

CHRO Quarterly

A Magazine for Chief Human Resources Officers
and Their Teams

The Future of Work

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Driving Digital Initiatives

Addressing digitalization is the top priority for heads of HR in 2018.

94% of CHROs plan to **digitalize the HR function** within the next 3 years.

The average CHRO has **5 active digital initiatives**.

Top 3 Digital Initiatives for HR Leaders

- 1** 77% are using digital technology to **improve HR operations and services**.
This includes:
 - Using digital capabilities to extend recruitment reach (61%), and
 - Scanning external networks to monitor the employee brand (36%).
- 2** 60% are using digital technology to **enhance the employee experience**.
This includes:
 - Implementing microlearning platforms (54%), and
 - Using collaborative technology to promote cross-team knowledge sharing (54%).
- 3** 53% are using digital technology to **increase employee productivity**.
This includes:
 - Embedding analytics into employee workflows (44%), and
 - Automating routine tasks (33%).

Commonly Cited Barriers to Digital Initiatives

-  Poor existing IT infrastructure (42%)
-  Insufficient funding (40%)
-  Competing organizational priorities (36%)
-  Scarcity of digital talent (26%)

Is your organization ready for digitalization?

Visit our website or contact your account manager to register for one of our upcoming meetings.

“We are disrupting ourselves; we’re not trying to preserve a model of yesterday.”

Mary Barra
CEO
General Motors

Preparing for the Future of Work

By **Brian Kropp**

Our world is rapidly and inexorably changing. Organizations around the globe are racing to embrace digitalization, increase their workforce diversity, and develop innovative changes to their business model more quickly than their competitors. As these trends increasingly change how organizations operate, anxiety has increased among executives who are expected to present a comprehensive plan to address them. Many of these leaders do not feel prepared to face the looming threat of disruption and thrive in today’s changing work landscape.

In this issue, we try to alleviate some of this anxiety by getting to the heart of several key issues related to the future of work. Our article, “4 CEO and CHRO Debates on the Future of Work” (p. 7) highlights differences in how CEOs and CHROs think about and prioritize the trends that affect executives most. We also have a fantastic interview with Angie Freeman, CHRO at C.H. Robinson, who discusses digitalization and taking an agile HR approach in her company to adapt to changing work landscapes.

Two articles this quarter reconsider HR’s traditional role in enabling organizational growth: The first (p. 15) teaches CHROs how to equip the CEO to discuss organizational culture on earnings calls. The second (p. 22) discusses what the CHRO needs to know to partner effectively with the CFO in creating efficient growth.

We also share an excellent interview with Hein Knaapen from ING Group. Hein goes in depth about his organization’s “Think Forward” strategy to shift employee expectations and lead in a changing world.

To fully prepare for the future of work, HR executives must stay ahead of the curve. Progressive leaders must engage with their workforce to think through how trends affect the nature of work inside and outside their organizations — and they must maintain that engagement as the pace of change continues. Only with that context can they successfully navigate a path through their future.

In the News

Intel Foundation Invests \$1 Million to Train Refugees for Tech Roles

By Staff

The Intel Foundation has made a \$1 million grant to the International Rescue Committee to retrain 1,000 refugees in Germany for jobs in the tech sector through a program called Project CORE (Creating Opportunities for Refugee Employment). Ben Paynter of Fast Company reports:¹

In general, the training program will have several tracks that allow trainees to first gain the sort of basic skills they may need to gain entry-level jobs (and immediate income) in data entry, programming, and IT work. Then, many will hopefully move on to advance their education through other services that will be offered....

Trainees won't necessarily be limited to just Germany-based jobs either. Having strong computer skills means that refugees who have other commitments at home or need flexible hours can join international companies or the gig economy.

Germany has taken in more than 1.5 million refugees from war-torn countries such as Syria, Iraq, and Afghanistan since 2015. The lack of stable work for these refugees, many of whom are young men, has contributed to high levels of unemployment in the refugee community as well as a relatively high violent crime rate. If it proves successful, Project CORE could go a long way toward improving quality of life for Germany's refugees and their families, in addition to helping address the talent shortage in the European tech sector.

Intel, which has run similar programs for disadvantaged children in Las Vegas and India, is not the first company to launch a corporate social responsibility initiative geared toward employing refugees. Last year, some American companies, including Starbucks and Chobani, publicly committed to hire large numbers of refugees. These commitments were a pointed rebuke to President Donald Trump's desire to curb US admission of refugees, asylum seekers, and other immigrants.²

Other tech companies have recently announced major expansions of their digital training initiatives in Europe, with a focus on reaching groups with limited access to technology, such as the elderly, the young, and refugees.³ The primary goals of these efforts are increasing community engagement and improving relations with European governments.

Efforts like this are valuable as the tech sector faces increasing regulatory scrutiny from the EU; in addition, they will help these companies build new talent pipelines to feed their growing need for skilled workers.

¹ Ben Paynter, "The Intel Foundation Is Betting It Can Transform Refugees into Tech Workers," Fast Company, 12 February 2018, <https://www.fastcompany.com/40529447/the-intel-foundation-is-betting-it-can-transform-refugees-into-tech-workers>.

² Learn more in our Talent Daily article, "For Chobani, 'HR as PR' Pays Dividends in Earned Media."

³ Learn more in our Talent Daily article, "Facebook, Apple Expand Digital Training Initiatives in Europe."

Project CORE could go a long way toward improving quality of life for Germany's refugees and their families, in addition to helping address the talent shortage in the European tech sector.

Gartner's Peter Sondergaard on Technology's Future in the Workplace

By Staff

The 2018 World Economic Forum, recently concluded in Davos, Switzerland, brought together political, business, and cultural leaders from around the world to discuss the future of the global economy and its foremost institutions. Gartner EVP Peter Sondergaard was on hand to take in the events and speak with influencers at the forum, where he observed a few key themes in discussions of the workplace's future:

- The increasingly digital nature of business
- The rise of artificial intelligence (AI)
- The impact technology can have on improving diversity and inclusion



“It became abundantly clear that organizations have reached the point at which the digital workplace must be driven by both CIOs and heads of HR,” Sondergaard explained.¹ This doesn’t mean technology will eliminate the need for people, just that employees will need to work in different ways and companies will need to offer guidance on how to do that. “Such changes will require new models of learning and development,” he continued, “as well as the creation of hybrid workplaces that combine technology and information to accommodate a mix of employees.”

Certainly, we have seen a wide range of technologies promising to reshape how people and processes operate in the workplace, but AI is the driving force behind the most groundbreaking offerings. It’s powering Google Jobs, wearable technology, analytical tools, voice-activated technology such as Amazon’s Alexa, and the automation of processes from candidate sourcing to performance management. As a result, demand for AI talent has skyrocketed as technology providers scramble to keep up with the rapid rate of change.

While the rise of AI has fueled fears of a massive loss of jobs, Sondergaard is confident AI should ultimately create jobs if deployed properly. “As was true of the Industrial Revolution,” he pointed out, “technological advances as a result of AI will spur job creation. In 2020, AI will create 2.3 million jobs while eliminating 1.8 million — a net growth of half a million new positions. Organizations will realize an added benefit, as in 2021 AI augmentation will generate \$2.9 trillion of business value and save 6.2 billion hours of worker productivity.”²

In addition to a principled implementation of AI, the key for businesses to achieve long-term labor market stability is going to be how readily they provide upskilling opportunities for workers at risk of being displaced by technology. Tech giants such as Google, Microsoft, and Amazon have all made efforts to become part of the solution.³ In addition, the rise of online and microcredential education programs means workers won’t need to invest in expensive college or post-graduate degrees to keep up with future talent needs.^{4,5}

Governments must also play a role here, either by incentivizing companies to launch these kinds of initiatives and apprenticeships or by reforming publicly funded education offerings.

