

# 2014 HRO Today Services and Technology Association Awards

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## Programme of the Year

### **Bank of Ireland and Accenture – EMEA Learning & Development Programme of the Year**

**Bank of Ireland**



  
High performance. Delivered.

#### **A summary of why this customer relationship should be considered for the award**

The learning partnership—Learningzone—that Bank of Ireland Group (“the Group”) and Accenture built in 2006 continues to generate valuable results for the client and learning overall, winning local and European industry awards. It also demonstrates the flexibility, scalability and adaptability essential for the Group to respond swiftly to new business challenges and to execute corporate strategies.

The year 2013 was no exception. That year, Retail Ireland—the Group’s retail branch network—underwent a major restructuring/rightsizing initiative that called for a new approach to capability development. The traditional, instructor-led classroom-training model no longer worked. With fewer employees shouldering more priorities, web-based training became critical.

Learningzone developed a new training model to achieve an aggressive goal: 80% web-based and 20% instructor-led training. With this mode, division employees now have more flexibility in how they fulfill training imperatives—enabling them to be more productive on the job while continually building their skills.

#### **At least three significant problems or issues that the buyer and provider together overcame in the course of delivering service and the methods or practices used**

Bank of Ireland Group is a diversified financial services organization that employs more than 12,000 staff predominately in Ireland and the United Kingdom. The Group provides a wide range of personal and commercial financial services through its branch network in Ireland, its telephone and online banking service Banking 365 and its joint venture with the British Post Office.

In 2005, the Bank of Ireland defined a strategy centered on growing organically in its domestic market, strengthening its offshore business in the United Kingdom and expanding its portfolio of niche businesses internationally. To achieve these goals, it needed a more competitive, lower-cost operating model to release capital for further investment.

One opportunity to support this effort involved reconfiguring the Group’s learning model. At the time, the model was labor-intensive, expensive and outdated. The bank had multiple separate training units embedded in its different divisions and business units. These were locally controlled, with little cooperation or communication between them. As a result, the bank was experiencing considerable duplication of cost and activity, inconsistent policies and operating models, and lack of strategic alignment. Indeed, anytime Bank of Ireland expanded or absorbed another business unit, another training unit was simply bolted onto the organization adopting the same decentralized learning model.

Moreover, the learning model over-relied on classroom-based activities and thus was outdated—unable to gain the advantages (such as time and cost efficiencies) offered by more modern approaches. The model also lacked internal benchmarking, enterprise-wide standards and best-practice sharing. This was problematic, because the banking industry was experiencing increased regulation focused on employee certification and qualification, with continuous professional development becoming the norm. Industry players needed training solutions—especially aimed at teaching new selling techniques—that could be adopted and implemented speedily, as well as mechanisms for tracking, reporting and testing training effectiveness.

To surmount these challenges, Bank of Ireland set out to build a single group-wide learning model. The solution would need to be scalable, flexible and adaptable, and would involve a sweeping transformation of the bank's learning function. It would have to provide high-quality and consistent training, be timely and cost-effective, give employees better individual control over their career development and align with the Group's strategic objectives. In addition, the new model would have to be externally proven; provide an end-to-end solution; deliver a comprehensive, group-wide role-based training curriculum; and be "future proof" in terms of equipping the Group with the skills needed to maintain a world-class learning organization. Ultimately, this learning organization would be the driving force enabling employees to build the skills and knowledge required to deliver desired business results. Bank of Ireland considered several possible solutions, one of which involved centralizing all of its training units. Yet this approach would require a major cultural shift within the Group's learning community—as well as development of a strong business case for significant investment in key supports such as IT infrastructure.

Consequently, Bank of Ireland decided to outsource the effort to a strategic partner who would help create the new model and support the required cultural shift to a single group-wide approach. The partner would also be expected to play a major role in building the required capabilities and learning management system (LMS) infrastructure (including a platform for group-wide e-learning) at the same or lower cost as the combined cost of having the multiple separate learning units throughout the Group.

In 2006, Bank of Ireland selected Accenture to serve as this strategic partner.

