



FOSWAY
GROUP

Transforming Talent in the Modern Workforce

2017



Skillsft

sumtotal
A Skillsoft Company



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Foreword

This project was borne of a collective sense of both curiosity and duty – curiosity regarding the current state of both the modern workforce and learner, and duty as to how best to assist companies and their workforce prepare for the future.

To attempt to define the current landscape and gauge how companies are transforming and progressing with technology and shifting cultural norms, Fosway Group, in partnership with Skillsoft and SumTotal, collaborated on a research project that saw participation from a wide selection of industries within the EMEA region.

It is thanks to this participation on every level, a participation for which everyone involved is deeply grateful for, that has produced this definitive and compelling body of research.

It is the hope and objective of Fosway Group, Skillsoft and SumTotal that the findings herein will guide and direct companies and organisations as they continue to thrive and evolve in an ever-changing world.

Best regards

Tony Glass
GM and CVP EMEA
Skillsoft



Liam Butler
VP EMEA
SumTotal Systems





Executive Summary

Changes in the world of work, evolving employee expectations and advances in technology are creating a perfect storm that is transforming the modern workforce and the modern workplace. Pitched against a backdrop of growing skills gaps, the pressures for organisations to rethink their talent approach - and systems - is intense.

So, how prepared are organisations for the modern workforce? And how prepared is their talent management agenda for this fast-moving world? The answer appears to be that they are not. Whilst some areas like performance and appraisal appear to be more mature and advanced, the areas that are frequently cited as being most important to the modern workforce and the brand proposition that attracts and retains the best workers, is not.

For many it's a lack of innovation or adoption of next generation technologies to properly support talent. But often the issue is more fundamental; organisational denial that there is even a need to respond to changing demographics and demands. And whilst there is a minority of organisations that report being very advanced (10%) in their response to the way work is changing, there are a significant majority who risk being left behind whilst their more agile competitors take the war for talent to the next level.

Why is this research important?

This research looks to lift the lid on the most important aspects of the changing workforce, the modern workplace and talent management, and understand how organisations are responding to positively engage with the workers of today – and tomorrow.

How was this research conducted?

The research was conducted by Fosway Group between February and April 2017, using a survey of Skillsoft and SumTotal customers from the EMEA region. This was supplemented with a number of in-depth analyst interviews with Heads of Department, Managers and CEOs to dig deeper into the realities of their experience of the modern workforce.





Understanding the respondents

They are predominately European

- 61% work for an organisation that is based, or are personally based, in Europe

They are mainly senior decision makers, managers or director level employees

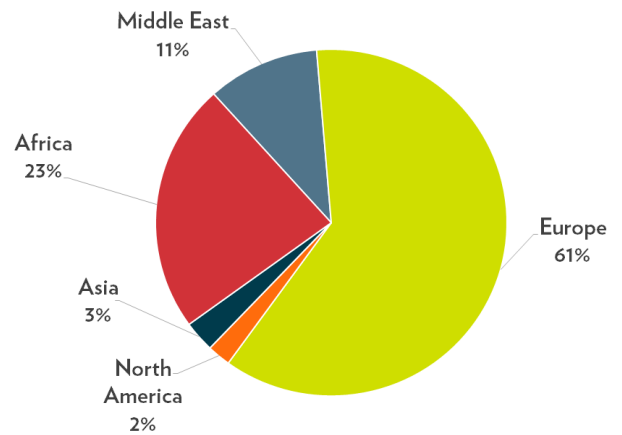
- 46% are managers and 21% are director level and above

They are from a wide range of organisation size

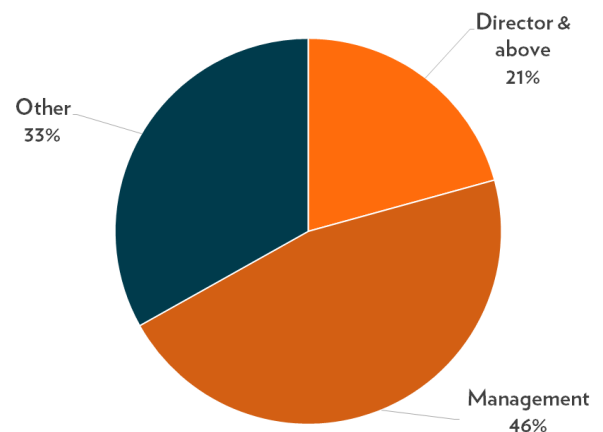
- 33% are from smaller organisations - <250 employees
- 21% from organisations of 1,000 to 5,000 employees
- 12% of respondents come were from organisations larger than 50,000 employees

The respondents come from a wide range of industry sectors, with some emphasis on Finance, Consulting, Software and Retail

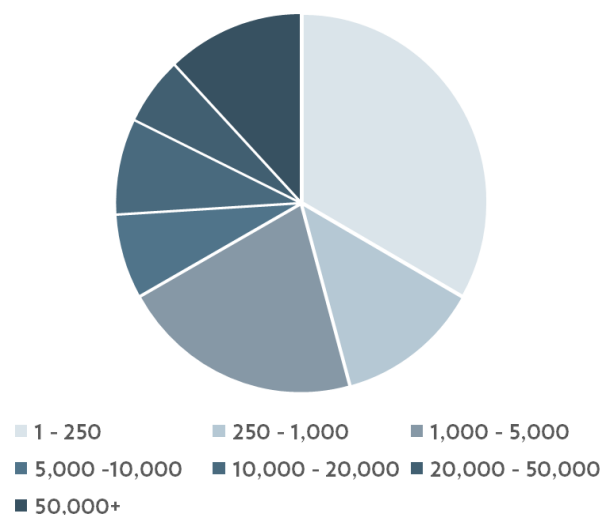
Respondents Region



What best describes your role?