“One thing is clear: We need much earlier to educate children on how to read and interpret data and the potential bias of code,” Sondergaard said. “For example, students today are taught to read literature from various perspectives. In the

future, schools would teach children to view data and code via different lenses.”⁶

AI also has potential to aid in corporate diversity efforts by curbing the biases that inevitably arise in a hiring process managed by people. “Pushing for more diversity and inclusion is not just a responsibility; it makes good business sense,” Sondergaard added. “These successes have been proven time and time again. Yet we still lack the diversity and inclusion required for the new digital era, which is expected to be more female and more ethnically and racially diverse.”⁷

While AI and the solutions coming to market seem like attractive offerings for companies struggling with diversity, they have many potential landmines. One possible pitfall is simply programming your existing bias into AI-driven candidate selection or employee promotion processes.⁸ Our research team has also been looking into the challenge of algorithmic bias; our position is that the burden of removing this bias is on the people developing the technology, not the end users or the recruiting team.

Nevertheless, the advent of these new technologies and the unparalleled pace of digital change has shaken and will continue to disrupt how businesses work.

“As was true of the Industrial Revolution, technological advances as a result of AI will spur job creation. In 2020, AI will create 2.3 million jobs while eliminating 1.8 million — a net growth of half a million new positions.”

¹ Peter Sondergaard, “Davos Discussions on the Future of Work and Digital Business Progress,” Gartner, 24 January 2018, <https://blogs.gartner.com/peter-sondergaard/davos-discussions-on-the-future-of-work-and-digital-business-progress/>.

² Peter Sondergaard, “Davos Discussions: Taking Stock of AI,” Gartner, 25 January 2018, <https://blogs.gartner.com/peter-sondergaard/davos-discussions-taking-stock-of-ai/>.

³ Jon Marcus, “Impatient with Colleges, Employers Design Their Own Courses,” Wired, 18 December 2017, <https://www.wired.com/story/impatient-with-colleges-employers-design-their-own-courses/>.

⁴ Business Wire, “Apple Co-founder Steve Wozniak Forms ‘Woz U’ to Reprogram Tech Education, Address Skills Gap,” 13 October 2017, <https://www.businesswire.com/news/home/20171013005008/en>.

⁵ Ave Rio, “Making a Big Deal Out of Nanodegrees,” Chief Learning Officer, 6 December 2017, <http://www.clomedia.com/2017/12/06/making-big-deal-nanodegrees/>.

⁶ Sondergaard, “Davos Discussions: Taking Stock.”

⁷ Peter Sondergaard, “Davos Discussions: Technology’s Role in Diversity and Inclusion,” Gartner, 27 January 2018, <https://blogs.gartner.com/peter-sondergaard/davos-discussions-technologys-role-in-diversity-and-inclusion/>.

⁸ Simon Chandler, “The AI Chatbot Will Hire You Now,” Wired, 13 September 2017, <https://www.wired.com/story/the-ai-chatbot-will-hire-you-now/>.

By **Andrew Bladen** and **Lori Lipe**

4 CEO and CHRO Debates on the Future of Work

Learn where thinking diverges between executives and how CHROs and CEOs can work together in the digital age to bridge these gaps.

More than ever, CHROs are hyperaware that the work landscape is changing:

- New technologies and automation are upending traditional ways of working and quickly threatening entire segments of the labor market with redundancy.
- Digitalization is energizing customers and employees alike.
- Competition for critical skills and talent is increasing the need for education investment.

This general disruption and upheaval of work has brought CEOs to the center of an HR conversation like never before. However, CHROs and CEOs are often isolated in their decisions and business considerations; as a result, they may diverge from one another in how they digest these disruptions and prepare for change.

Insights from our benchmark report, “CEO 20 Pulse on the Future of Work,” reveal how over 30 CEOs in various industries are approaching future-changing trends and how over 150 CHROs match up to their thinking. To avoid blind spots and potential tension in the boardroom, we have highlighted four particularly contentious debates between CEOs and CHROs.

Debate 1: Threat of Automation

The growing availability of automation technologies uncovers new approaches to organizational change and drives different ways of working, but the potential to wipe out jobs and threaten millions of workers’ career paths is unavoidable. Our benchmark research finds organizations face a 14% workforce automation risk over the next three years. And we predict that while 2.3 million net new jobs will emerge as a result of new technologies by 2020, 1.8 million existing jobs could be wiped out.¹

The threat of automation has permeated the walls of the boardroom and raised concerns among executives. CEOs and CHROs certainly agree in their anxiety about the threat to come: only 7% of CEOs and 17% of CHROs believe their organizations have no need for a strategy to address automation risks. However, each executive evaluates the sufficiency of the organization’s strategy differently:

- One-third of CEOs surveyed find their organization has a business need to address automation risk but do not believe their organization has a strategy in place to address this risk. Only 20% of CEOs think their organizations’ current strategies are sufficient to address concerns.
- Heads of HR are even less confident: only 10% of CHROs surveyed report having an organizational strategy that sufficiently deals with potential automation risks (figure 1).

Figure 1: Agreement That Organizational Strategy Sufficiently Addresses the Potential Impact of Automation

Percentage of Respondents



n = 30 CEOs; 153 CHROs.

Source: CEB 2017 CEO 20 Pulse on the Future of Work.

“The fourth industrial revolution will impact every sphere of our business — how work will be done, what our workforce and culture will look like, etc. My head of HR needs to clearly understand these impacts and develop an HR strategy and business model that embraces this future.”

CEO
Mining Company

Debate 2: Changing Employee Expectations and the New War for Talent

As market conditions intensify the effects of talent shortages, an increasing number of labor market segments are unable to gain industry-relevant skills. The undersupply of critical talent will dramatically increase the cost of talent acquisition strategies and lead to education and training needs.

This raging war for talent has changed how employees view ownership of their work and amplified employee autonomy in an organization. Employees are energized by having more opportunities to make independent business decisions, change how their work is done, or choose how they do their work. As a result, HR leaders perceive the types of skills their organizations are hiring for as critical for driving growth:

- In responding to the new war for talent and employees' changing expectations, CEOs and CHROs agree on the need for more autonomy to make business decisions.
- However, around 60% of CHROs feel employees should be given greater flexibility to choose when, where, and how they do their work, and only 37% of CEOs feel the same way (figure 2).

CHROs must consider how to discuss managing their changing workforces with CEOs. Many organizations have an increasingly multigenerational workforce, which provides both challenges and opportunities and requires new management techniques. HR leaders must therefore understand how to best communicate and partner with the CEO on developing a strategy to deal with this phenomenon.

Debate 3: HR Investment Priorities

The proliferation of new technologies and the threat of automation have increased pressure on employee relations and retraining programs. As the world becomes more digital, organizations demand increasingly analytical skills, and the demand for digital skills exceeds the talent pool.

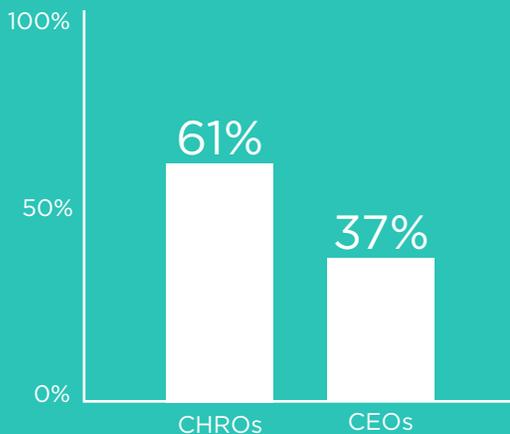
Most executives believe their organizations have a need or responsibility to invest significantly more in retraining employees at risk of redundancy. CEOs and CHROs even mostly agree that people capabilities must take priority. However, CEOs and CHROs disagree on the actual investments needed to advance the HR function and prepare for coming changes:

- CEOs feel their HR functions must invest in cross-functional projects to build relationships and drive impact across the business.
- CHROs, on the other hand, believe strongly in the need to focus on HR technology investments to advance the function through increased use of digital technologies and analytics for talent management activities.