### **The approaches and/or programs initiated through the relationship and how results were measured**

The strategic partnership between Bank of Ireland and Accenture was named Learningzone. Under the Learningzone banner, Accenture has been providing a comprehensive range of capability development services including:

- A curriculum of 400-plus training programs
- End-to-end capability service including training needs analysis, administration and operations, provision of an learning management system (LMS) and learning infrastructure, management, evaluation and reporting
- Design, development and delivery of training programs via the classroom, web, mobile technology, phone and provision of on-the-job guides and supports
- Access to online libraries and resources
- Support for external training programs, as well as third-level education, which is closely linked to the Irish Institute of Bankers Education Framework that is accredited by University College Dublin.

Initiated in 2006, Learningzone strives to bring a best-in-class learning service to all of the Group's employees worldwide. It delivers training services to staff based in Ireland, the United Kingdom, Europe and the United States.

Key elements of Learningzone include:

- A partnership approach, with Accenture establishing a Learningzone brand, location and team
- An enterprise-wide learning model
- A retained Bank of Ireland learning organization
- Three main training centers: Dublin, Belfast and Bristol
- A dedicated business partner relationship management model
- An LMS that provides an IT platform and infrastructure for group-wide e-learning as well as learning administration
- A professional content development team that includes locally-based Dublin learning architects as well as an offshore Content Development Center
- Call-center support for learning (open from 8:00 a.m. to 8:00 p.m., five days a week)
- Instructor-led training, virtual learning technology and e-learning delivery
- A role-based training curriculum
- A combination of generic, customized and bespoke training content.

Learningzone comprises four teams:

- The Learning Business Partner Team focuses on learning planning, including aligning the Group's learning needs with business objectives.
- The Learning Design & Development Team concentrates on building, buying and reusing learning content.
- The Learning Delivery Team is responsible for planning and delivering learning across a mix of media, based on licensed or subscription-based technology infrastructure.
- The Scheduling and Operations Team handles scheduling and logistics across Bank of Ireland, including course catalog management, learning tracking, help-desk operations and measurement of training program effectiveness.

The comprehensive curriculum developed and delivered by Learningzone includes programs such as:

- Leaders Edge—leadership and management capability programs comprising instructor-led training and web-based training (WBT) modules
- Manager Toolkit—a suite of web-based courses sourced and licensed from a global tier 1 university
- Learning Academies—for Bank of Ireland’s Finance, Procurement and Change teams
- Masterclasses—sessions delivered by external experts on a variety of topics aligned to the Group’s business strategies and challenges

Learningzone also leverages technology to reinvigorate the different ways employees learn. It has extended the classroom from a “once and done” approach to a “just in time” approach by using an alternative, flexible delivery channel that learners can access at any time, with minimal effort and at the touch of a button. The LMS is key to this effort, providing individual learners with access to a self-service model. Through the LMS, they can find information about available learning opportunities, assess course descriptions, register for instructor-led courses and take web-based training modules. The LMS also tracks learning completions, enabling Bank of Ireland to gather valuable data to track progress against learning plans.

In addition, Learningzone has found new ways to reach and engage with learners, including building a training app for smartphone users and a Managers Pocket Guide covering topics such as coaching, innovation and creativity. A pipeline of other topics has been created, which employees can access remotely. This provides better individual control over career development and minimizes disruption to employees’ workdays by reducing the need for travel and for time spent away from the job to attend classroom sessions.

Bank of Ireland and Accenture further worked to ensure Learningzone’s success by developing a powerful communications campaign to build understanding of and demand for the new learning opportunities. Campaign initiatives included:

- Learning forums where managers and their teams could discuss learning requirements, identify challenges and recognize successes
- A peer-to-peer thought leadership newsletter emailed to managers that discusses business and leadership challenges, provides articles written by recognized leadership and industry resources, and directs managers to internal training resources
- Newsletter for all staff that highlights new and interesting courses, keeps staff apprised of key deadlines and provides articles of interest
- Learningzone “roadshow,” a customized event attended by managers that provides opportunities to focus on how their role powerfully affects the Group’s ability to build critical skills and knowledge and that facilitates discussion on available training resources

### **How the relationship has contributed to advancing the practice of HR transformation and/or HRO**

In today’s fluid and challenging business environment, we believe that a sustainable learning organization needs to be built on the three principles of flexibility, scalability and adaptability—and that these principles apply to all industries, not just banking and financial services. Learningzone has shown that organizations that run their learning service based on these principles can cope with any business requirement or rightsizing efforts. For instance, during the most recent financial crisis, Learningzone managed to innovate its learning model, pioneer and expand its use of mobile technology for training delivery, continue to invest significantly in the development of employees and managers, deliver volumes on a variety of business priority programs, accredit and certify programs, engage in a number of strategic partnerships, and provide training to support staff and customers.