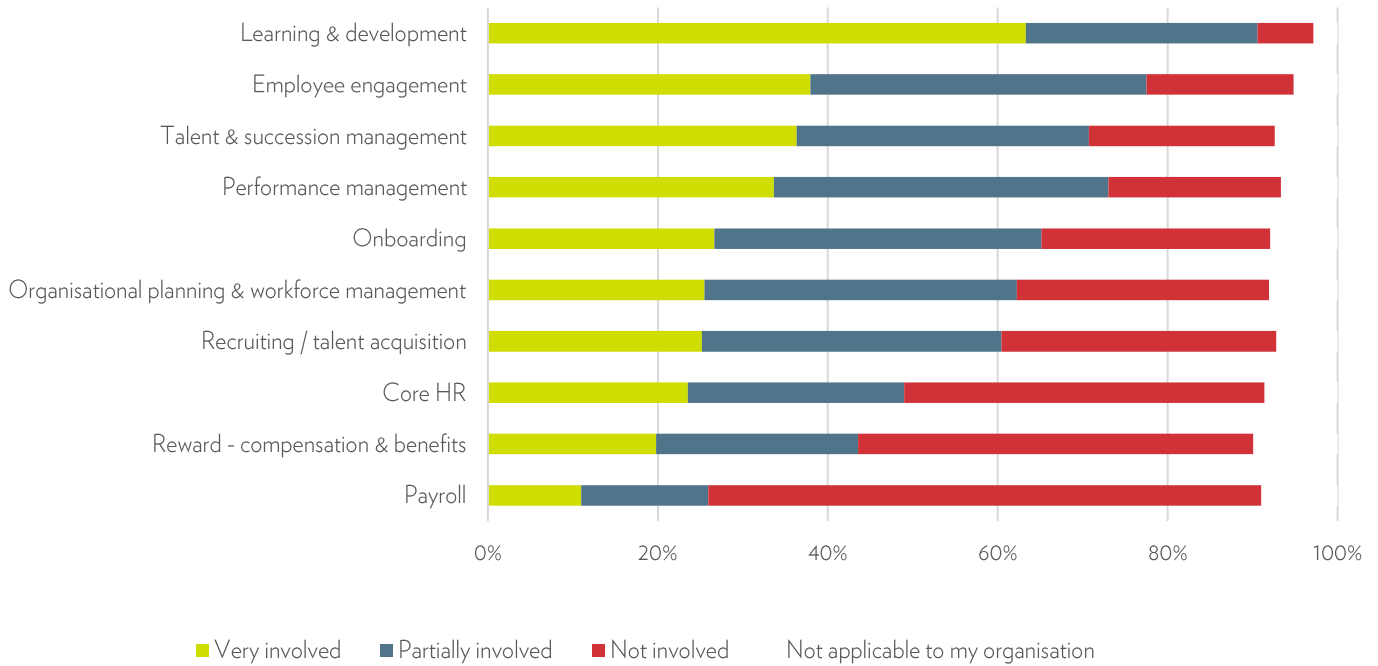


No. of Employees





What HR processes do you have responsibility for, or an active role in delivering in your organisation?



The respondents have a skew to roles embracing learning and development, employee engagement, talent and succession management, and performance management – roles associated with core HR, reward and payroll are less prevalent.



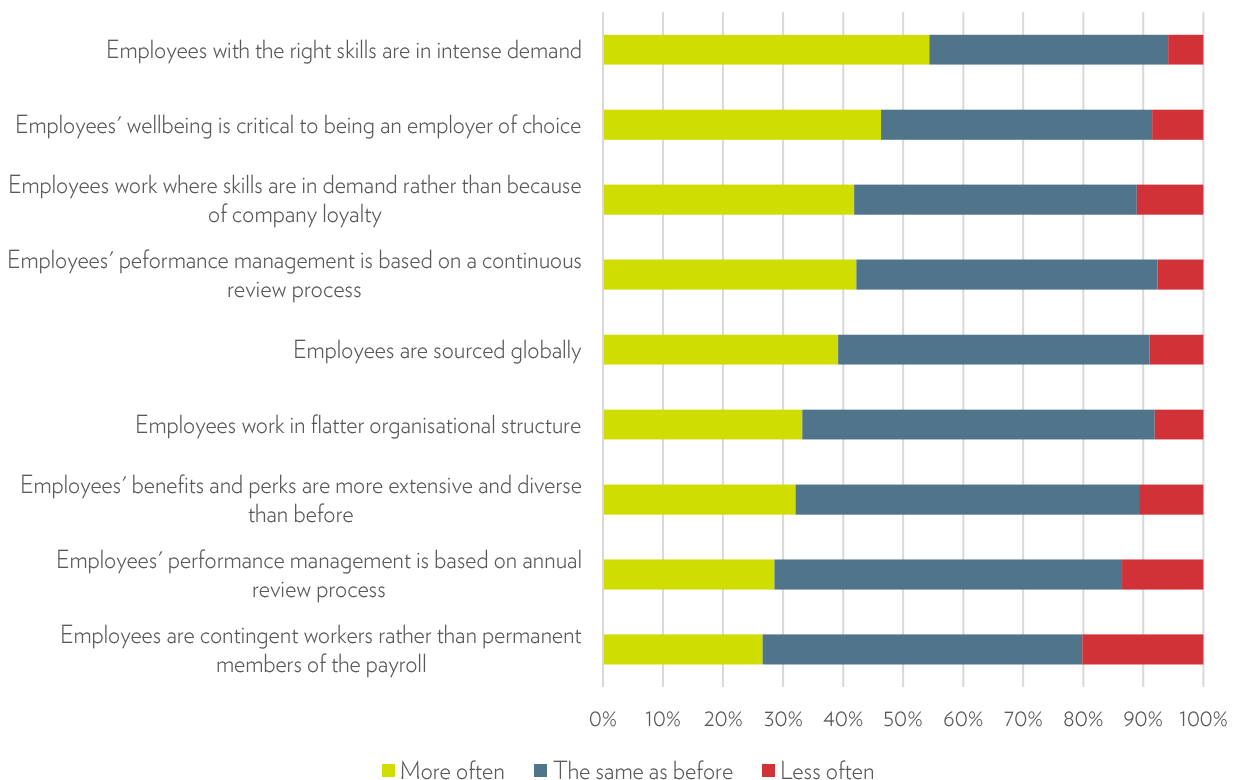
Introduction

David Rowan, the editor for Wired Magazine often says that:

“The world will never move this slowly ever again.”

This encapsulates the personal experience of many of us – a sense of organisations and work moving faster and faster. A digitally and technologically transformed world that is massively impacting organisations, work and the workforce. All the major pressures for changing work seem to be building ever greater momentum. When we asked our survey respondents whether they saw the following drivers of change happening more often, the breadth of change and challenge becomes clear for every role of the world of work – both for workers and employers.

How much is your organisation changing?





Whilst a small percentage of respondents are seeing some of these drivers less often, the overall net trends are all positive and it is important for HR to respond if their organisations are to ride the wave of change caused by the changing modern workforce and the future of work.