CEOs and CHROs agree that heads of HR should focus on leading the function before all else. However, 76% of CEOs believe their HR function's current operating model effectively drives business outcomes, compared to just 69% of CHROs (figure 3). Regardless of their HR model, CHROs believe they must radically transform how HR services are delivered to internal customers. However, neither CEOs nor CHROs believe investing in structural changes should be prioritized.

Figure 2: Agreement That Employees Should Have Flexibility to Choose When, Where, and How They Work

Percentage of Respondents

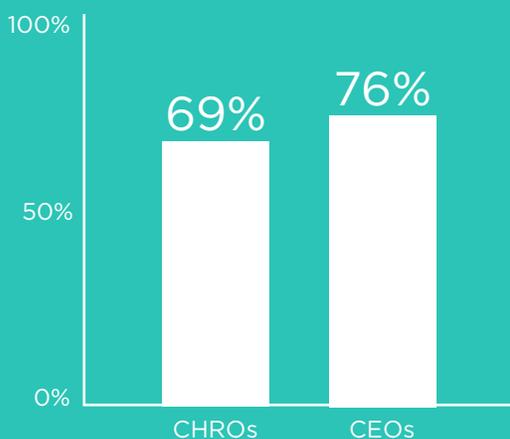


n = 30 CEOs; 153 CHROs.

Source: CEB 2017 CEO 20 Pulse on the Future of Work.

Figure 3: Agreement That HR's Current Operating Model Sufficiently Drives Business Outcomes

Percentage of Respondents



n = 30 CEOs; 153 CHROs.

Source: CEB 2017 CEO 20 Pulse on the Future of Work.

Debate 4: HR's Digital Priorities and Opportunities for Growth

CEOs and CHROs do not agree on what the CHRO's priorities should be in helping the business through its digital transformation:

- CEOs believe the most important priority should be attracting, developing, and retaining the digital talent needed to drive the transformation.
- CHROs feel it is more important to shift business leaders' mind-sets on the talent implications of their organizations' digital strategies. CHROs also feel more strongly they must help CEOs and boards of directors develop digital strategies by identifying the implications of future workforce trends.

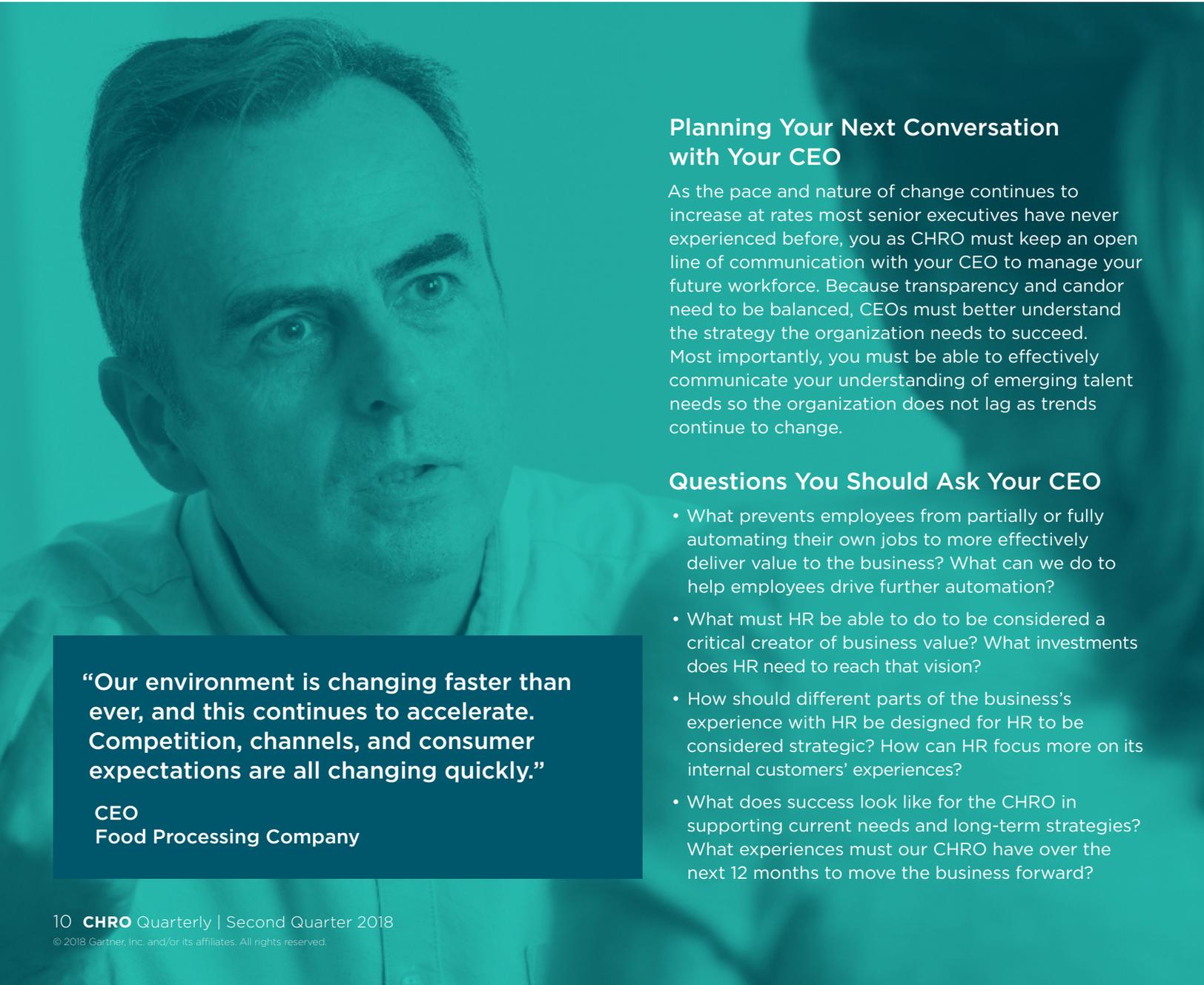
CHROs see many opportunities to respond to the coming changes and drive growth. However, they are unsure whether senior leadership fully understands the rapid pace at which

the organization must change to achieve this growth. Around 70% of CHROs believe significantly changing the technologies employees use for work will lead to growth. In addition, more than half of CHROs believe a different approach to rewarding performance could lead to substantial growth; they indicate that current rewards practices are suboptimal.

Conclusion: What Does This Mean for the Future?

These trends will soon radically change the work employees need to do as well as their employment expectations. Advanced technologies and digital transformation are generating new opportunities to create value, but organizations that do not respond appropriately may lose a lot. It is up to CHROs to align and partner with CEOs in creating a strategy that allows the organization to best confront this challenge.

¹ Daryl C. Plummer et al., "Top Strategic Predictions for 2018 and Beyond: Pace Yourself, for Sanity's Sake," Gartner, 29 September 2017, <https://www.gartner.com/doc/3803530?srclid=1-6595640685>.



Planning Your Next Conversation with Your CEO

As the pace and nature of change continues to increase at rates most senior executives have never experienced before, you as CHRO must keep an open line of communication with your CEO to manage your future workforce. Because transparency and candor need to be balanced, CEOs must better understand the strategy the organization needs to succeed. Most importantly, you must be able to effectively communicate your understanding of emerging talent needs so the organization does not lag as trends continue to change.

