in HR technology should be aligned with overall investment in technology. In their new book, *Pivot to the Future*, authors Omar Abbosh, Paul Nunes and Larry Downes share that, if every company invested in AI and human-machine collaboration at the same rate as the top-performing businesses, they could boost revenues by 38% by 2022. Global profits would reach \$4.8 trillion. For



the average S&P 500 company, this equates to \$7.5 billion of new revenues and \$880 million in additional profit. Talent fuels a company's purpose but also its profits—that's a business case that's hard to refute.

How is HR technology changing the way people work?

At its best, HR technology is teaching leaders, managers, workers, investors, policymakers and other

constituents how to optimize a more fluid work ecosystem, where work and workers can be found and matched based on more “deconstructed” work elements, where work

engagements can range from traditional employment to a variety of alternatives that include human-automation collaboration, and where work is perpetually upgraded.



John Boudreau
Professor of
Management and
Organization
Marshall School of
Business at University
of Southern California

What area of the HR function will be most impacted by emerging technologies?

While there are dramatic impacts on the functional processes of HR—such as recruitment, selection, L&D, performance management, and really, the entire talent lifecycle—the very nature of how we define work is a fundamental driver of the future, shifting from systems that define workers as employees and work as jobs to systems that atomize worker capabilities (e.g., skills) and work needs (e.g., tasks and projects). Very few HR systems can truly support and teach leaders and workers to think beyond jobs and employees to embrace a more fluid and optimal system at this more atomized or “deconstructed” level.

What's the single most dramatic shift you see happening in the HR-tech space today?

The shift from traditional transactions to decision support to “experience” is well-documented, but I think that the more dramatic and fundamental shift is toward systems that “nudge” employees, managers and leaders with suggestions and guidance in the flow of their work. These systems learn from situational behaviors and then use evidence-based decision rules and algorithms to “nudge” where most effective. This takes HR tech beyond “experience” and beyond the HR function to become a more natural and constant source of learning, accountability and people optimization.

What are the most common mistakes HR organizations make in acquiring and implementing new technologies?

The most common mistakes are a failure to properly define the value proposition, thus creating confusion as to whether systems are aimed at enhancing cost efficiency, compliance, service delivery, decision support, experience enhancement, etc. All of these outcomes are legitimate, but they are sometimes mutually exclusive. Related, there is far too much attention to “return on investment,” and far too little attention to “enhancing decisions.”

HR IN THE FLOW OF WORK



Agile In HR: It Has Arrived

Agile, a design framework and set of methodologies invented for software developers, has now landed in HR. And it's transforming the HR function, our roles and our impact.

First, Some Background

In the 1980s and '90s, software development was done by huge teams, often over years.

The fascinating book *The Mythical Man-Month*, written in 1975 by Fred Brooks, a computer architect and software engineer at IBM, described how development projects at IBM got slower and slower as more people were added. After studying the problem, Brooks came to realize that small, multi-functional teams, given very limited and clear goals, could outperform large project teams. His principles focused on three fundamentals: First, the software teams had to be small so they could communicate more quickly. Second, they had to include multiple functions in one team so the team could operate independently. Finally, they needed fast communication with customers and other teams so they would not get out of sync with requirements and could iterate quickly.

Brooks' observations formed the basis of the *Agile Manifesto*, written by a group of software engineers who documented design principles to expedite software development and improve quality and responsiveness to changing customer requirements. The approach, which called for iterative development, ongoing customer collaboration and frequent releases, fundamentally changed the way software was developed and delivered.

Adapting to the Digital Temp of Business

Agile's design principles are now being used in other business areas to tackle large, complex projects. Stand-up meetings, OKRs (objectives and key results), MVPs (minimally viable products) and QBRs (quarterly business reviews) all are offshoots of agile design.

But agile is more than tools and design principles. Maarten van Beek, HR director of ING Netherlands, emphasizes that agile is really a philosophy that promotes decision-making at the level of expertise, empowering people to learn and experiment with solutions that are co-developed with customers. As part of ING's digital transformation, its HR organization used agile to redesign its processes and systems and reinvent its services to accelerate the company's new ways of working. To keep up with the business, ING's HR professionals had to move faster, be more proactive and upskill themselves to take advantage of modern tools and technologies.

By Josh Bersin/Columnist

At ING, HR professionals work in small, multi-functional HR teams on various projects. People iterate regularly at a pace that matches the “digital tempo” of the bank itself. Learning and collaboration are rewarded and encouraged, and people move from project to project throughout their HR careers.

Agile Service Delivery

Just as agile has transformed software development, so too will it transform HR. Certainly, we need to design enterprise-wide processes, but they're no good if they aren't localized and relevant to people's daily work lives. So, rather than design solutions in a conference room, we need to design them with customers, experiment enthusiastically and improve them on a continual basis.

But there's more. In HR, like software, there are two parts to solving problems. The first is designing a solution, and the second is supporting it in the market. For HR, this means creating cross-functional service roles, instrumenting and monitoring our employee solutions, and getting lots and lots of feedback so we can tweak, improve and iterate the programs we build.

I recently met an HR leader whose organization is using agile to design its performance-management process. Not only are program designers using OKRs and other agile tools, but they also have created three versions of the process to test on different employee groups. Each pilot is using different approaches to evaluation and goal setting. Essentially, the company is doing A-B testing to determine which process will work best.

Where to Get Started

Employee-onboarding design is an excellent place to put agile into practice. Onboarding and job-transition programs are essential employee experiences that cross functional boundaries, and we need to design them iteratively in partnership with the business.