Technology is truly disrupting working practices – it is becoming more virtual, more collaborative using social tools, it relies on more and more self-service technologies, mobile devices, augmented technologies, artificial intelligence and uses more real time tracking of performance. Workers are connected 24/7. Of all of these elements, it's the virtualisation of work that stands out head and shoulders above the rest. 68% see the impact of virtual technology on their workforce more and more often.



68%
report that
employees use
technology for
more and more
virtual working

So, as organisations move faster, change more rapidly, work with more and more diverse teams (45%) more often, across a wider age demographic, and open up their organisations to more and more flexible working (30%) – how ready are organisations' talent management approaches to respond positively? How are these changes also impacting the expectations of the workforce? And what should organisations do to be successful in the future, where the more agile organisations are the ones that reap all the rewards?



45%
report that
employees are
more often
working in more
diverse teams

As one Director of a global manufacturer told us:

“The diversity agenda is more and more relevant, as is working from home and a 24/7 mindset. And we have to be able to support that.”



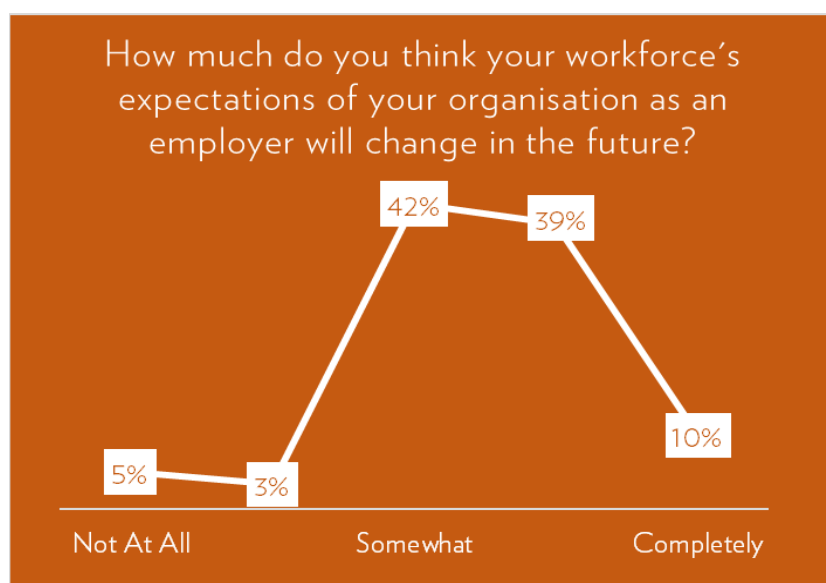
Changing Expectations

By 2020, half the working population are expected to be millennials according to this [PWC Report](#). But whilst much of the commentary of the past seven years has focused on how millennials will impact organisations and what organisations should do to attract the new workforce, it's been too easy to overlook the growing trend for people to work into older and older ages in their careers.

Nearly half of our research respondents confirmed that an aging workforce is a growing trend in their organisation and 45% highlighted that their teams were becoming increasingly diverse.

These trends create the challenge of managing more complex organisational demographics. When this is combined with the increasing speed and impact of technology, organisational success and agility becomes not just about harnessing the energies of newer entrants to work, but also about maximising those with more mature careers.

Against this backdrop, 95% of HR professionals in our research think employees' expectations of their employers will change in the future. And whilst only 10% think those expectations will change completely, this chart shows there is a strong recognition that things are certainly not going to stay the same. Especially as only 5% think employees' expectations are not going to change at all.





The important questions that comes out of this are how are the expectations of employers going to change? How does that affect HR's approach to talent management for the modern workforce? And what's going to be the most going to be the most important part of an employer's value proposition to attract, retain and energise organisational talent of all ages in the future?

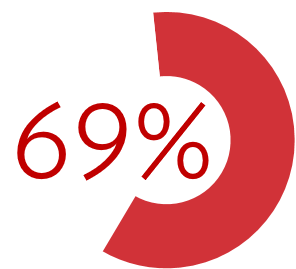
Employee development is expected to be the most important part of an employer's value proposition

When all the different aspects of an employer's future value proposition are considered, it's *personal and professional development* along with *career progression* that come out on top. These are expected to become even more important to the workforce of the future, than they are today.

Almost 70% expect personal and professional development to be more important to their future employees then it is currently. And almost one third see career progression becoming more important to the modern workforce than it is now.

Learning is clearly going to be top of the talent agenda in organisations going forwards.

Whilst there has been much focus put on informal learning – encompassed by models of 70:20:10 and the growing clamour for micro-learning – what should not be overlooked from this research, is the importance of complementary, more formal structures and strategies to support employees on their development and career journeys. Whether that is through formalised career structures or individual talent review cycles that encourage employees to manage their career direction and build their expertise. It's about more than having a development plan though, it's about investing in individuals' succession and progression, talent pooling and bringing internal employee mobility and talent management from the upper echelons and top tier talent, to the wider workforce.