Questions You Should Ask Your CEO

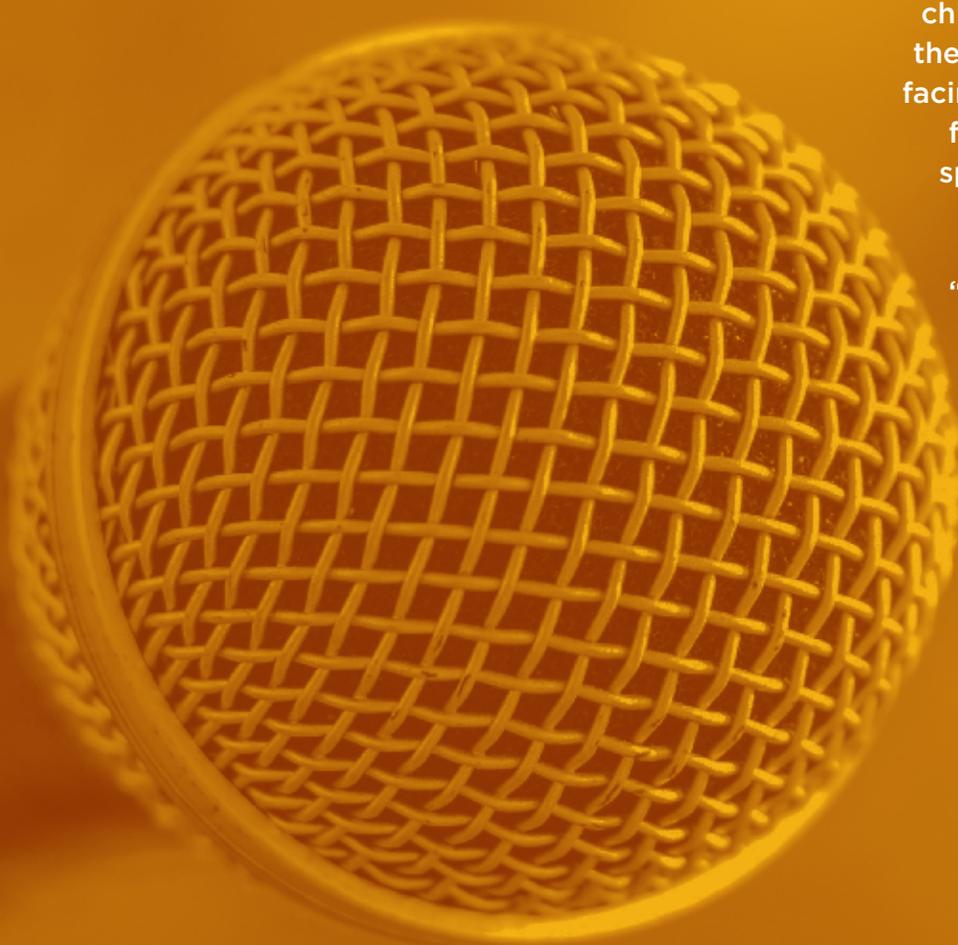
- What prevents employees from partially or fully automating their own jobs to more effectively deliver value to the business? What can we do to help employees drive further automation?
- What must HR be able to do to be considered a critical creator of business value? What investments does HR need to reach that vision?
- How should different parts of the business's experience with HR be designed for HR to be considered strategic? How can HR focus more on its internal customers' experiences?
- What does success look like for the CHRO in supporting current needs and long-term strategies? What experiences must our CHRO have over the next 12 months to move the business forward?

“Our environment is changing faster than ever, and this continues to accelerate. Competition, channels, and consumer expectations are all changing quickly.”

**CEO
Food Processing Company**

Voice of the CHRO

By **Matt Dudek, Brian Kropp, and Lori Lipe**



Every quarter, we interview chief HR executives to gain their perspectives on issues facing their business and HR function. This quarter, we spoke with Hein Knaapen, CHRO at ING Group, about his organization's "Think Forward" strategy to shift employee expectations and lead in a changing world.



About ING Group and Hein Knaapen

The ING Group is a Dutch multinational banking and financial services corporation with a workforce of over 51,000 employees. Hein Knaapen is CHRO of ING Group and oversees all HR activities of the group.

CEOs and CHROs tell us changing customer expectations is the most disruptive trend facing their organizations. This is true at ING Group as well and drives ING Group’s global strategy, Think Forward, which aims to unite the organization to create a differentiating customer experience. What is HR’s role in enabling a differentiating customer experience?

HEIN: Think Forward is a strategy we launched four years ago. When our current CEO, Ralph Hamers, took on his role, he articulated the idea that we are here to empower people to stay a step ahead in life and in business. This comes with a customer promise that everything we offer should be instant, personal, relevant, and seamless.

From that follow a number of strategic priorities and enablers. We are a modern conventional bank, but we are starting to become a very different sort of company. We are accelerating our strategy and want to turn ourselves into a platform company (BaaP¹) because we believe that serves the interest of the customer best. In looking at what we want to be for the customer, we have to start thinking beyond banking.

To achieve this goal, there is an agreement about the contribution of the HR function. Our CEO intuitively appreciates the value of a great people agenda. We have worked with him to make changes in our senior HR leadership team and have substantially increased the level of the team’s capabilities. In doing that, we have also become clearer about “What are we here for?” and where HR actually adds value. Our role is to enhance management capabilities by creating greater leaders. If we do this, we can have an enormous impact on this business.

So we decided to redesign the HR function to better enhance management capability. At first, we planned to outsource a number of HR processes that were more administrative as part of our overall ambitions to simplify and streamline ING Group. However, along the way, we realized that offering great people services was the more direct way to build the capability and engage the wider workforce — not just

administering but really delivering a great employee experience. This shift in thinking — from HR administration to people services — was a big step for us and really landed when we started launching an integrated people information system. If you move from scattered local HR administrators to centralized, standardized people services that create a differentiating employee experience, HR adds way more value.

Piecing that together, we landed at the final picture of what we, as HR, are here for. We are here to build engagement and craftsmanship for *everyone* who works at ING Group to deliver on our strategy in two ways —

1. By offering great people services to create a differentiating employee experience.
2. By enhancing management capabilities and globalizing our communities of expertise.

By doing that, you take away all the distractors in the work of an HRBP. We should do that solution building for them. HRBPs should be dealing with only one thing: creating better managers.

If you go back a decade or two, the shift in HR was from transactional to strategic. “Strategic” and “leader” were synonymous, as were “HR administrator” and “employee.” However, in today’s environment, this mind-set shift you describe — from administrative to service oriented — has unlocked this realization that you can actually add value to seemingly transactional interactions with employees.

HEIN: Exactly. You have to build value-added solutions for employees that, in turn, free up HRBPs at every level. When you offer a toolkit of great solutions to employees and say,

“HRBPs should be dealing with only one thing: creating better managers.”

¹Banking as a platform. Refers to a collaborative, innovative banking model that embraces value chains outside the bank and divides the industry into product, process, and retailer. To learn more, see: GFT, “Bank as a Platform: The Bank of the Future Will Be More Open, Modular, and Made to Measure for Every Individual Customer,” 2018, <https://www.gft.com/us/en/index/banking/digital-banking/bank-as-a-platform/>.

“Only use our stuff — not HRBPs’ — because it is good stuff,” HRBPs then have to focus on using that stuff to create better leaders. Information systems, standardized people processes, and a strong global community of expertise all go hand in hand.

How has this new vision for the HR function changed the traits you look for in great HR staff and leaders?

HEIN: In general, I am in favor of sustaining a few “spikey” specialists rather than someone who has a bit of everything. To that point, I would say we have come to appreciate three very different HR professional profiles:

- The first is people services, where great operators and customer experience people are needed. These individuals need to offer seamless and perfectly organized service. They need a great understanding of what makes a strong user or employee experience.
- The second profile would be experts and subject matter specialists. This is where solutions are built, external knowledge is brought in, and capabilities of HRBPs are sustained.
- The third profile is the HRBP, the interface with the business. The skill set here helps you operate on equal footing with your management team to make them better managers and leaders. Here, you would use performance management, leadership development, and data analytics, among other capabilities.

Speaking of employee experience, many organizations are applying consumer marketing techniques to provide better experiences. One challenge we hear about is acting on the new insights this approach generates. HR has to balance creating personalized employee experiences with limited budgets and a need for scale. How do you approach this challenge?