Think about all the learning, performance, career and reward programs you're building. While development focus is typically scale, it is often better to develop them for speed. With agile, you can get a solution into the market, test it and improve it at light speed. This is where HR is going, and it will transform your team, your role and your whole HR function.

I'll touch on agile in HR in my keynote at the HR Technology Conference, Oct. 1-4 in Las Vegas.

Josh Bersin is an analyst, author, educator and thought leader focusing on the global talent market and the challenges and trends impacting business workforces around the world. Send questions or comments to hreletters@lrp.com.



HR Tech Conference Showcase

Below is a list of some of the exhibitors and reasons to visit their booths at the 22nd annual HR Technology Conference & Exposition®, to be held Oct. 1-4 at the Venetian in Las Vegas. For more information on the event, visit www.HRTechnologyConference.com.

Mya

BOOTH: 817



Mya is the leading conversational AI solution for hiring teams, scaling outreach and communications between candidates and recruiters at top enterprises and staffing agencies globally.

mya.com

ADP

BOOTH: 1901



Designing a better way to work through cutting-edge products, premium services and exceptional experiences that enable people to reach their full potential. HR, Talent, Time Management, Benefits and Payroll. Informed by data and designed for people.

ADP.com

Paychex

BOOTH: 1106



Paychex, Inc. (NASDAQ: PAYX) is a leading provider of integrated human capital management solutions for payroll, benefits, human resources and insurance services. By combining its innovative software-as-a-service technology and mobility platform with dedicated, personal service, Paychex empowers business owners to focus on the growth and management of their business.

paychex.com/hre

BetterUp

BOOTH: 3109



Founded in 2013, BetterUp is a mobile-based leadership-development platform used by Fortune 500 companies. Through on-demand, virtual coaching sessions, BetterUp helps employees develop new behaviors and mindsets that enable high performance.

betterup.co

ServiceNow

BOOTH: 1715



ServiceNow meets the modern workforce expectations by delivering a next-generation employee experience with intelligent workflows and effortless services, all while unlocking enterprise-wide productivity.

servicenow.com/products/hr-service-delivery.html

Businessolver

BOOTH: 2024



Businessolver is flipping the experience at HR Tech 2019. Come discover our market-changing benefits-administration technology that supports a member-first experience.

businessolver.com/hrtech2019

Ultimate

BOOTH: 1906



Ultimate Software delivers cloud human capital management solutions that help organizations personalize recruiting, simplify payroll, manage time and attendance, and support proactive, strategic talent management.

ultimatesoftware.com

CartaHR

BOOTH: 2932



CartaHR is HR document-management software that integrates with your HRIS/HCM for fast, secure, compliant access to all your employee documents.

accesscorp.com

Workday

BOOTH: 2300



A leading provider of enterprise cloud applications, Workday delivers financial management, human capital management, planning and analytics applications designed for the world's largest organizations.

workday.com

Employers are slashing healthcare costs through choice and personalization.

BY CAROL PATTON

Cost Crushers

Many employees now have someone they can turn to for healthcare matters.

Since 2017, the National Business Group on Health has noticed a 39% spike in high-touch, on-demand, healthcare concierge services among its estimated 450 members. More than half of these large employers have also integrated support services for medical decisions, says Brian Marcotte, CEO and president of NBGH, a Washington-based organization that addresses national health-policy issues and shares best practices in healthcare management.

Marcotte explains that employees “don’t touch the fragmented or complex healthcare-delivery system with enough frequency” to make independent, informed decisions. Concierge services help cut costs by explaining employee benefits and treatment options, serving as their healthcare advocate when needed and recommending appropriate healthcare providers and facilities.

“Employers have faced reality,” he says. “They’re starting to rethink, simplify and maximize the consumer or employee experience.”

Some HR executives have grown fearless in slashing healthcare costs and improving access to quality care by moving past traditional boundaries. They’re making bold changes that primarily focus on personalization and choice. From creating individualized, narrow provider panels to employees personalizing their benefit plans, the goal is to give employees the right care, at the right time, at the right place—and, now, at the right cost.

Century of Rising Costs

Despite employers’ good intentions, healthcare prices have been climbing for nearly a century—and they’re not forecasted to slow. Healthcare spending is projected to grow at an average rate of 5.5% per year for the next eight years

and reach nearly \$6 trillion by 2027, says the Centers for Medicare and Medicaid Services.

Making Headway

One strategy that’s attracting employer attention is pushing out personalized messages to workers, says Marcotte at NBGH. By using claims data and other predictive analytics, third-party vendors identify which employees are more likely to pursue surgery or specific treatments and then email them available benefits information, such as about medical-decision-support services.

“It makes sure people take advantage of their benefits and makes healthcare more affordable by steering people to high-quality, efficient providers and sites of care,” he says, adding that an employer can see big savings when employees visit an urgent-care center rather than a hospital emergency room, or an infusion center instead of a hospital for specialty-drug administration. “[Employees] are making decisions on what’s best for them and not getting surgery for the sake of surgery.”

Virtual systems are also growing in popularity, eliminating the need for employees to directly call a vendor or try to figure out a healthcare issue on their own. For instance, take employees who are searching for an orthopedic specialist. While dozens may be available in their network, Marcotte says, a virtual system automates and simplifies the selection process by identifying several high-quality and efficient specialists based on individual need and location. It helps steer employees to quality providers so they can make better decisions about where to go for care. Marcotte adds that this approach takes the mystery out of accessing a broad network that may include hundreds or even thousands of providers. Some concierge services are also taking a next step and scheduling employee appointments.

Other employers support centers of excellence that teach employees



what questions to ask providers, explain treatment options and provide recommendations for the best location for surgery. Since purchasing healthcare services is not routine for the average person, Marcotte believes these offerings are proving valuable.