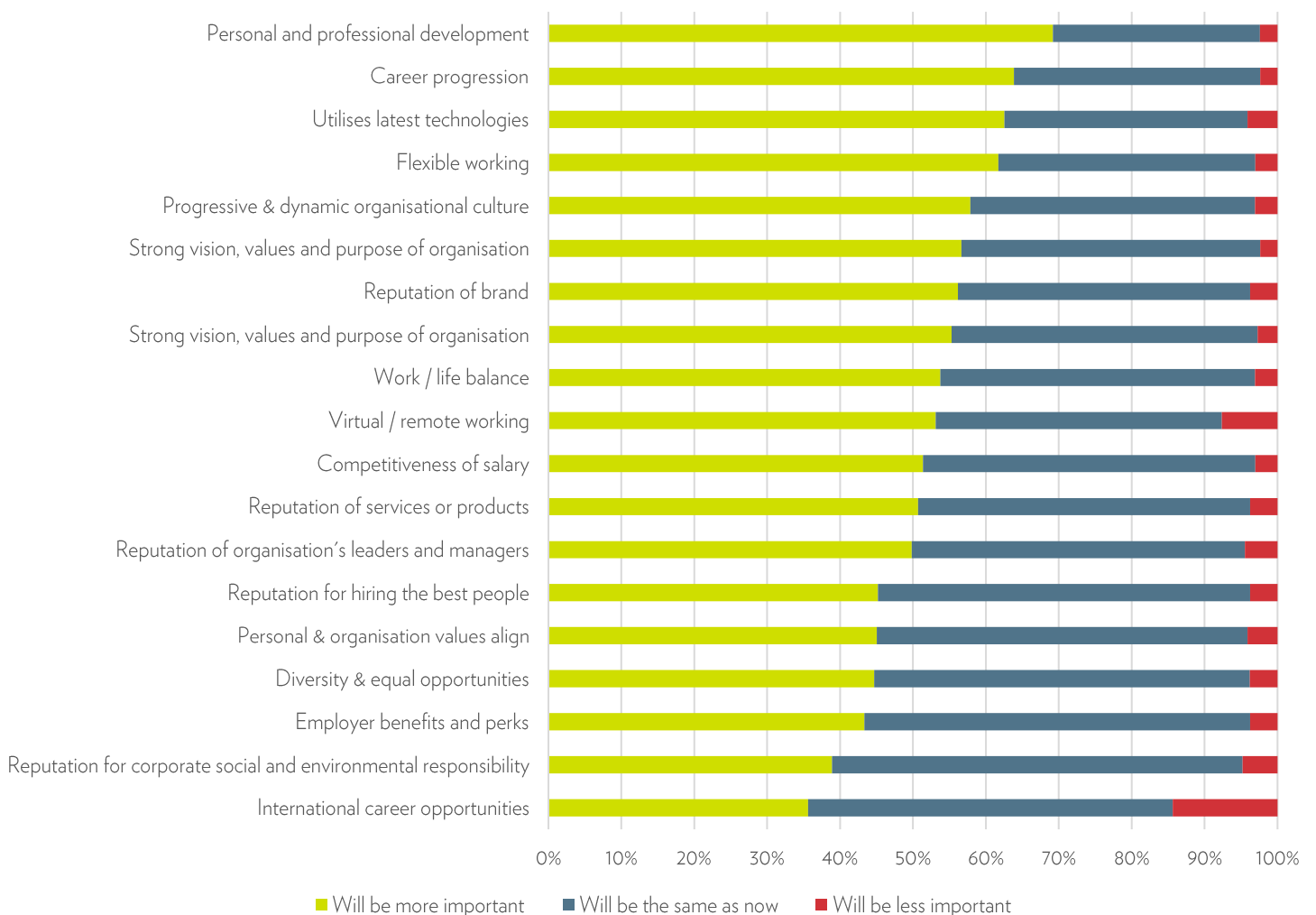


expect personal and professional development to be more important to their employees in the future



As the chart below shows, employee development and career progression are rated as more important than the swathe of factors embracing modern working practice, brand, reputation and organisational culture. Only 2% think personal and professional development will be less important to the workforce of tomorrow. But, whilst it's easy to look at that purely through the lens of employees' needs, it is also reflective of the significant challenges organisations face to ensure they have the skills they need to succeed in the future.

How important do you expect the following to be to your workforce in the future?





However, just recognising the importance of personal and professional development is not enough. The growing diversity of employees means greater divergence in how people prefer to develop themselves, as illustrated by this European retailer's Learning Manager:

"Our organisation is a 50/50 split between people who have been with us 15 years plus, and a new wave of younger hires. And they are definitely different. The ones who've been with us the longest typically like more instructor-led approaches and someone to ask. The new entrants don't seem to want any of that. They want to self-serve and don't think instruction is the first option. They just look it up. So, we're catering for both of these audiences to keep them engaged."

Key Takeaways

- Don't be distracted by millennials, the aging workforce is a growing trend.
- There is no status quo, 95% of HR professionals believe employees expectations of their organisations are changing.
- The personal and professional development organisations can offer their people will become a key differentiator in their employer value proposition.
- Learning needs to become a more strategic part of the talent agenda.



The Changing Workforce



87%

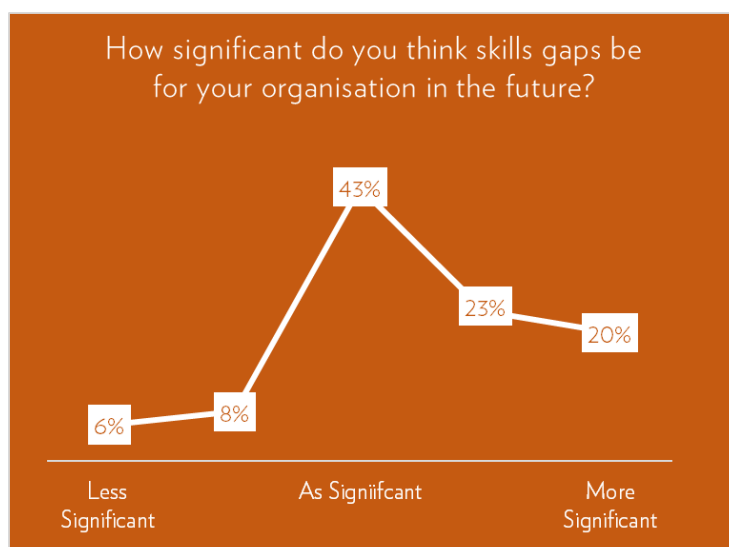
see skills gaps becoming as significant, if not more significant in the future

Skills gaps are becoming more and more significant

With 87% of research respondents highlighting that skills gaps are going to be 'as significant', if not 'more significant' in the future, the war for talent is going to intensify.

But besides seeking employees with the best people, with the right skills and attitudes, **employers** have a critically important role of developing those skills themselves!

Essentially, the best way of making sure that you are not increasingly fighting for ever scarcer resources, is to grow your own. Investing in your people is going to become essential for the success of organisations for tomorrow. This is not just about the jobs of today!





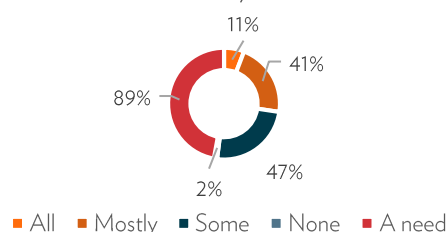
The steps that companies are taking to prepare for tomorrow typically come in waves of competency and capability frameworks and career planning. As we will come to see later in the report, our research indicates that there is still much work to do to bring these activities up to speed for the modern workforce. Especially when there are fundamental changes needed in organisations' digital product and innovative service models.

These gaps also put into context why HR professionals rate personal development and professional development high up the value proposition. They are central to creating a win-win for employee and employer – in a talent market where the skills are not readily available.