HEIN: By being totally standardized in the back and entirely bespoke in the front. Our partner, IBM, really understands personalized customer and employee experience. Take the learning experience as an example. We have selected IBM to create this experience within ING Group, as it creates a deeply personalized experience for employees. Learning requirements will be decided on first by our business, and then building solutions is taken out of our hands by IBM. IBM will design the optimal learning experience and then go out to a vendor that will produce it. This creates consistency in learning effectiveness. The system will register what an individual user likes in learning, and how fast the user learns, and will continuously adjust the way it offers learning to match the user’s preferences.

HR is under a lot of pressure to better use data to improve the employee experience. At ING Group, you are launching a new continuous listening practice to better measure the effectiveness of your people projects. How are you setting this up?

HEIN: We have always had a semiannual engagement survey, but when the current CEO took on his role, I convinced him that there was an interesting organizational health index tool that we might also want to run. When we received the latest results, we saw two things:

1. The two semiannual surveys combined provide one deep set of responses per year. We like the depth and authority of those surveys, but the information can quickly get outdated.
2. Every part of the bank was running its own survey locally, which wasn’t of the right quality.

The question became, how can we create a tool that allows us to create more continuous information but is also a platform for countries within ING Group if they want to measure local metrics?

To do this, we sanitized all the questions we had in those two big surveys, and we created a central repository of questions tested for predicted validity of future company performance. They are statistically validated. We compiled those questions into a survey we run every three months. What that gives us is

“You have to strike a balance between showing you are responsive to what people tell you and, on the other hand, not driving yourself mad by continuously changing your actions.”

information that links to future company performance and a simple way to check on how health and engagement develop. It also gives us a tool that is available for any part of the bank that wants to look into the details of organizational health.

Conceptually, this is not all that difficult. It is “unsexy” work but has great impact.

Are you experimenting with other information sources to complement your pulse surveys to better listen to employees?

HEIN: Yes, absolutely. This repository of questions is only one source of data, so you may venture into other sources. Event-related satisfaction, is also relevant for engagement. If you have a concrete event, such as a transaction between you and your boss, and you are happy with that experience, that experience will create employee satisfaction, which feeds into employee experience. In that sense, the data and surveys on engagement are one source of information. Employee satisfaction in relation to events and transactions is another source.

You might also venture into social media. We have so much computing power nowadays; you can measure everything. However, if you measure things like that, it takes time to fully understand what it means. So my advice is to make sure you have that understanding first, before you act on it.

To that point, how do you balance the need for continuous listening with the need for continuous action, so the workforce sees that HR doesn't just collect data but also acts on it?

HEIN: On action, you have to strike a balance between showing you are responsive to what people tell you and, on the other hand, not driving yourself mad by continuously changing your actions. As an example, the latest of our health index results indicate we've made really good progress on many health outcomes at ING Group. There are, of course, areas where we are less strong. We want to leave as much room

as possible for various parts of the bank to pull together their own improvement plans on the basis of their own reports. That is typically an improvement priority that you invest time and resources in, uninterrupted, for about a year. You can then see if that has brought you any promising change. This allows you to keep a record of how well you are improving. It does not necessarily change the priorities of the bank every quarter.

Finally, what is the one thing CHROs must change in the next 12 months in how they lead their HR functions to most effectively support the business?

HEIN: HRBPs are burdened with too much work that can be done by others and are often hiding away in that work. Making sure you are on equal footing with management requires good thinking about how you can improve the business. The role of the HRBP is where I believe we can make the greatest strides to achieve that.

“

Making sure you are on equal footing with management requires good thinking about how you can improve the business. The role of the HRBP is where I believe we can make the greatest strides to achieve that.

”

By **James Cheung**

Discussing Corporate Culture with Investors and Analysts



Investors and analysts are increasing their scrutiny of firms' talent strategies to look for more qualitative information that helps them understand the organization's operations. More than 8 in 10 investors agree that qualitative information helps them evaluate forward-looking information and guidance — and that qualitative information is critical when deciding to buy and sell stocks.¹ Investors need this qualitative information, as it allows them to stay ahead of markets and remain competitive.

Consequently, the desire for more qualitative information — specifically on a firm's talent — is showing up more frequently on earnings calls. As investors seek ever more data for their valuation models and investment decisions, the number of conversations about talent (in both prepared remarks and Q&A) during major companies' earnings calls has increased by about 17% since 2010 (figure 1).

Companies are not required to disclose information about their workforces, which makes earnings calls a prime opportunity for investors and analysts to ask about people strategy. Beyond earnings calls, institutional investors are increasingly seeking to compel disclosure of specific human capital metrics. In 2017 alone, institutional investors with trillions of dollars in assets made two separate requests, in the United Kingdom and in the United States, to have firms disclose more information about their people.²

At the center of these talent discussions is an acute focus on culture. Culture is by far the most mentioned aspect of talent on earnings calls, with twice as many mentions as the second most mentioned talent topic. In fact, mentions of culture on earnings calls increased at a 12% annual clip from 2012 to 2017.

This trend underscores a new and urgent opportunity for CEOs to position their corporate culture as a key value driver in presentations to the market and investors. Fortunately, the CHRO can be a key partner, aiding CEOs in these efforts. The CHRO's knowledge of the firm's business and talent strategies

enables him or her to craft the cultural insights that analysts and investors value.

How to Better Prepare to Discuss Culture on Your Next Earnings Call

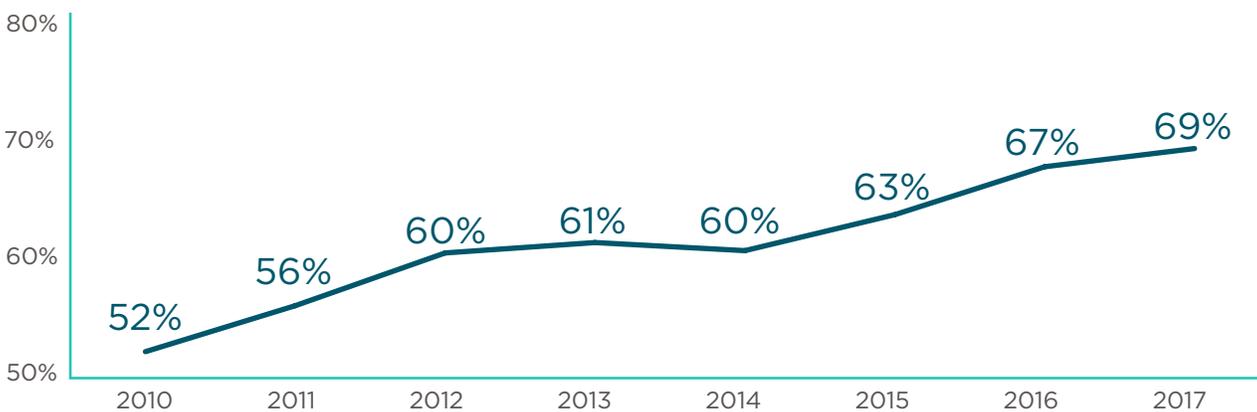
Regardless of whether your organization is going through a merger, a culture transformation, or another enterprise change, your CEO must be prepared to talk about culture in a substantive way with the investor community. Share the following four simple yet powerful pieces of actionable advice with your CEO to help him or her work with you and the head of Investor Relations on this issue.

1. Talk to investors and analysts about how they approach corporate culture.

To communicate more effectively how corporate culture drives firm performance, CEOs first must ask themselves, how do the investors and analysts who follow our company define corporate culture? The investment community often has a limited — and sometimes inaccurate — understanding of corporate culture. Many think a strong culture is simply having the right person in the right position to accomplish goals. In reality, culture is much more.

To tackle these misunderstandings, CEOs should charge the head of HR to work with the head of Investor Relations in developing a simple plan to quickly identify how investors and analysts following the company think about talent — and specifically culture. It is important for the CHRO to work closely with the head of Investor Relations; the CHRO is best positioned to identify aspects of the firm's culture strategy that investors would care about, and the head of Investor Relations is best positioned to incorporate this into key messages to the market.