So is contracting directly with healthcare providers, especially for large employers that can take advantage of their size to reduce costs. Marcotte says the number of NBGH members applying this strategy has almost quadrupled from 3% in 2018 to 11% this year.

Fewer But Better Choices

Although not as popular as other approaches, some organizations are developing narrow provider networks.

“That doesn’t mean restricting access,” says Howard Forman, a professor in the department of economics and schools of medicine, management and public health at Yale University. “Narrow panels don’t give employees as much choice but better choice by having them access providers who are as or more effective as others at lower costs.”

For example, consider a broad provider network that includes 10 orthopedic surgeons. A narrow network may only recommend three. In order for other surgeons in the broader network to be included in the narrow network, they must compete by reducing their price while delivering quality services.

Unfortunately, the adoption of narrow networks has been slow, Forman says, citing employee friction as the reason. HR professionals believe employees will complain about why they can’t access a specialist or specific hospital. Effectuating positive change isn’t easy, he says. Sometimes employers must climb a steep hill to get to the other side.

Whatever strategy is employed, Forman suggests creating employee groups to help HR change the healthcare-spending habits of all workers, not just those who spend the most healthcare dollars.

“Get them to come to the conclusion that it’s in their self-interest to have narrow panels because it will decrease their out-of-pocket costs,” he says. “Tell them, ‘We’re looking at you to help us lower long-term, out-of-pocket spending for employees by 10% to 20% without increasing employer spending. You’ll have the greatest chance of success if you pass on 100% of savings to employees during the initial years and take advantage of the savings you accrue after that.’”

Bargain Shopping

Since 2011, California Public Employees’ Retirement System (Calpers) has saved more than \$8 million a year with “reference pricing,” an approach that targets its 235,000 non-Medicare PPO members. Individuals are offered a fixed payment

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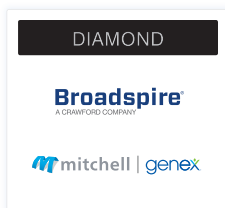
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for a range of hospital surgeries or procedures, such as hip replacement or cataract-removal surgery, which encourages them to shop around. For example, if Calpers pays \$40,000 for a hip replacement but employees choose a hospital that charges \$50,000 for the procedure, members are responsible for paying the \$10,000 difference along with a 20% copay (up to \$3,000).

Not surprisingly, members have gravitated toward lower-priced healthcare facilities. The approach also produced an unexpected benefit: Those who had a hip or knee replacement at a reference-pricing facility experienced a significantly lower general-complication rate and infection rate within 30 days of their stay, according to Calpers.

However, there are other factors to consider, such as that some fees can't be negotiated, including those provided in the emergency room. Employees must also be willing to utilize lower-priced healthcare facilities, be armed with accurate price and quality information and, lastly, develop the ability to comparison shop, which excludes workers with emotional or cognitive impairments.

Great Expectations

Looking ahead, employers can anticipate more direct-to-consumer healthcare offerings, which can also produce cost savings.

One example is 98point6, an on-demand, text-based, primary-care service. Employees nationwide

pay an introductory rate of \$20 the first year and then \$120 annually for personalized consultation, diagnosis and treatment.

"Employees might use a service like this because it's very convenient and they know exactly what it's going to cost them," says Kate Brown, leader at Mercer's Center for Healthcare Innovation in Houston. She asks, if insured employees are willing to spend their own money on such services, then why do employers need to include them in their health plan at an additional cost to the employer?

Within the next two years, she believes, employees will interact with artificial-intelligence chatbots that cut costs by triaging medical conditions, answering questions about symptoms,

informing them about available programs and benefits, and recommending appropriate healthcare providers.

Brown says these virtual concierges will be "inherently valuable." According to a recent survey conducted by Eligibility.com, 89% of respondents Google their symptoms before going to see their doctor; of those, 63% want to know how serious their symptoms are, and 32% do so because they don't have the time or money to go to the doctor's office.

"AI chatbots create a really natural and easy-to-follow process that is missing from benefits today," says Brown. "It's very prescriptive about what the employee needs to do and how they can do it."

Other companies have begun translating quality indicators into data that can be used by employees when shopping for healthcare providers. Nowadays, she says, many employers simply post healthcare-related documents like questions to ask a new doctor on their website. But AI goes much further. It can serve those same documents to employees in real time, exactly when needed, instead of relying on them to remember the information months or even years later when seeking medical services.

Over the past several years, a handful of employers have started gathering healthcare data on each employee to identify what healthcare services would be the most impactful for them and then use that data to promote specific types of benefits or programs to them.

While this personalization process is in its infancy, Brown says, companies are also exploring ways to build employee benefits on a one-to-one basis, rather than offer the same health plan to their entire workforce.

"Employees can turn coverage on or off for specific conditions based on individual needs," she says, explaining that individuals can save money by selecting benefits that reflect their age, health status and lifestyle.

Although healthcare benefits are not yet "super-personalized," Brown says, employees will push employers in the direction of choice and personalization.

Until then, she says, HR professionals can continue cutting healthcare costs by observing one key rule: "Be open to new ideas."

Send questions or comments about this story to hreletters@lrp.com.



BEYOND BENEFITS

By Kathryn Mayer/Columnist

Will Employers Help Stem Rising Costs?

Count me in as one of the many people frustrated by healthcare costs.

As an editor and reporter who has been covering the rising cost of coverage—and as an employee who personally has to deal with it—the issue has been depressing, to say the least.