Recent deployment of Learningzone to address challenges in Bank of Ireland’s Retail division provides an apt example of the learning model’s power. Retail Ireland is the branch network division of Bank of Ireland in Ireland. In 2013 Retail Ireland implemented a new branch model, transforming branch banking and redefining the role and size of its workforce and staff. The new branch model focused on enabling staff to work more efficiently and effectively, improving processes and removing transactional work from the branches with the overall objective of providing an enhanced experience for customers. This transformation resulted in a significant reduction of staff in front-line retail locations.

Under the old structure, there was always sufficient level of cover for staff members released from their locations to attend training courses. Owing to the tighter staffing ratio, there was now less flexibility. However, the demand for training had increased because of the level of transformation unfolding across the network. Moreover, capability uplift solutions had traditionally been met via instructor-led training. But individuals were being sent to such training with very little pre or post discussions on the capability gaps underpinning the development need.

Applied in this division, the Learningzone model had moved from 99% instructor-led training in 2006 to a 60% instructor-led and 40% web-based training (WBT) mix by 2012. The division needed to rethink learning delivery channels to meet its changing needs. The division requested a shift to an 80% WBT and 20% instructor-led model. Achieving this goal would hinge on innovative use of technology.

Investigation revealed that the division wanted 80% delivered remotely—web-based training was the only channel it had considered. Learningzone developed a blended approach comprising three components:

- Continuous (20%)—where a core skill has been identified, individuals can undertake a series of Learningzone interventions and ongoing line-manager coaching throughout the year. Key delivery channels: WBT, iPhone and other technology supports accessed remotely or on the job.
- Campaign (20%)—for measurable business specific initiatives, with specified timeframes, where learning has a clear role to play, delivered through Learningzone and business-led interventions. Capability development is measured through impact on business metrics. Key delivery channels: WBT, iPhone, conference calls and other technology supports accessed remotely or on the job.
- Classroom (20%)—for staff who have completed continuous and/or campaign technology-based interventions and who would benefit from further formal development in a classroom environment. Examples include people who are new to their role, for whom classroom is recommended for individual development plan or whose development requirement is in a complex area where continuous and campaign technology are not relevant. Key delivery channel: classroom.

This approach led to a combined 80% of training accessed through a blend of technologies and the remaining 20% via traditional classroom methods. The overall network objective of moving from 40% WBT to 80% remote through technology had been achieved.

The partnership between Bank of Ireland and Accenture continues to result in innovations in how Learningzone delivers training, and enables the Group to stay up to date with new learning tools, techniques, methodologies and technologies.

The Learningzone partnership has developed to such an extent that it also now provides training (in areas such as small and medium size enterprise business success) for the Group's customers – further advancing the practice of learning external to the organization and directly strengthening customer loyalty to the Bank of Ireland's brand.

Learningzone's achievements have attracted attention from other organizations in a variety of sectors, including public service, banking and media, within both Ireland and the UK. These organizations have sent teams to visit Learningzone, to see how the learning teams operate and to further explore the partnership's innovations and draw lessons that can be applied to their own organizational challenges.

**One or more testimonials from the purchaser of services and/or a third party (e.g., external to either nominated organization) providing evidentiary confirmation of the nomination**

“Since 2006 we have worked in partnership with Accenture to deliver our learning service called Learningzone. This partnership has brought us capability, expertise, scale and access to an extensive range of resources through Accenture's proven outsourcing model that we would not have on our own. It drove a step change in our learning capability, establishing a best-in-class learning curriculum, achieving a successful shift to web-based and mobile learning and brought a robust business management approach to our learning governance and management information. Accenture's unique range of services combined with our own background in learning within the financial services industry has produced a highly innovative, business-results and learner-focused service that is greater in value and business impact than the sum of our two parts. The effectiveness of our partnership has been proven to have the flexibility, adaptability and scalability to deliver best-in-class learning services in a high-growth environment . . .”