Figure 1: Percentage of Companies Discussing Talent on Earnings Calls



Source: CEB analysis; AlphaSense (accessed January 2017), <https://research.alpha-sense.com>.
Note: Searches were limited to the use of terms in a talent management context and included words and phrases synonymous with the terms, with an updated methodology as of 15 October 2015. Search parameters were limited to earnings calls released from 1 January 2010 to 31 December 2017 from publicly listed companies in the S&P Global 1200 and S&P MidCap 400 indices as of 31 December 2017.

2. Create an overarching culture narrative for investors and analysts.

Because organizations have gone through many changes over the past few years — cultural and otherwise — they face new sources of internal complexity that executives struggle to explain to external stakeholders. As a result, executives also struggle to adjust their core messaging to the market.

This risk is coming into focus for many companies: their “messy” organization is at best confusing audiences and at worst creating mistrust and alienating stakeholders, from investors to customers.

Creating a clear, substantive, yet succinct narrative about an organization’s culture is essential to driving investor and analyst understanding of how the firm will achieve its short- and long-term performance targets. To effectively create this narrative with your CHRO:

- **Explain the past, present, and future of the culture.** The investment community needs context to meaningfully factor culture into its understanding of the company. Understanding the present state of their own company is something most executives struggle with and must first get right.
- **Make sure the cultural narrative reflects everyone’s experience.** To get frontline input, consider selecting a group of outspoken employees to serve as “culture journalists” who observe and talk with peers about the culture.
- **Share reliable indicators of cultural progress.** Institutional investors are among the most vocal groups agitating for better metrics to evaluate culture and other people issues. A good cultural narrative must therefore show strong qualitative, if not quantitative, measures of progress.

3. Clarify the connection between culture and quarterly earnings.

On a number of earnings calls, CEOs and CFOs mention culture in passing but fail to show how it really explains company earnings for that quarter. Simply stating that culture is the reason for strong earnings — or expected earnings improvement — is not enough for investors and analysts. However, it is difficult to align cultural outcomes with a strict quarterly schedule, even with a strong corporate culture narrative.

Consider reviewing the organization’s culture strategy with your CHRO to identify one or two culture activities you can align (or realign) with the earnings call schedule so it can be included in the call. For example, can the organization launch, collect, and report pulse survey data on a certain aspect of the culture in the same quarter?

A key implication of this approach is ensuring strong accountability for culture activities and outcomes.

4. Anticipate investor questions that require a cultural response.

One of the biggest challenges for heads of Investor Relations is predicting questions during earnings calls. Preparation is crucial for success; CEOs must practice to convey the correct messages about culture and other issues. However, almost half of executives either avoid practicing earnings calls altogether or spend less than two hours practicing (figure 2).

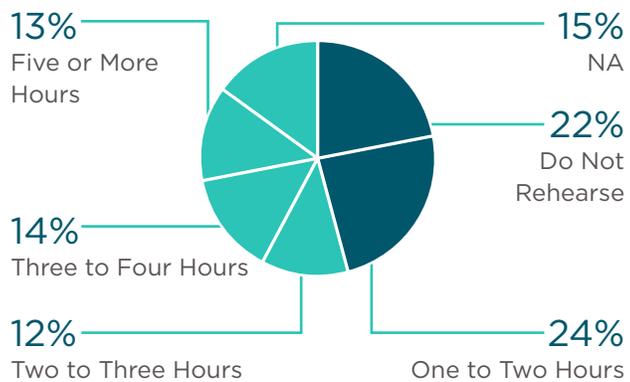
To minimize uncertainty, organizations rely on a combination of caller screening tactics and prescribed answers from the Investor Relations team. However, the team’s preparation questions often focus more on preparing the CFO for financial questions than on preparing the CEO for questions about the workforce and corporate culture.

One way to enhance preparation is for the CHRO to partner with the head of Investor Relations and create sample questions related to culture. Including these HR-generated questions in the Investor Relations question pool will ensure the CEO is adequately prepared.

Conclusion

Talent is an integral part of every company, and information about it can help investors make more informed decisions. Because companies are not required to disclose talent information, earnings calls are often the forum where investors bring their talent-related questions. This trend likely contributes to the growing number of talent-related conversations on earnings calls each year. As culture continues to become more popular among Wall Street analysts, companies must adapt the way they talk about it on earnings calls.

Figure 2: Time Spent Practicing Earnings Calls
Percentage of CEOs



Source: Alexander Miachika and Jonathan P. Rochwarger, “Earnings Call Practices: How Does Your Company Compare to Others?” *Lexology*, 26 January 2015, <https://www.lexology.com/library/detail.aspx?g=bc801101-b83d-4934-bd0f-71c01c0d3a04>.

¹ David Creelman and John Boudreau, “When Investors Want to Know How You Treat People,” *Harvard Business Review*, 10 February 2015, <https://hbr.org/2015/02/when-investors-want-to-know-how-you-treat-people>.

² David McCann, “Investors to SEC: Mandate People Disclosures,” *CFO*, 20 July 2017, <http://ww2.cfo.com/people/2017/07/investors-to-sec-mandate-people-disclosures-human-capital/>.

By **Marcus Chiu** and **Matt Dudek**

Digitalization and Agile HR: Interview with Angie Freeman

We spoke with Angie Freeman, CHRO at C.H. Robinson, about how the company has thoughtfully applied agile principles to its HR practices and is responding to shifting employee expectations in a changing work landscape.

Employees today are more empowered and expect to be treated more like consumers by their employers. How is this trend affecting C.H. Robinson and the way you think about using limited resources to respond to employees' needs?

ANGIE: We are experiencing this right now. For us, this trend is heightened because our workforce is approximately 65% millennials and we are starting to hire generation Z workers. Generally, we feel employees who are a bit younger and newer to the workforce have an expectation that their experiences with work should be comparable to services they get as consumers elsewhere. It's forcing us to think about how we deliver that same level of quality, experience, and autonomy they experience in other parts of their world.

Your HR function has gone on a big agile journey over the past few years. How did it start?

ANGIE: Our IT group adopted agile for software development in order to move more quickly while delivering high quality. They saw value in delivering the product iteratively and getting feedback along the way.



Angie Freeman
CHRO
C.H. Robinson



C.H. ROBINSON
WORLDWIDE, INC.



We saw how they were doing this, and we were intrigued by the concept of a backlog and ruthless prioritization. Agile ensures transparency and focus on work that has the greatest business impact. We also noted that working in an agile framework enables you to move at a faster pace. Breaking large, complicated projects into more reasonable, consumable pieces, we organize small teams to come together and leverage some of the agile rituals to deliver products quickly.

Given today's pace of change for many companies, by the time you deliver under traditional project management methods, the needs of the business have moved on. For us, this means being able to coordinate many groups and to pivot as things change. We deliver big initiatives with demos once a week. Then you inspect, adapt, and keep moving. In this way, the agile framework used by software developers felt very relevant to what we needed in HR in order to best meet business needs.

First, our HR leadership team learned how agile worked and why. We then started implementing it in our planning and prioritization processes. We saw immediate improvement and decided we were going to leverage it to build and empower teams and develop our services and products. We use visual management techniques to track our progress. Some of the rituals we observe are high- and midlevel planning games, daily stand-ups, demos, and prototypes. The planning games, for example, are a critical way to bring together multiple functional areas to ensure the work is integrated and we are holding each other accountable.

But it's not just about the rituals. Agile is just as much a mindset as it is a structure of working. We wanted to ensure our teammates understood why this would make us more effective and how it would empower them to lead the work.

How receptive were HR teams and individual staff to adopting this new way of working?

ANGIE: Our centers of expertise (COEs) were early adopters because they loved how they were able to bring their different areas of expertise and integrate across COEs in order to directly support business strategy in a new way.

Not everyone wants to work this way, however, and we've found that some people make choices to eventually opt out of this way of working and its culture by leaving the organization. That's one thing that can happen through this process. Nevertheless, the people who liked this way of working really embraced it. To them, it is a much more empowering and rewarding way of working.