Maybe it's because I was in the hospital for several days late last year for a medical emergency and I'm still getting bills I'm unsure about—making me one of the many dealing with unforeseen or surprise medical bills. Maybe it's because healthcare costs are expected to top a whopping \$15,000 per employee (!) next year, according to the National Business Group on Health. Maybe it's ludicrous prescription-drug costs. Or because research from the Integrated Benefits Institute recently found that one-third of workers go without needed care because they can't afford it.

It's not just depressing; it's unsustainable.

"It's alarming because it's [growing] faster than wages, it's higher than inflation and it's increasing at an unsustainable rate over time," says Ellen Kelsey, NBGH chief strategy officer.

While rising healthcare costs are nothing new—rates are rising 4% or 5% year over year, on average—are we finally hitting a point where we're really ready to do something, with employers leading the charge? Signs point to yes. More employers are stepping up to address the problem, realizing that employees who are dealing with stress over the high cost of care are likely to be less productive at work. From virtual care and tech solutions to centers of excellence and direct contracting, the opportunities are endless for employers trying to cut costs for their organizations and for their employees. It's a smart and necessary move. Employers are in the power position to lead the charge and to come up with strategies that not only help lower healthcare costs, but also reinvigorate their workforce.

"Employers are making investments not just for the sake of health and managing healthcare costs, but

ultimately because they fundamentally believe it's the right thing to do for the employees and their families, and it does have an impact on the overall organization," Kelsey says.

But perhaps the most exciting development is—dare I say it?—an interest in working with the government. Employers historically have been reluctant to get lawmakers involved, but it looks like things might be shifting.

For instance, according to NBGH, three-quarters of employers say they would consider backing a plan where the government negotiates a price for all payers for drugs above \$1 million, paid for from a national fund. Meanwhile, nearly half would favor national funding to underwrite part of the cost for such drugs and 35% would consider supporting shifting patients with certain high-cost conditions to Medicare. And, more than half of large employers say they support expanding Medicare to make more Americans under 65 eligible for the health-insurance coverage.

Meanwhile, more than 60 big employer groups recently sent a letter urging Congress to pass the Lower Health Care Cost Act—which essentially caps payments to out-of-network providers in the event of a surprise bill—and ultimately calling for legislation that would take aim at surprise medical bills, prescription-drug costs, healthcare transparency and other issues.

These are all positive steps.

Employer innovation is at a turning point and, with that innovation, should be an increased willingness to do whatever it takes to make a dent in healthcare costs. That just might mean getting their voices heard by lawmakers. With the presidential election just a year away, it's yet another opportunity that must be seized if we want to make serious changes.

Kathryn Mayer is HRE's benefits editor and chair of the Health & Benefits Leadership Conference. She has covered benefits for the better part of a decade, and her stories have won multiple awards. She can be reached at kmayer@lrp.com or on Twitter via @mayereditor.



Employers are turning to on-demand pay apps to help employees living paycheck to paycheck.

BY JULIE COOK RAMIREZ

Quick-service restaurants have never been known for racking up impressive retention rates. Often viewed as a temporary pit stop or stepping stone for workers, jobs are typically filled by high school and college students, retirees and people returning to the workforce after an absence. While the overall turnover rate in the restaurants and accommodations sector was 74.9% in 2018, according to the Bureau of Labor Statistics, QSR turnover averaged 150% that same year, as reported by Bloomberg.

At Church's Chicken, Senior Vice President and Global Chief People Officer Karen Viera is operating under no delusions when it comes to the transient nature of the industry's workforce and the difficulties in retaining employees.

"Wages in our industry are approximately the same from one restaurant to another, which means we have to bring value to the working relationship in other ways," Viera says.

For her, that means paying close attention to employee concerns—both workplace-related and otherwise. In recent years, she's become aware of an increasing number of store-level employees experiencing cash-flow problems. The situation was so dire that some turned to HR to request pay advances, while others had come to rely

on high-interest payday loans to cover unforeseen expenses.

While the payday-lending industry has flourished due to the sheer number of people living paycheck to paycheck, Viera didn't want Church's valued employees to be hit with exorbitant fees simply to pay for an unexpected car repair, medical bill or "any number of real-life situations." She began looking for solutions that would provide flexibility with regard to when team members receive their earned wages, but at no cost to the workforce.

Viera was drawn to the concept of on-demand pay, which is quickly gathering steam, particularly among organizations that employ large numbers of low-wage, entry-level workers. Partnering with Instant Financial, Church's launched the "Work Today-Get Paid Tomorrow" program, allowing restaurant-level employees to access up to half of their earned pay in advance of their official payday. Workers submit their request via mobile app during certain hours, and the wages are transferred onto their pay card the next day, immediately available to be used however the employee sees fit.

"Church's is stepping out in front to serve our team members and find solutions that better serve our hard-working employees," says Viera. "This program demonstrates our commitment to our employees by being forward thinkers and leveraging technology to bring convenience, which adds value."

All hourly restaurant employees are eligible to participate in the program, which launched as a pilot at one Church's Chicken restaurant in Montgomery, Ala., in June. Response was overwhelmingly positive, with 75% of eligible employees signing up to participate. Currently, Church's is in the process of rolling out the program to its six other company-owned Alabama locations, then will continue the rollout to the rest of its 160 company-owned locations. While she can't require the owners of Church's more than 800 franchise locations to adopt on-demand pay, Viera says, one of Church's largest franchisees is already moving forward with plans to implement the program. She expects others will follow suit.

Driving Demand

Church's hourly workers are certainly not alone in their financial struggles. Nearly 80% of American workers say they're living paycheck to paycheck, according to a 2017 report by CareerBuilder. While there's a slight variation between genders—81% of women, compared to 75% of men—across the board, the vast majority of American workers would be in a financial bind if an unexpected expense were to arise.