Eamonn Eaton, Head of Group Learning & Engagement, Bank of Ireland.

**Be sure to provide details around the nominee's impact and the resulting outcomes, using specific numbers and metrics (where possible)**

In addition to successfully introducing e-learning to Bank of Ireland, Learningzone consistently delivers high-quality instructor-led training programs focused on the Group's strategic priorities. Recent innovations include programs to help small and medium size enterprise customers build capabilities to manage their business operations, programs

for staff supporting the Group's corporate social responsibility efforts and an executive coaching program designed through a collaboration between Learningzone and MaST, whose services focus on maximizing business and people performance.

In keeping with the notion of continual improvement, Learningzone has also developed and deployed a wide range of new courses spanning disciplines such as Credit Management, Sales and Customer Service, Compliance and Leadership Development. Furthermore, the partnership has supported the Group's efforts to leverage technology more effectively in its learning organization. For example, shifting the overall training curriculum from 99% classroom based learning to 80% of training accessed through a blend of technologies with the remaining 20% in classrooms has enabled Bank of Ireland to offer its curriculum to a larger range of participants, providing high-quality, timely, consistent and cost-effective learning to the workforce.

Moreover, Learningzone has fostered a stronger sense of responsibility for their own learning in the Group's workforce. Employees are moving from a culture of being "told" what training to attend to now taking individual ownership of and responsibility for their own training and development needs. Learningzone's LMS has played a key role in this progress. The LMS is used to schedule, track and administer all training taking place at Bank of Ireland. All employees can access the LMS online and view the training catalog, which was created based on core banking and management competencies. Employees can view and select available courses and then register for relevant training.

Learningzone has helped transform learning at Bank of Ireland by combining delivery of a high-quality curriculum with effective measurement, evaluation, recording, reporting and IT systems. A major uplift has been achieved in the quality, consistency, rigor, governance, design, development, delivery and evaluation of programs. In addition, a 30% reduction in the annual cost of learning has been achieved.

To sum up, Learningzone has delivered:

- One high-quality, consistent and externally proven learning model aligned to the Group's business strategy and objectives.
- A group-wide, end-to-end solution available 24/7 through classroom, web-based, mobile, social learning and conference call channels.
- Leadership and management learning that supports the Group's pursuit of its priorities and strategies, certified by a leading university to enable participants to earn up to a post-graduate level degree.
- A comprehensive, role-based curriculum for 14,000+ employees, bringing a business management approach to learning needs identification, program design, governance and the tracking and reporting of management information.
- A learning function that is run like a business, with service-level agreements, tracking, measurement, evaluation, governance and reporting.

The year 2013 saw continued success, with measurable results including the following:

- 65,000 web training modules were taken
- 1 new learning program was designed per week
- 630 employees attained Approved Product Advisor designations
- 100 employees received Qualified Financial Advisor Status
- 45 managers graduated from the University of Coventry with post-graduate professional certification in Managing and Leading People
- 1,750 employees accessed the Learningzone site every month
- 530 individuals from customers and representatives from the Group's charitable partners attended classroom courses
- 4,700 web-based modules on regulatory compliance were accessed by third-party providers

## Programme of the Year

### Gas Natural Fenosa and Accenture – EMEA



#### **A summary of why this customer relationship should be considered for the award**

The relationship produced a new Employee Care Service that Gas Natural Fenosa's HR director views as the culmination of the company's HR transformation and the service that "crystallizes" its commitment to employees. This service supports strategic objectives, such as enabling the client to detect and quickly address inefficiencies in HR processes and improve data quality in its HR SAP system. Results include a 28% increase in employee satisfaction, 50% improvement in process efficiency and 58% decrease in employee-care FTEs.

Furthermore, the model can be customized for companies in other industries that have a shared services model and large workforces. It also provides valuable lessons regarding critical success factors for any organization considering a large-scale HR service or technology transformation effort.