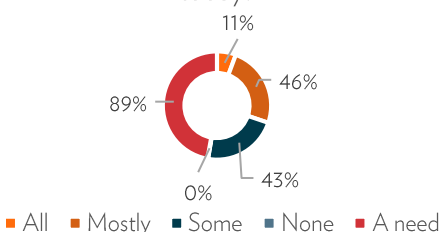
It's not just digital skills that are the problem

The lack of digital skills in the modern workforce has long been recognised. But they are not the only skills gap that causing a problem. Consistently, less than 30% of organisations in this research reported they have the all skills they need to succeed across all of the skills areas we asked them about, including their industry specific skills. In the most vulnerable areas of digital, soft skills, leadership and management and sales skills, less than 15% say they have all the skills they need to succeed today, never mind tomorrow.

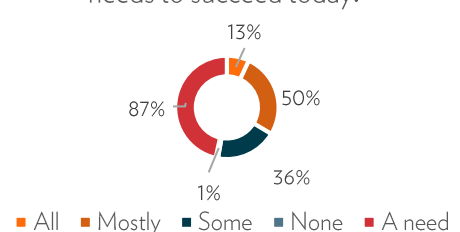
Does your organisation have the digital skills/capabilities it needs to succeed today?



Does your organisation have the soft skills/capabilities it needs to succeed today?



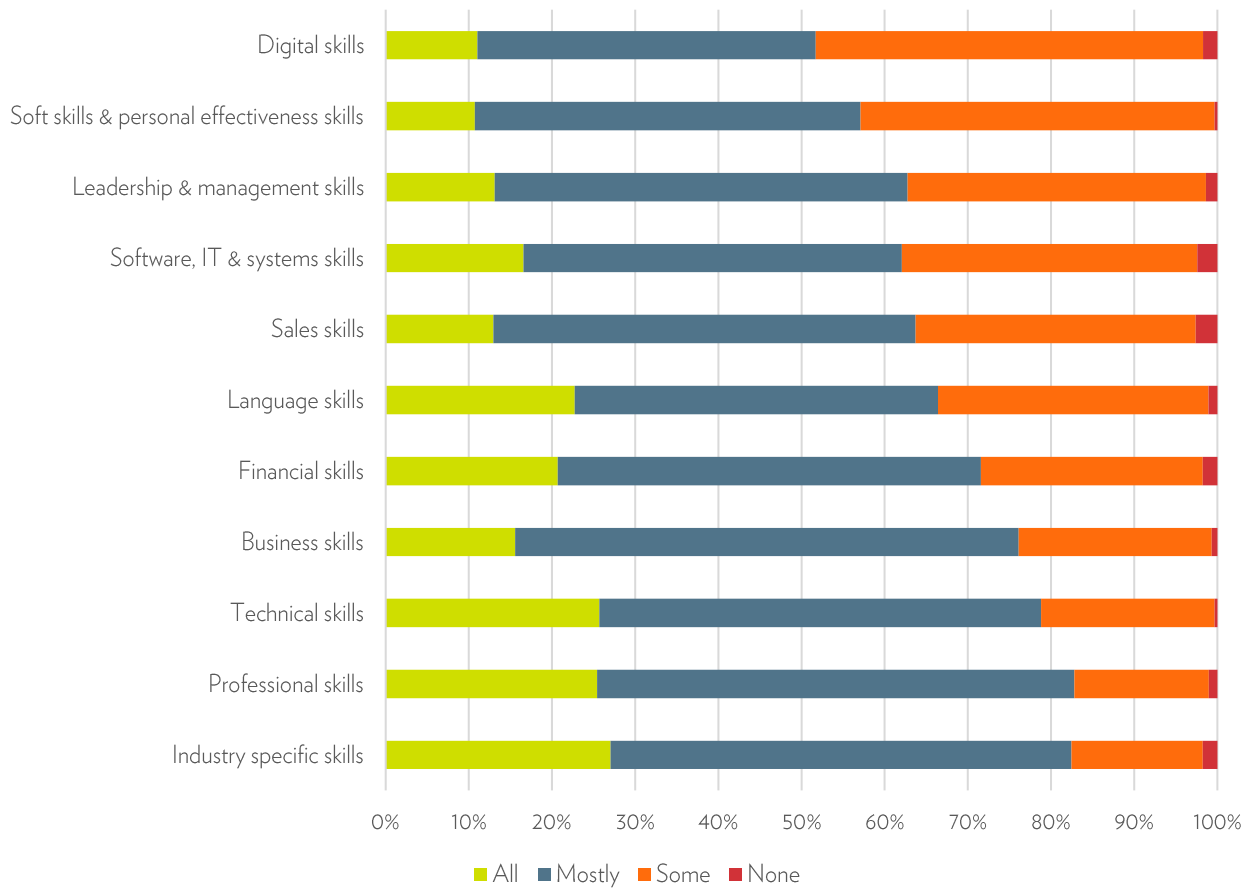
Does your organisation have the leadership and management skills it needs to succeed today?



Now, whilst it might be unrealistic to think that any organisation would have all the skills they need in these areas, it is a basic fact of life that people – and organisations – without all the requisite skills will find it harder to be successful. They have to peddle faster to keep up which creates internal pressures on employee advocacy, engagement, retention and overall organisational energy as they struggle to change at pace.



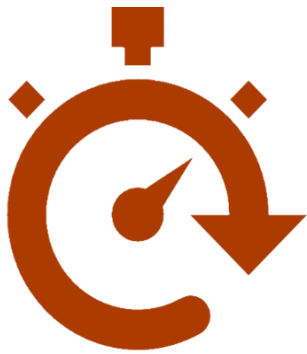
Does your organisation currently have the skills/capabilities it needs to succeed today?



So, even though often a large proportion of the respondents believe they have most of the skills they need to succeed today, any gaps still need to be plugged by learning and development if employees are to improve their performance and move at the speed of change required in modern businesses.



Employees needing to learn faster is one of the significant trends in modern working



67%

report that because of changes in work, employees increasingly need to learn faster

When HR professionals are asked about how work is changing there are some interesting links to the priority for developing employees' skills and capabilities. Top of the list and a clear driver for a learning led talent agenda, is the growing demand for employees to learn faster.

Around 67% of our survey respondents say that workers now need to learn – and get up to speed – more quickly than ever before.

Some of this is inevitably driven by the increasing agility demanded of employees themselves.

Nearly 40% see employees changing roles more regularly in the future. And without a doubt, as many HR professionals are aware, change is the number one driver of training and learning in organisations.

This compares to other significant changes in how and when people work. There is a growing trend towards increasing levels of flexible working, with around one third of respondents highlighting this happening more often.

Not only does this impact the learning methodologies and support through the talent cycle that HR provides for employees, it also has direct impact on the access required to the talent and learning systems adopted by organisations. Particularly as workers are now increasingly working anywhere and at any time.