While it's been suggested that younger workers are driving the trend toward on-demand pay, concern over a lack of savings spans the generations. According to PwC's *8th annual Employee Financial Wellness Survey*, issued in June, the top financial concern of "Not having enough emergency saving for unexpected expenses" was cited by 62% of millennials, 55% of Gen Xers and 44% of baby boomers.

A much bigger driver is the emergence of the gig economy, in which workers routinely cash out at the end of their shift, says Maggie Deptuck, global senior vice president and general manager of small business and mid-market at Replicon. As traditional employers compete with companies hiring gig workers, they are increasingly encountering the expectation of immediate—or near-immediate—pay.

At the same time, Deptuck says, the proliferation of online retailers like Amazon, Zappo's and others has raised the bar when it comes to immediate gratification. Couple that with workplace changes that have restructured once-annual events into everyday, ongoing processes, and you've got a new set of expectations that is driving the move toward on-demand pay.

"There is such a sense of immediacy in everything we do in our lives, and that is bleeding over into the workplace," says Lisa Sterling, chief people and culture officer at Ceridian HCM Inc. "It started with the conversation around moving from annual performance reviews to something that was much more real time. People are now expecting that

HR Leadership

same type of thing with regard to their compensation and pay.”

For Checkers & Rally's Restaurants Inc., it's all about giving their 4,500 restaurant employees the same kind of “crazy good experience” they pride themselves on delivering to customers, according to Marna Killian, senior vice president of people. She learned

of the on-demand-pay concept at a 2017 National Restaurant Association conference and was immediately sold on the idea. In January 2018, the drive-thru chain began piloting Instant Pay to about 800 employees in 40 restaurants throughout the Tampa market. Of the 93% of employees who had opted for a pay card rather than direct deposit, 66%

took advantage of the program, which enables them to receive up to half of their pay the day after they've earned it, without any fees.

Having deemed the pilot successful, Killian and her team took Instant Pay to Orlando, Jacksonville and southern Florida, before heading to the Midwest. By the end of July 2019, the system-

wide rollout was complete, and Killian introduced the concept to franchisees at the chain's national convention in September.

Safety Net

Before Checkers & Rally's launched its program, Killian held a series of focus groups with the employees it would be impacting, several of whom expressed trepidation around their ability to control their spending when they didn't have to wait until payday to have money in their pockets.

While Checkers & Rally's doesn't limit how employees can use the money they access via Instant Pay, it promotes the service as being intended to cover emergency expenses, which, Killian says, is largely how it's being used.

In its pilot, Church's Chicken employees were found to be using the service for more than just emergency expenses, but that doesn't concern Viera in the least. “That's completely fine because they've earned the money,” she explains.

Critics, however, say on-demand pay may tempt workers to spend money on dining or entertainment instead of saving for long-term purchases like a house.

“That requires self-control and budgeting,” says Jennifer Loftus, national director of Astron Solutions, “and these apps could cause some individuals to lose the opportunity to develop those skills.”

When Walmart Inc. partnered with Even Responsible Finance and PayActiv to roll out a suite of financial-wellness services, including an on-demand-pay option, to its 1.4 million U.S.-based associates 18 months ago, the intention was that it serve as a “safety net for emergencies,” according to David Hoke, senior director of health and wellness. With that in mind, the mega-chain foots the bill for associates to use Instapay up to eight times per year to access up to 50% of their earned wages. If they feel the need to use it more often, it will cost the employee \$6 per month.

Using the Even app, Walmart associates can plan ahead for bills and savings goals and see exactly how much money they're OK to spend after anticipated expenses are subtracted from their anticipated cash inflows. CEO Jon Schlossberg says this kind of holistic approach can truly help workers free themselves from living paycheck to paycheck.

“Any HR executive who thinks on-demand pay by itself is going to help their people escape the paycheck-to-paycheck cycle is significantly misguided,” says Schlossberg. “If used correctly, it can be a critical part of your ability to help your employees become financially healthy but, if it's the only thing you provide, you might actually make someone's situation worse.”

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Executive Onboarding, Upgraded

Setting up newly hired leaders for success is critical for the bottom line.

BY MAURA C. CICCARELLI

Are new executive hires being set up for success? Not always, apparently. A majority of North American executives reported that they received no formal onboarding for their new roles, according to a survey released earlier this year by BlueSteps, the career-management service of the Association of Executive Search and Leadership Consultants.

The survey also found executives in the U.S. are 35% less likely to receive formal onboarding compared to the global average. When grading onboarding experiences on a scale of 1 to 100, executives in the U.S. rate theirs as mediocre, with an average score of 59.

While improving employee onboarding has been a popular topic in recent years, this research reminds us

that there's a performance-preparation gap in priority setting, work-culture acclimatization and relationship building that could have a serious effect on a company's bottom line, says Karen Greenbaum, president and CEO of AESC.

"Organizations put so much effort into finding, assessing and convincing the top candidate to join their firm," she says. "It's quite remarkable how little time many spend on ensuring the successful candidate is able to integrate into the organization and hit the ground running. A successful onboarding program can ensure that the executive not only joins but has a long-term, successful, high-impact career."

The problem, of course, is not new, even though some companies tackle it better than others. A 2018 survey of 400 CEOs conducted by the international leadership-advisory firm

Egon Zehnder found that only 38% of external executive hires and 28% of internal executive hires felt they were fully prepared for their new roles.

"These roles are unfolding in a world that has become more complex," says Lena Triantogiannis, partner in Egon Zehnder's Athens office and co-leader of the firm's global integration practice. "Newly appointed leaders are finding themselves having to step into organizations and roles that are quite demanding and challenging."