Finally, through this model, HR has become a strategic partner in the organization and is leading employee-oriented transformations in other corporate areas.

#### **At least three significant problems or issues that the buyer and provider together overcame in the course of delivering service and the methods or practices used**

Headquartered in Barcelona, Gas Natural Fenosa is a leader in the energy sector, created through the merger of two major players in the Spanish market (Gas Natural and Unión Fenosa). The company has operations in 25-plus countries, offering services to more than 20 million customers on 5 continents, with 16 gigawatt installed power, a diversified mix of electricity generation and net annual turnover of US\$33.8 million. The company employs about 17,300 people.

In its plan for 2010-2014, the company defined three major strategic challenges:

- Strengthen the balance sheet with debt reduction.
- Foster internal optimization in support areas and business management.
- Increase the business by driving international presence.

To help address these challenges, Gas Natural Fenosa's HR organization created a plan to improve workforce performance and productivity, align its employee engagement model more directly with its customer model and manage operational budgets more effectively.

To accomplish this, the HR organization needed to address several challenges of its own, further complicated by the increased complexity resulting from the merger. These included the following:

- A lack of intuitive, self-service capabilities, resulting in a high number of employee HR-related inquiries about issues such as payroll, benefits, training and job opportunities within the company.
- The need to more effectively and efficiently embed the workforce's innate complexities into the company's processes and ongoing operations—such as 22 unionized labor groups in Gas Natural Fenosa's Spain operations alone, each with different payroll, benefits and labor-condition policies.
- A decentralized and uncoordinated HR operating model leading to redundant infrastructure, management teams and HR processes.

Owing to these issues, HR teams lagged in their response time to employee requests. Employees were often passed from contact person to contact person in search of a resolution. Moreover, when HR was able to respond to employees' queries, responses could be inaccurate and inconsistent.

Not surprisingly, employee satisfaction was eroding. To address these concerns, the company's HR function set out to implement a new Employee Care Service Model aimed at achieving the following:

- Become a strategic ally for the overall company by providing a powerful service that could respond quickly to new needs, support deployment of strategic campaigns and support corporate transformation efforts by (for example) orienting employees to new policies.
- Maximize HR efficiency by improving process controls, harmonizing and redesigning HR processes, increasing self-service and eliminating redundant technology investments.
- Improve HR service effectiveness by (for example) making services more accessible to employees and embedding union and regulatory requirements into corporate and local processes.
- Measure HR service outcomes by objectively measuring the quality of employee care services, adherence of HR specialists to established procedures and trends in employee satisfaction to identify opportunities for continual improvement.

In 2009, Gas Natural Fenosa reached out to Accenture to draw on its expertise in HR management consulting, technology and business process outsourcing to develop a solution to these challenges.

### **The approaches and/or programs initiated through the relationship and how results were measured**

Accenture recommended a three-pronged transformation plan for Gas Natural Fenosa:

- Consulting for design of the conceptual model for a new Employee Care Service and its services, channels, target audience, roles and responsibilities—and for implementation and ongoing management of the new model.
- Technology for set-up and ongoing management of infrastructure and applications.
- Outsourcing of the Employee Care Service Contact Center to operationalize the change and drive value for employees and the business.

The new Employee Care Service Model's design was based on these guiding principles:

- Focus on employee self-service. Gas Natural Fenosa's "Our People" intranet was totally renovated—updated with current, tailored and useful information and redesigned for more intuitive navigation and shortcuts to key content.
- Systemized resolution. An exhaustive database of more than 600 frequently asked questions (FAQs) was combined with detailed resolution flows for all types of requests according to a four-tier structure (described below).
- Multichannel, tailored contact. Employees can reach the Contact Center through multiple channels depending on their preferences and the complexity of their request. Channels include phone, intranet, website (sae.online), email, and external and internal mail.