30%

report that employees have more and more flexibility over where and when they work



One of the most significant drivers of this increasing working flexibility is the growth of virtual and collaborative tools and growing momentum for employee self-service.

Employees use technology for more virtual working



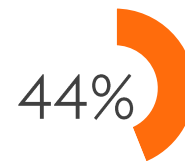
Collaboration and social media tools are key to working



Employees use self service to do their work and maintain their data



Employees work primarily using mobile devices



With these trends growing in day to day working practices, it should be no surprise that these tools are increasingly becoming a natural element of how HR operate their talent management processes.

Whether it is through mobile apps, or a more traditional laptop or desktop computer, talent management solutions for processes including performance management and learning have been a growing trend in HR technology.

In fact, it could be said that many of the innovations in HR especially around continuous performance management are in part a reaction to, and a driver of, more flexible working and are a natural evolution of more dynamic and free flowing organisational culture.



As a Head of Learning for a major international consulting organisation commented:

“The younger generation of employees, under 35, spend far more time on their phone than their older peers. If they need to know something they just Google it to look it up. They are very influenced by trending information and this is spilling over into how we treat them with our learning and talent management approaches.”

So, it's important to reflect on how HR has already changed to both keep pace with the shifting expectations of employees today and how they are moving to keep pace with the expectations they will have tomorrow.

But how ready are HR for the modern workforce?

Key Takeaways

- 87% see skills gaps becoming more significant in the future. The war for talent is set to intensify.
- Growing skills gaps underpin the high priority attributed to improving personal and professional development.
- Digital skills, soft skills and leadership and management are the worst affected areas.
- Where there are skills gaps, employees need to get up to speed more quickly. 67% report a need for their people to learn faster.
- Effectively harnessing talent and learning technology is key in enabling faster upskilling.



Changing Talent Management

How ready are HR for the modern workforce?

Performance management and appraisals show the most progress

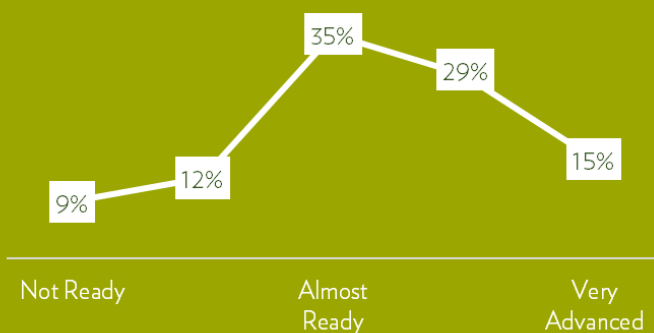
Of all the areas of talent management, it's *performance management* and *appraisals* that come out on top, and appear to be the most mature.

44% believe their performance management approach is ready for the modern workforce. Of these, a strong subset of the respondents - 15% to 17% - believe their organisations are 'very advanced'. For the vast majority however, there is still work to be done. Around half are either not ready at all, or still preparing their approach. Appraisals too, show a similar profile and again, can be seen as more mature in the perceived level of their future readiness.

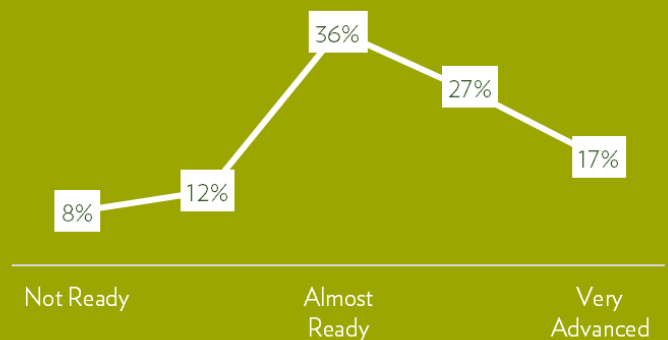


44%
report their
performance
management
approach is
ready for the
modern workforce

Performance Management



Appraisal Management





Learning and development is far from the finished article

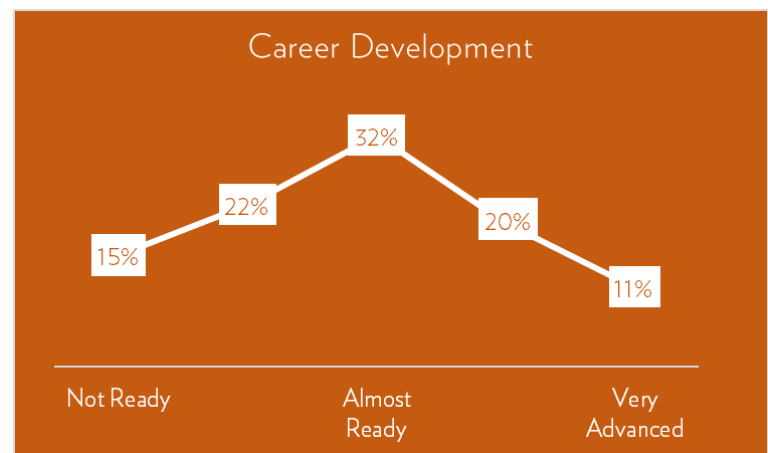
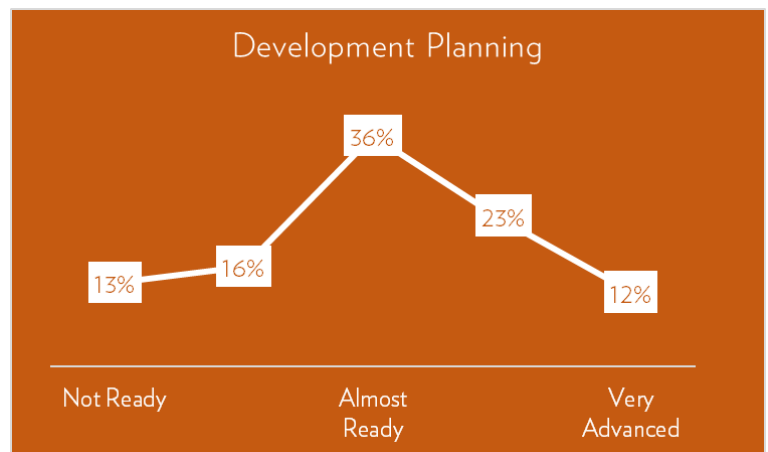
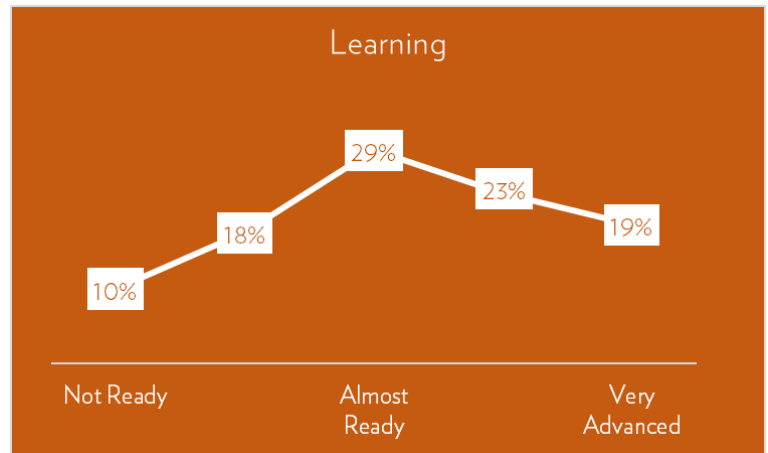
Despite all of the perceived progress in learning compared to other parts of the talent cycle, learning and development is far from the finished article based on the results of this research.