That's why adequately integrating new-leader hires into an organization is critical for making good decisions faster, adds Mark Byford, partner in Egon Zehnder's London office and co-leader of the firm's global integration practice.

"I think this is about value missed or value seized," he says. "Frankly, giving someone a telephone directory and an office, a chair and a computer doesn't really do that."

"We've created the wrong expectation about what onboarding is," adds Brent Heslop, partner and head of global M&A business transformation for Mercer. "Most people's experience as an employee is, 'I sit in a room and somebody drones on and on for 45 minutes about benefits and then drones on and on for two hours about compliance and then drones on [for] 30 minutes about vague descriptions of our values.' We just don't see a lot of value in it. Nobody wants to distract a senior executive from just getting on with their work."

According to the surveys, newly hired executives clearly want support. While each organization is different, an effective executive-onboarding program includes several vital elements: clear performance expectations that are rooted in strategic priorities, helpful operational overviews, realistic descriptions of the company's culture and how decisions are made, stakeholder "maps," coaching and more.

"Let's fine-tune what they need to learn and then get them up that curve as fast as we can," Heslop urges. "When we have that perspective, there's less reluctance [to develop an executive-onboarding program]."

Implementing the onboarding process involves a lot of conversations with the CEO or hiring manager, HR and outside coaches, if necessary, he says. Good execs build their networks and relationships throughout the onboarding process, so simply handing over an onboarding manual to the new hire is unlikely to be valued or effective.

Onboarding 2.0

What would executives like more of in their onboarding programs? The AESC research revealed respondents are seeking information on:

- the company's goals and vision (20%);

Talent Management

- internal processes, to learn how the organization functions (14%);
- team culture (10%);
- IT training (9%); and
- an introductory meeting with other teams and offices (8%).

Greenbaum recommends a structured onboarding process that is customized for each role in the company.

"This includes an in-depth 90-day plan focused on culture immersion, engaging with the leadership team and employees at large, and an in-depth review of strategic and key tactical plans," she says. "During the first 12 months, periodic check-ins are valuable, and a 360 process that provides meaningful feedback should be built in." That should include other leaders or board members identifying red (or yellow) flags regarding the executive's work and a plan for corrective action, she adds.

This approach can be managed internally or with the help of outside executive coaches, but the underlying message is about the depth of the information being shared with the new hire.

"You've got to be willing to tell the truth about how things really work around here," says Heslop. "Not how they show up on paper but how they *really* work because [not knowing that is] what keeps executives from getting better faster. It's understanding the informal, unspoken and unwritten rules, as opposed to the things that they got told during their recruiting process. They may have uncovered some of those [already], but those are the ones that are going to really make them either more effective faster or trip them up."

Who can tell these truths? Often, it's a peer mentor whose selection rises organically, as opposed to through the "onboarding-buddy" programs usually assigned to lower-level employees. "It is much more clandestine and informal," says Marie Holmstrom, senior director of the talent and rewards line of business for Willis Towers Watson. "It's more like advice from a peer who says, 'You should get to know John because he joined the organization six months ago and will have a really good perspective on this.'"

Ignoring "the way things work around here" can be a common mistake of new executives who aren't supported by a good onboarding program, Heslop says. "They do so at their peril because, if you think you can come in from outside and simply know better and not accept the status quo, you're just making your job harder for yourself."

It's important for companies to start the onboarding plan-development process before the hired exec even walks in the door, says Holmstrom, as this is when you can most properly document the new leader's talents, personality and style observed during

Executives in the U.S. are 35% less likely to receive formal onboarding compared to the global average.

When grading onboarding experiences on a scale of 1 to 100, executives in the U.S. rate theirs as mediocre, with an average score of 59.

A 2018 survey of 400 CEOs conducted by the international leadership-advisory firm Egon Zehnder found that only 38% of external executive hires and 28% of internal executive hires felt they were fully prepared for their new roles.

the interviewing process. This creates a "memory" of why the person was hired in the first place. Typical questions include:

- What are the attributes of this candidate that are so needed for the role and the organization today?
- Where might this executive have challenges coming into the organization because of his or her past experiences, track record, personality or leadership style?
- What support can the organization provide to maximize success and minimize failure, based on these attributes?

"Getting the CEO or the hiring manager to really articulate that from the beginning helps to avoid things that could come back 30, 60 [or] 90 days into the new [hire's tenure]," says Holmstrom. "We forget. We have all this promise around a new hire, but we know that everybody has to make a transition and acclimate. Organizations tend to have fairly strong cultures and expected ways of working together. Some candidates may have more transition steps that are needed to acculturate to that new work environment."

"If we review [these factors] with the new hire in advance of their coming in the door, then we set them up for success," she adds.

Holmstrom recommends determining expectations for the new hire's 30-, 60- and 90-day marks involving topics like meeting the top-five strategic priorities, managing the mandate for change, developing relationships with key stakeholders and identifying strategic partners. Reviewing the plan periodically helps focus attention on the true priorities,

rather than continually bombarding the new hire with information and regular fire drills that distract from the goals.

An impartial third party, such as an executive coach, can facilitate reflection back on the original mandate of the role and gives the executive an objective sounding board.

"I found it's really helpful to have that onboarding coach be able to say to the executive, 'What you're going through is normal—these questions you're asking, this concern that you're not making an impact fast enough or these competing priorities that are coming at you,'" Holmstrom says.

The coach can also help the CEO reposition the challenges for the new leader and set new messaging, if course correction or pivoting is necessary.

As part of the 90-day check-in, Holmstrom recommends the third-party coach—or CEO or HR leader, depending on the company—conducts brief interviews with each of the stakeholders, direct reports, the hiring manager and peers about the key areas the executive was prompted to focus on when coming into the role. Questions can include how well the executive is building relationships, adapting to the culture and bringing in new ideas, as well as opportunities for increased success. A written summary of these answers provides everyone with a real understanding of the individual's performance, transition and success.