How did you upskill the team on agile methodology? Was there formal classroom training or did you play to the experience differently?

ANGIE: First of all, it took some real understanding of the agile rituals and framework to put it to work for HR. We were fortunate in that a member of my leadership team had some formal training through IT in order to provide prioritization for our HRIS teams. She translated it for us to make it work for HR. As you know, agile was originally created to develop software. At the time, our IT team had some incredible coaches whom we were able to leverage for both formal and informal learning on the subject.

In our early stages, we created agile ambassadors to understand the frameworks and to be able to drive some of the initiatives. We learned you have to be very intentional about continuously communicating the benefits of this work and why we are doing so people don't revert to their former way of doing things. There is a lot in agile about being an empowered

team member, working face to face, and transparency. We find our teams are holding each other accountable.

Can you talk more about how teams are holding each other accountable to build and sustain momentum for working in an agile way?

ANGIE: One of the key agile concepts is self-governing teams; however, we are very intentional about holding ourselves to date-driven milestones. And our people want to do great work. The team members understand their deliverables as a whole system, not just COE-specific deliverables. So they collaborate, support each other, and work together to be as high performing as possible.

Sometimes, it's just conversations and interventions. When we first introduced agile, there were a few instances where some employees didn't adapt well to that kind of working environment. Sometimes it took additional coaching to get them there.

One of the things you said is that having agile ambassadors among the HR team was a key to success. How do you select and equip those in the ambassador role?

ANGIE: Just like with any change management process, you have to have internal champions who aren't formal leaders. You need influential people whom others listen to and who are close to the work. Every team has people who are opinion leaders and others who watch to see how they react.

We made selections based on existing roles as well as individual competencies and the social capital certain people brought to the team. We had an existing team of people who were project managers for HR and had grown up in the "waterfall" method. We made sure they got agile training and exposure to this new methodology right away. They became the agile team that was driving us forward.

Beyond these agile teams, we looked for people who were excited about learning new things and who wanted to be informal leaders. We don't have any formalized tool that would help us with that. It's been the managers putting the teams together by figuring out the strengths every person brings.

Did anyone from your IT function, or who had previously made the agile transition in their function, come in and help with the transition?

ANGIE: Yes. We were very fortunate to have a strong partnership with IT and, as I mentioned, they had some incredible coaches on staff. They were very good partners and coaches through the beginning, and we continue to collaborate on how we organize and share sponsor updates. This methodology is fairly common in IT, and it's becoming more common for more corporate functions. A lot of companies are now looking at not just having certain functions

be agile but rather having agility be enterprise wide. That's when you harness the biggest benefits.

In agile, the product manager is the one who really drives the emphasis on customer voice. Who is bringing to light the customer and user voice in this HR structure?

ANGIE: We have people on our team who are playing that role of bringing the voice of the customer into the process and helping to drive feedback, but this can vary by team. Our HR business partners are critical to this. They deeply understand the business and consult on prioritizing the work and also ensure our HR solutions are integrated across functions.

The roles you have in IT to do agile are the same roles you need in any other function in terms of stakeholder representation, managing the work, and liaising with customers and senior executives. The work IT is doing might be different, but you still need the same roles. Carefully building each team with the right skills and mindset is a key to success because of the self-organizing nature of the team.

Are you seeing real changes now in the way HR staff bring customer voice into their work as a result?

ANGIE: Yes. A core part of thinking agile is to think about value delivery and understand the needs of the customer. This means getting customer input on the need, the design, and the outcome, which includes having customers come to the demos and daily stand-ups. It requires more time to be a part

“Agile is just as much a mind-set as it is a structure of working.”

of these rituals, but the investment is worth it because the end product is stronger. You have to differentiate based on the stakeholder but also ensure you are getting an adequate amount of input to customize the delivery.

The other concept we've focused on is the idea of minimally viable product (MVP). You're not trying to build perfection; you're trying to find the balance between time, quality, and money for the customer.

Agile solves for the very thing traditional project management doesn't: by the time you deliver — after a long period of time and an early, fixed definition of requirements — the needs of the business have changed. With agile, you avoid that by trying to stay on pace with changes and adapting as you go.

We're seeing more pressure on HR to deliver its solutions through digital channels. So between this trend and adopting agile ways of working, are you finding the MVPs you're building are a lot more technologically centric?

ANGIE: Yes, but we apply the concept of MVP to almost anything we deliver. And almost all talent management processes are enabled by technology. By focusing on MVP, we can deliver the right thing at the right time and focus on more complicated features later.

As you think about what you're most proud of during this journey, is there anything specific that you'd point to?

ANGIE: We are convinced the quality of our output is higher based on measured impact. Speed, quality, and employee engagement are all indicators. We know we are delivering things faster than we used to. In terms of the impact of the things we've worked on, and how it has changed behavior and driven revenue, those all point in the right direction. The feedback from our employees points to their satisfaction with the culture they are part of.

What do you hope to achieve in pushing your function forward?

ANGIE: There are two frontiers for us here:

- One is moving toward enterprise agility by taking this way of working in HR and IT and changing how teams operate across the enterprise. We're still thinking through how to organize multifunctional and multidisciplinary teams to come together, work on a project and then disband. That is challenging in a corporation's typical functional and business unit structure.
- Related to that is thinking about how to ensure HR best practice is modified to enable and support agile teams. We're thinking through how to manage and hold people to performance expectations — and how to appropriately motivate and compensate them in a much more fluid structure than a traditionally siloed structure. This isn't specific to HR; this is across the enterprise. Nevertheless, HR has to take a leadership role to identify how these practices and this culture change can enable that to happen for the corporation.

C.H. Robinson's Agile HR Journey: What It Did Right

1. Work in short sprints to get the right feedback at the right time. Understanding the needs of the customer is foundational to agile, so HR began delivering earlier iterations of solutions to customers. By implementing changes incrementally, HR could engage with the end user throughout the process, which allowed HR staff to continuously evolve their products and services.

2. Reinforce the “why” behind going agile with agile ambassadors. Angie and C.H. Robinson reinforced the shift to an agile way of working by calling on agile ambassadors within HR. They didn't just highlight the business rationale and the value for HR's internal customers; they continuously reinforced the personal benefits of the approach with HR staff.

3. Use internal champions to reinforce the agile mind-set. A key concept in agile is self-governing teams. To build the core of its new self-governing teams, C.H. Robinson trained internal champions selected from current HR project managers and highly influential HR staff. These champions then disseminated the agile approach throughout the HR function and kept others accountable.



Inside the Mind of Your CFO

**Creating the
Conditions for
Efficient Growth**

**An inside look at what heads of HR need to know to support
the growth challenges keeping CFOs up at night**

By **Staff**

Investor expectations for 2017 continue to ratchet up: in the United States, for example, S&P 500 companies are expected to grow revenue by 7% and earnings by 11%. Previously, companies could receive a pass in a “slow-growth environment.” But given recent macrodevelopments (e.g., rising rates, expected benefits from lower taxes, less regulation, potentially repatriated cash), CFOs are expected to grow earnings faster in 2017. The pressure to spur growth is forcing them to revisit and rethink capital allocation and business and investment management decisions for the coming year.

This is not just a CFO problem. Because CHROs are increasingly recognized as business leaders, not just HR leaders, they must actively participate in this arena. It’s a critical time for CHROs to partner with CFOs on their journey to help their organizations drive shareholder value through what we call efficient growth.

The CFO’s number-one mandate is to drive efficient growth despite economic and business hurdles, such as weak emerging markets, regulatory uncertainty, investor activism, and risk-averse management teams. All efficient growth leaders – companies that have achieved long-term revenue increases across business cycles while improving earnings – share the same secret to their success: consistent allocation of capital toward bigger, riskier growth bets.