42% believe they are 'ready' or provide 'very advanced' learning – leaving almost 60% with more work to do.

Whilst progress with learning appears to be strong overall, when the other elements of development planning and career development are considered, the picture is not so healthy.

For career development, around one in 10 report that their approach is 'very advanced' which is about half of the number reported for learning. 69% still have work to do to be 'ready'.

Given the importance attributed to both the need to learn faster and to improving personal and professional development, highlighted as the top elements for organisations striving to improve their employer value proposition, time is pressing for HR to act and modernise their people development.





But developing people is not enough. If career progression is to be a reality, organisations also need the structures to recognise and harness talent internally. You need active talent mobility. And unfortunately, this is one of the least advanced elements of the talent agenda, based on these research results.



Internal talent mobility is the furthest from being ready for the modern workforce

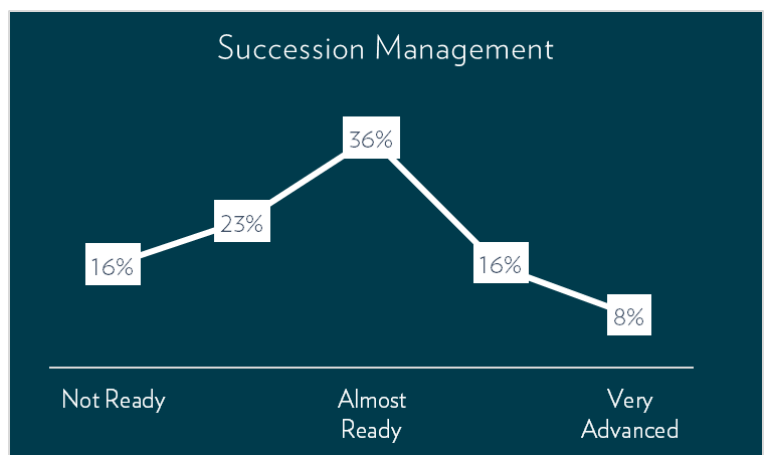
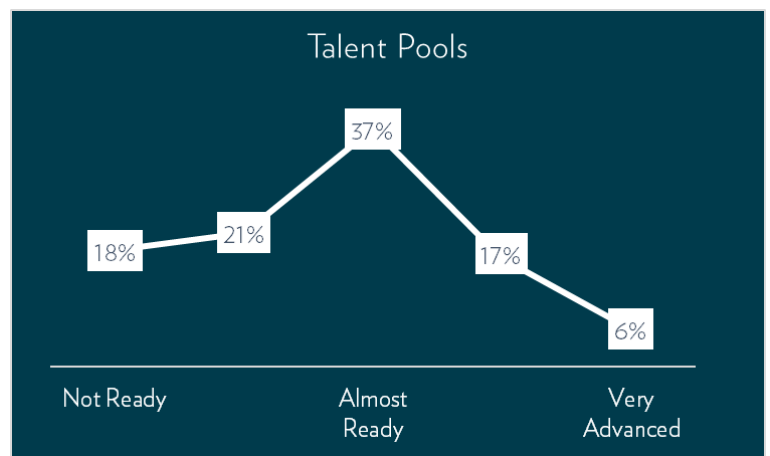
If the future success of organisations is dependent on optimising its workforce, making sure it has the best people in the right roles, being the best they can be – then one might reasonably expect organisations to have *talent pooling* and *succession management* at the top of their thinking.

Especially in a world of fast moving and dynamic organisations - where being agile with talent is so important both to the employer and the employee.

That less than one in four believe their talent succession and talent pool approach is 'ready' is potentially the most significant risk for HR in meeting the needs of the modern workforce. It is also an equally immense opportunity for the small number (6 to 8%) who are 'very advanced'.

How quickly the 36-37% who report they are 'almost ready' will achieve readiness is difficult to say. But of all the aspects of talent

Only **6%**
report that their
approach to talent
pools is very
advanced





management, it appears to be the most retrograde. And equally one of the most fundamental – especially when used as a proactive approach around the employees career progression themselves.

The approach of limiting succession planning as an exclusive preserve of executives and the most senior managers in organisations needs to end. It's a process which needs to become a much more accessible and emancipated if it is to engage with the needs of the modern workforce.

Key Takeaways

- Performance management and appraisals demonstrate the most mature future readiness across the full talent management lifecycle.
- Learning and development, and career development are not yet ready to deal with the demands of the modern workforce.
- With personal and professional development at the top of the agenda going forward, time is pressing for HR and L&D to act.
- And organisations need the succession structure and talent mobility to be able to progress their people. Currently, less than a quarter are ready.



Keeping Pace with the Modern Workforce - Next Steps

HR needs to mobilise stakeholders to accelerate talent management for the modern workforce

HR has to alert its key stakeholders to the risks of failing to modernise its approach to talent management for the modern workforce.

But if as we have seen here, the imperatives for changing talent management are so great, why are so many lagging behind in the race? What's holding them back? And what did the organisations who are more advanced have to overcome in order to take up their leadership positions?

The reasons are simple. People and organisations change when they feel the pain of not doing so. Or, the wiser ones anticipate the pain and move before it hurts. Essentially, in order to move from where you are today, you need a burning platform...

The challenge is that the size of the flames of the talent management platform for organisations are not always clear to see.