"It's a really good checkpoint to see how the individual is doing," Holmstrom says.

Opportunities and Challenges

Strategic executive onboarding can also be critical during mergers and

acquisitions; yet, it's a step that many companies ignore, to their later regret, says Mercer's Heslop.

He praised one company for making a concerted effort to engage senior leaders and onboard the tier beneath them to have the focus on onboarding cascade through the entire organization. "It's an exceptionally intense investment in making sure that they're doing a good job of onboarding and actually engaging leaders," he says.

With M&A, in particular, articulating how the acquired company's executives are going to work with the parent company's leaders, and vice versa, is a vital component of the process.

Replacement execs are often hired due to an incumbent's poor performance in meeting strategic goals, says Egon Zehnder's Byford. Although companies may feel pressured to get someone quickly, the situation with the previous exec should serve as a reminder to provide the new hire with good grounding.

All executive onboarding should include helping them understand the company's stakeholders and the organization's culture, says Egon Zehnder's Triantogiannis, adding that other elements depend on the individual position. "In roles where somebody has a higher degree of international visibility, deciding on where [they're] going to show up, when and in what sequence is a detail that becomes very important."

Byford cited the case of a newly hired global pharmaceutical executive who had a color-coded chart showing which sites he was going to visit over the course of about six months. One recently acquired large operation was on the calendar for a visit three months out. That schedule was sending a signal—and it wasn't a good one.

"It was not hard for him to reorient [his schedule and] put it near the front. Then, the signaling was quite the opposite," says Byford.

These are good arguments for paying attention to both the big picture and the finer details in the onboarding process, says Holmstrom.

A final factor bolstered by the onboarding process is probably the most critical and, yet, often-forgotten element of a successful transition: setting very clear expectations for the new hire, a subtle element that can be easy to gloss over.

"The new executive is probably going to want to make an impact very, very quickly," Holmstrom notes. "This is a major transition for the executive, especially if it involves a relocation or a change in industry or sector. These things add to the overall transition challenge. There needs to be patience on both sides with that process."

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Below is a listing of products, services and solutions for human resource executives and their organizations. To receive more information, please contact them directly.



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BetterUp is a mobile-based leadership-development platform that uses a holistic, science-backed methodology to develop new behaviors and mindsets that enable high performance. Through on-demand, virtual coaching, users practice and reinforce new behaviors and skills, with individual growth tracked. With a diverse range of customers, including Genentech, Logitech and Workday, BetterUp inspires employees to build the skills to thrive personally and professionally. To learn more, visit www.betterup.co.



Founded in 1998 by HR professionals, Businessolver delivers market-changing employee-benefits-administration software and services. The company's award-winning SaaS-based technology enables employers to maximize their benefits program investment, minimize risk exposure, and engage employees with easy-to-use solutions and communication tools to assist them in making wise and cost-efficient benefits selections. www.businesssolver.com



Mya leverages proprietary natural language processing and machine-learning techniques to automate outreach and communications with job seekers throughout the end-to-end candidate and employee lifecycle. The solution helps hiring teams scale their sourcing efforts, screen and shortlist large applicant pools, automate the scheduling process and provide ongoing guidance to candidates. <https://mya.com>



Aon is a leading global professional-services firm focused on delivering client success through a portfolio of solutions across risk, retirement and health, designed to empower economic and human possibilities. We develop data-driven insights to help clients reduce volatility and improve performance in an increasingly uncertain and complex world. www.aon.com/humancapital



With more than 30 years of experience, Hogan Assessments (Tulsa, Okla.) is the global leader in providing comprehensive, research-based personality assessment and consulting. Grounded in decades of research, Hogan's assessment solutions help businesses dramatically reduce turnover and increase productivity by hiring the right people, developing key talent and evaluating leadership potential. www.hoganassessments.com



Paychex makes payroll, benefits, HR and insurance easy and automatic. Online or mobile. In person or over the phone. We work the way you want to work. And we do it every day for more than 650,000 clients. Above all else—more than any other company—Paychex makes it simple. www.paychex.com



Meet the modern workforce expectations by delivering a next-generation employee experience with intelligent workflows and effortless services, all while unlocking enterprise-wide productivity. ServiceNow makes it easy for employees to get the services they need. Santa Clara, Calif. www.servicenow.com/products/hr-service-delivery.html



As the trusted provider of on-demand e-learning courses for mid-market and Global 2000 companies, OpenSesame delivers the most flexible buying options to maximize your budget. OpenSesame is compatible with every LMS and has the broadest catalog, with 20,000-plus courses from the world's leading publishers, updated constantly. www.opensesame.com



Ultimate Software's cloud-based UltiPro helps simplify work experiences for all employees. With UltiPro, you deliver personalized talent-acquisition experiences, guide employees through important benefits choices, simplify payroll computations, manage time and attendance, and support continuous and proactive talent management. HR and payroll professionals leverage UltiPro to drive smarter, people-focused decisions. www.UltimateSoftware.com

Marketplace



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CartaHR is a document-management solution that helps HR save time and money by securely creating, storing and retrieving employee documents. CartaHR's AI learns your document types for quicker access, and workflows and compliance monitors reduce administrative tasks and risk. CartaHR integrates with HR technology solutions to become the central repository for all employee documents. www.accesscorp.com



Paychex is a leading provider of integrated human capital management solutions for payroll, benefits, human resources and insurance services. Learn more about Paychex by visiting www.paychex.com.