To support the risky bets that enable efficient growth, CHROs must prepare for aggressive talent strategy decisions that will

support those moves. This article lays out the nature of CFOs’ efficient growth challenge and discusses specific ways CHROs can intervene to improve the chances of success.

Efficient Growth:
Long-term revenue increases across business cycles while improving earnings

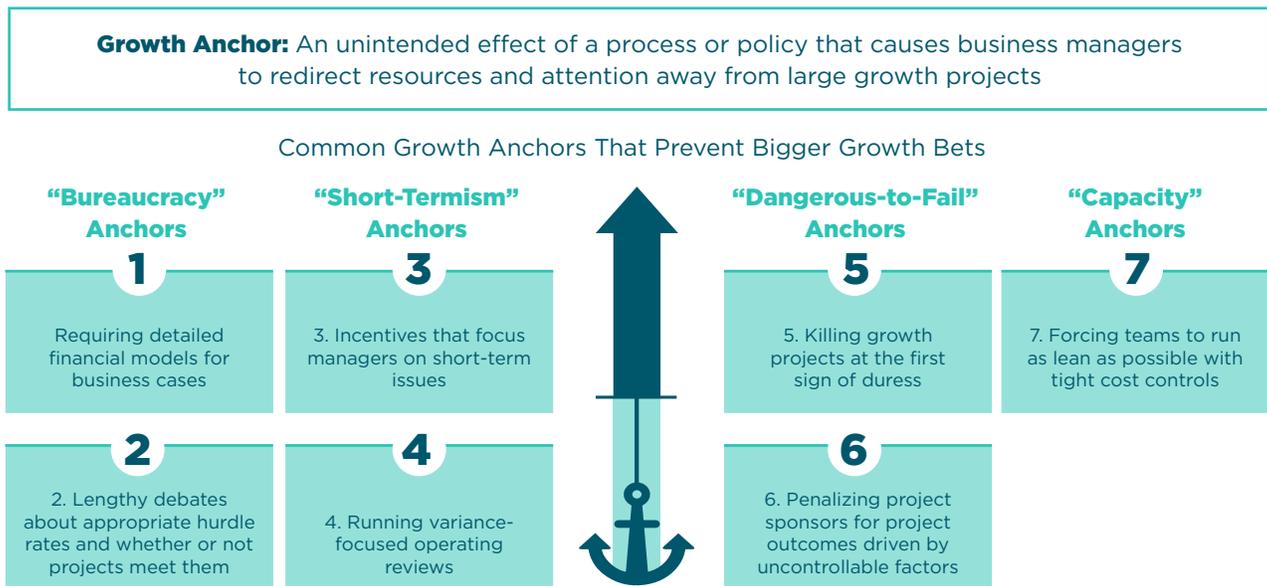
What Holds Most Companies Back: Growth Anchors

A growth anchor is the unintended effect of a process or policy that causes business managers to redirect resources and attention away from large expansion projects. Growth anchors stop companies from dedicating the needed amount of funding to transformational growth projects.

Growth anchors manifest in many forms, including practices that cause unnecessary bureaucracy, such as lengthy debates about appropriate investment hurdle rates and whether projects meet them (figure 1). In the words of one CFO of a Fortune 100 company, “Nothing gets done here without Finance on board, and that’s a bad thing.”

Growth anchors also include side effects – policies that cause short-term thinking – such as business operating reviews that focus on budget and forecast variances. Still others dissuade leaders from proposing riskier projects because they make it dangerous to fail or they rob businesses of the capacity to make bigger bets.

Figure 1: Seven Types of Organizational Growth Anchors



Source: CEB analysis.

The Solution: Remove Anchors

The main attribute efficient growth companies share is an understanding of how to remove the obstacles to funding and managing projects that accelerate growth. Organizations must take two actions right now to combat growth anchors and achieve efficient growth:

1. Identify growth anchors caused by processes and policies.
2. Find ways HR can contribute to removing these growth anchors.

Of the seven growth anchors, we have identified three on which heads of HR can have the greatest impact:

- Incentives that focus business managers on short-term issues
- Killing growth projects at the first sign of duress
- Forcing teams to run as lean as possible with tight cost controls

The following are best practices from organizations that have already tackled these anchors.

Anchor 1: Incentives That Focus Managers on Short-Term Issues

At many organizations, employees do not fully value and understand incentive programs the way the organization had intended. Utility company Zeta Energy¹ initially tried to correct this misunderstanding by instituting a long-term incentive (LTI) program designed to drive growth by rewarding employees for engaging in behaviors that supported its strategy. However, it found that while employees understood the program's basic details, they did not understand its purpose or how their actions affected payouts. Most importantly, employees did not understand the connection between their performance and long-term growth goals.

Zeta Energy now helps employees understand its LTI plan by organizing LTI communication around one key theme: how employees can align their performance with corporate strategy to grow their LTI value over time. Zeta Energy analyzes reasons why employees may not buy in to the strategy (e.g., gaps in knowledge, current misperceptions) and then prioritizes evidence to support the theme based on the analysis. Zeta Energy found the theme-based communication increased employees' understanding of how their performance can drive the long-term value of their LTI.

“Driving a company to growth is like driving a car: before you put your foot on the accelerator, you’ve got to take your foot off the brake. For example, Finance has its foot on the brake when its processes and policies cause business managers to redirect resources and attention away from large growth projects, kill projects too soon, or establish inflexible hurdle rates that keep ideas from being heard at all.”

Tim Raiswell

Principal Research Leader, Finance Practice
CEB, Now Gartner

¹ Pseudonym.

Anchor 2: Killing Growth Projects at the First Sign of Duress

Most group evaluations fail to uncover the true causes of bad performance because they tend to focus on evaluating individuals' performance rather than understanding the work. Lenovo, for example, cut projects simply because it had more complex challenges. To help its global workforce balance speed with quality, Lenovo needed a better way to evaluate the quality of projects. The process it created, known as fu pan, focuses on evaluating the work instead of the people.

Fu pan comprises four steps:

1. Realign the group to a shared end goal.
2. Emphasize what's actually occurring, both positive and negative, rather than who is doing it.
3. Drive robust analysis of the causes of bad performance beyond individuals.
4. Drive focus on improving in the future rather than identifying what should have happened in the past.

By embedding fu pan into its entire workforce, Lenovo has maintained rigorous speed without sacrificing quality. Specifically, Lenovo credits use of fu pan with improved business results, enhanced collaboration, and increased employee engagement.

Anchor 3: Forcing Teams to Run as Lean as Possible with Tight Cost Controls

You can get more out of your teams in two ways: increase their size or improve their functionality. Since resource constraints often limit our ability to grow teams substantially, we must instead focus on increasing efficiency through enterprise contribution (i.e., employees' ability to use other people in the organization to improve their own performance and to improve those colleagues' performance in turn).

Encourage an environment in which team members reach goals more quickly through collaboration rather than more slowly with a focus on individual performance. Most employees are willing to be enterprise contributors, but they feel that performance management systems do not capture enterprise contribution. Indeed, our research shows the average company's relative weighting of network performance is only 17% of total employee evaluation. To foster greater collaboration, ensure performance management evaluations explicitly take network performance into account.

Implications for Heads of HR

Heads of HR can take steps like the following to create an environment that supports moving ahead on good growth ideas:

- Ensure good people have the right incentives and resources.
- Use the right metrics to measure success.
- Communicate the right message in team performance reviews.

Meet with your CFO to ensure these talent management practices support efficient growth.

Encourage an environment in which team members reach goals more quickly through collaboration rather than more slowly with a focus on individual performance.

Key Questions to Discuss with Your CFO

- How should we change the profile of ideal Finance talent need to embrace the skills and competencies of efficient growth drivers?
- Are we providing the right incentives and resources to support your team in taking the needed risks to drive growth?
- Which growth anchors are holding your team back most? How can we change performance management metrics and communication to leave space for smart risks, encourage long-termism, and otherwise discourage growth anchors?

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Digitalizing HR

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The CHRO Agenda

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