So, it should come as no surprise that the main barriers to organisations changing their approach to talent management, start with organisational culture. Other major barriers cited are a lack of organisational urgency around talent management and time constraints. It is a simple matter of priority. In only 16% of cases is organisational culture *not* a barrier to changing talent management approaches to make it more effective for the modern workforce!

88%

find other priorities &
time are barriers to
delivering the talent
management
solutions required by
the modern
workforce



- 88% find other priorities and time an issue
- 86% find managers skills and attitudes a major issue

And with this lack of commitment, comes under investment in change – with 82% reporting investment being a barrier to delivering the talent management solutions required by a modern workforce. With this in mind, HR's key role is to mobilise the commitment of its decision makers and stakeholders to act today and begin to transform their approach to talent management today – in order to be prepared for tomorrow.

Without this, HR will continue to find funding for change as a critical barrier to providing the talent management required to attract, develop and retain the skilled modern workforce they desire.

Employer brand, data, analytics and strategic influencing are HR's key levers for change

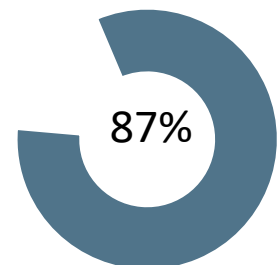
That's exactly what the research respondents highlight as the most important tools necessary for the future success of talent management in their organisation.

Employer brand, high quality data and analytics, and strategic influencing were rated as the top three most important enablers of future success. Neatly followed by closer integration between HR and the businesses it supports. The 'uberisation' of HR through chatbots, AI, and next gen systems is potentially one of the most significant changes to how HR is organised – which may change HR's dependence on the Ulrich model – like it or not.

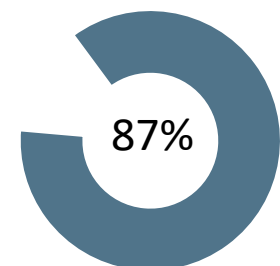
86%

find managers' skills & attitudes are major barriers to delivering the talent solutions required by the modern workforce

Employer brand and values



High quality data and analytics





So, technology plays a significant role in defining what talent management is and how HR will be organised to deliver it. Next generation technologies, HR and IT collaboration and quality HR systems all poll around 80% as 'critical' or 'very important' in driving the talent management approach of the future. And it seems, the HR organisations of the future as well. It's a trend we've seen consistently with other **HR surveys**, where agile, next gen talent technologies are seen as a critical enabler.

Consistently, around 80% see next generation technologies as a major lever in transforming HR.

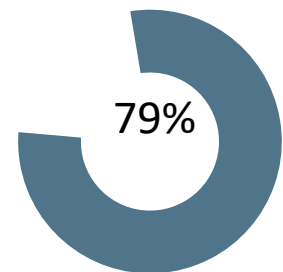
What is also fascinating is the importance placed on closer integration between HR and business systems. 79% see this as being critical or very important to the future success of talent management to their organisation. There appears to be a growing recognition that understanding talent and performance is really about understanding real business results and outcomes.

And that HR needs to be part of the day to day workflow of the workforce if it is to succeed.

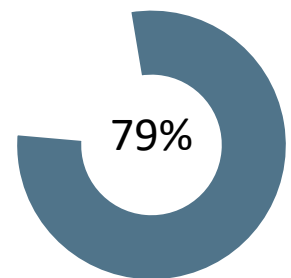
Siloed HR decision making is coming under pressure

Behind this data also comes some other strong messages, which could be interpreted as the decline, if not the demise of HR's siloed decision making. This was rated ninth out of 10 places in the list of useful tools for changing talent management to positively respond to the challenges of the modern workforce. In order to succeed with a holistic approach to talent management, it also appears that HR's different constituencies need to work together under a more holistic and joined up plan.

Strategic influencing skills in HR leadership



Closer integration between HR and business systems





One global Director of Learning for an international manufacturer, when asked about their journey towards a more joined up approach commented:

“For the first time, we have a company-wide business plan which takes us up to 2025, and this has provided a fundamental shift in focus for the HR team onto what is critical for that journey from our People Strategy. It helped break down some of the HR silos and gives us a common agenda and sense of priorities.”

Key Takeaways

- Transforming talent for the modern workforce is not solely the preserve of HR and L&D. Stakeholders across the organisation need to be mobilised.
- 86% report managers’ skills and attitudes a barrier.
- 82% report a lack of investment in change is holding back talent transformation.
- Closer integration of HR, talent and learning silos and technology is a key enabler.



In conclusion

In the race for talent, being ‘almost ready’ is not a good answer, especially when the availability of skills is so scarce. That this is the position for one in three organisations, and with often another one in three being even further behind, it’s clear to see that many will already be suffering from not seriously tackling their talent management agendas and making sure that their organisation can compete for the best people.

The biggest challenge for HR and talent professionals is not just they need to modernise their talent management approach, but to enable their organisations to realise that – whilst they may not want to accept it and whilst they are not feeling the pain of the burning platform that is the competition for talent – this is not something that can be left until tomorrow.

The preparations HR need to take to compete for the talent of tomorrow have to start today. Both through delivering a compelling employee value proposition to attract the the talent outside your organisation, but also start to build the talent within your organisation that it needs to ensure it performs.

These preparations take time, effort and cultural shift, and the leading organisations may already have left you behind if you haven’t already started.

As one of our interviewees commented from a technical service company:

“We understand we have a ticking time bomb around our demographics... but we’re not reaching younger generation in the service side of our business. This has the most vacant positions, but managers are struggling to come to terms with the challenge and our learning for those we do hire isn’t changing fast enough to keep the new generation of hires engaged - things are moving a bit too slowly...”



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Fosway Group's analyst and advisory services deliver the insights your organisation needs to achieve results and eliminate risk. We know that every aspect of next generation HR and talent are more intertwined than ever. When you work with us, you accelerate your insight and make better decisions.

We're Europe's #1 independent HR analyst, and just like the Roman road we draw our name from, you'll find that we're unusually direct. We don't have a vested interest in your technology or consulting choices. You can depend on us to tell you what you need to know to succeed.

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SumTotal Systems, LLC, a Skillsoft Company, is the world's only unified Human Capital Management Solution. SumTotal's award-winning Talent Management Suite enables companies to attract, know, mobilise, develop, progress and reward their workforce. SumTotal is continuously innovating to best meet the market challenges of attracting, retaining, developing and engaging the multi-generational workforce. The Talent Expansion Suite includes three key components – Talent, Learn and Work.

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