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People

Compiled by Jen Colletta

Health and wellness company *Surterra Wellness* appointed **Stevens J. Sainte-Rose** as chief HR officer. He will lead the company's global HR function and execute all facets of the HR strategy to support the organization's overall growth.



Sainte-Rose has more than 20 years of experience in international HR leadership, most recently as chief HR and transformation officer at Dawn Foods Global and previously as CHRO and senior vice president at Walgreens. He spent a decade in varying HR-leadership positions in international divisions of the Coca-Cola Co., and, earlier in his career, worked in HR at Aramark Corp., Pier 1 Imports, Burger King Corp. and Millennium Broadway Hotel.

Sainte-Rose has a bachelor's degree in industrial and labor relations from Cornell University and a master's degree in organizational development from the University of Pennsylvania.

Global restaurant chain *Domino's Pizza* has appointed **Lisa V. Price** as its executive vice president and chief human resources officer.

Price has 25 years of HR experience, including at Starbucks Coffee Co. and Nordstrom, where she most recently served as senior vice president of HR.

She earned a bachelor's degree from Occidental College and a master's degree in organization design from American University.

Enterprise cloud-data-management company *Informatica* hired **Erin Andre** as its senior vice president and CHRO. Andre will focus on fostering the company's culture of innovation, accelerating global hiring and retention, spearheading diversity and inclusion initiatives, and enhancing employee experience.



She has more than 30 years of HR experience. Most recently, she was chief people officer at nonprofit scientific-research institute SRI International. Previously, she served as CHRO at Convergys Corp., senior vice president of HR at ABM and a senior HR leader at both National Energy and Gas Transmission and PG&E Corp.

One of the nation's largest multistate cannabis operators, *Cresco Labs Inc.*, announced recently that **Angie Demchenko** will be its first chief people officer. She will oversee all aspects of the HR function, including performance management, recruitment, compensation and employee benefits.

Demchenko comes to the position from Starwood Retail Partners, a leading operator of shopping malls and lifestyle centers, where she was vice president and head of human resources. Previously, she was vice president of HR for shopping-mall owner General Growth Properties and senior vice president of HR for Jones Lang LaSalle, a Fortune 500 commercial-real-estate firm. She began her HR career at Accenture.



Demchenko has a bachelor's degree in business administration with a concentration in HR management from the University of Western Ontario.

Wayne Rustin has been named CHRO and legal counsel for labor relations at *Mohawk Valley Health System* in Utica, N.Y. Rustin joined MVHS last year as an assistant vice president of HR and spent time earlier this year as the acting CHRO before being offered the position on a permanent basis.



Rustin has several decades of HR experience, including in leadership roles at St. Vincent's Health Services,

Comcast, IBM, J.C. Penney Co. Inc. and the city of New York. He has also served as a trial attorney for the National Labor Relations Board; a municipal court judge for Fort Worth, Texas; and an adjunct professor at the University of Dallas.

Rustin earned a law degree from Howard University School of Law and a master of laws degree from Georgetown University.

CKE Restaurant Holdings Inc., the parent company of Carl's Jr. and Hardee's, recently hired **Andrew Robinson** as its CHRO.



Robinson comes to the company from Starr Restaurants, a collection of award-winning boutique restaurants where, as chief people officer, Robinson focused on driving company growth by building organizational capabilities. Previously, he was chief people and culture officer at Carlson Restaurants Worldwide, the parent company of TGI Fridays Inc. He has also held HR-leadership positions at Lifetime Fitness and The Limited.

Robinson earned a bachelor's degree in accounting from Howard University and a master's of business administration from the University of the District of Columbia.

50,400

The number of jobs added in July in the health and social-assistance categories, the fastest-growing sectors. Overall, 164,000 nonfarm jobs were added that month.

Source: U.S. Bureau of Labor Statistics



56%

Percentage of HR professionals who consider the "liquid workforce" to be a mixed blessing, bringing both advantages and disadvantages to a company.

Source: Sense

22%

Percentage of surveyed organizations that report using "employee-movement" data to track how and where employees spend their time at work.

Source: Gartner

\$150,000

The amount a 65-year-old woman retiring this year is expected to need to cover healthcare in retirement, compared to \$135,000 for a man of the same age.

Source: Fidelity



59%

Percentage of U.S. companies that are using a flexible workforce, including remote and freelance workers, to some degree.

Source: Forbes



\$15,375

The amount per-employee healthcare—including premiums and out-of-pocket costs for employees and dependents—is expected to cost by 2020, a 5% jump from this year.

Source: National Business Group on Health

27%

Almost one-third of surveyed employees say they would upgrade workplace technology if they held a position of power.

Source: Resume Lab

4.4%

When employees were given the ability to "work from anywhere," they were this percentage more productive than colleagues working under a more traditional remote-work policy, in which they had to live near the office.

Source: Harvard Business School/Northeastern University

87%

Percentage of HR leaders surveyed who agree that HR technology has strengthened their contribution to corporate success, up from 75% in 2018.

Source: Paychex



72%

Percentage of employees who admit worrying about personal finances while at work, nearly a third of whom do so more than once a week.

Source: John Hancock



A person with a backpack is walking across a suspension bridge made of gold coins. The bridge spans a deep chasm with steep, rocky cliffs on either side. The sky is blue with some clouds. The overall theme is about navigating challenges through data and technology.

Let our **DATA REVEAL** the path **FORWARD**

The continued rise of healthcare costs can be a formidable obstacle on the journey to an effective health and benefits strategy. But what if you had access to expertise that made it easier to navigate to safer financial ground? Aon harnesses the power of data and technology to provide solutions and strategies that can put you on the path to better managing your healthcare costs.

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