The new model provided one multichannel point of contact for active employees (individual contributors, managers, executives and expatriates) as well as retired employees and other beneficiaries to submit requests, including:

- Inquiries seeking information about compensation, benefits, training opportunities, performance evaluations and job mobility
- Requests for specific transactions; for example, booking a reservation at a holiday resort that the company makes available for its employees
- Submission of complaints or incidents related to areas such as payroll taxes or employee discounts

Gas Natural Fenosa and Accenture defined the HR service catalog for the new Employee Care Service—codifying 240-plus types of employee requests to be accommodated and identifying specialists best suited to respond to each type.

As part of this effort, answers to more than 600 FAQs were documented through workshops with HR specialists and analysis of collective labor agreements. This number reflected the complexity of the union environment. For each type of question, "standard answers" were developed and specialists identified for answering a question if a standard answer was insufficient.

Finally, Accenture worked with Gas Natural Fenosa to select and implement a technology solution that would best equip the new service model to achieve its mission:

- Avaya for contact center telephone service (which included welcoming and HR menu, call addressing and service quality reporting).
- SAP portals to empower self-service through the "Our people" intranet.
- SharePoint to display static content. While this technology was already in place, the index and contents were reviewed for usability, relevancy and currency.

- BMC Remedy, whose capabilities were adapted for HR services. This solution enables the client to record and track end-to-end details about every employee request—such as duration, specialist involved, how often (and which) cases need to be reopened and individual employee satisfaction.

The new service's workflow model comprises four request-resolution "tiers," each tailored to accommodate increasingly complex requests and backed by specific technology:

- Tier 0—Self-service: Employees find useful information about matters such as payroll, training sessions or professional certification programs and can request transactions (for example, to change shifts or move to a different position in the company). Technology: SAP Portals & SharePoint
- Tier 1—Contact-center representative: Employees use phone, website or mail to contact an HR-specialized contact center, managed entirely by Accenture HR BPO. Technology: Avaya for contact center, BCM Remedy "SRM" for case management and "KM" for knowledge management
- Tier 2—HR specialist: When required, the Contact Center relays cases to HR specialists (on staff at Gas Natural Fenosa or provided by contractors). Technology: BCM Remedy "SRM" for case management
- Tier 3—Center of expertise: When necessary, cases are relayed to HR specialists in charge of defining or updating policies. They resolve the cases and, if necessary, update FAQs and procedures for the rest of the HR community. Technology: BCM Remedy "SRM" for case management

Results of these efforts were measured according to criteria including employee satisfaction (26% improvement), cost (58% savings), process efficiency (50% improvement), service quality (agility, speed and accuracy), knowledge management, and extent of use of the new service.

For example, Tier 1, the Contact Center, is currently resolving more than 70% of all requests for information. It also manages back-office tasks such as:

- Outbound calls to employees to gather information related to their requests.
- Daily reports on concerns for HR business areas.
- Additional training and support for specific change programs.
- Management of additional volumes arising from an increased number of requests about new HR policies.

### **How the relationship has contributed to advancing the practice of HR transformation and/or HRO**

The relationship between Gas Natural Fenosa and Accenture has advanced the practice of HR transformation in several ways. Specifically, it has demonstrated the power of intangible relationship qualities (such as trust and open communication) to deliver tangible, measurable business outcomes for clients and to foster long-term partnerships that generate value. Such value takes the form of process efficiencies and enhanced capacity for clients to achieve their strategic objectives. In Gas Natural Fenosa's case, such objectives included:

- Strengthening the balance sheet with debt reduction.
- Fostering internal optimization in support areas and business management.
- Growing the business by driving international presence.

As Miguel Ángel Aller, Human Resources Director at Gas Natural Fenosa explains: "Accenture has been with us as a partner from the beginning of the transformation process. Their extensive experience in major transformations in the field of human resources and extensive knowledge of the function have helped us in strategic thinking and in setting a challenging [but] realistic roadmap to address the centralization of the area as well as the identification of value to employee[s], which we have subsequently put in place.

Knowing trends and successful practices in other companies is of high value for us when facing our internal transformations. In this sense, Accenture has provided us with a rich and valuable external vision for our reflection of end-to-end models through [its] extensive international network of specialists in multiple disciplines (HR, Business, Technology, Outsourcing).

[Accenture's] ability to provide an integrated multidisciplinary solution and its guaranteed commitment have been key to addressing the design and construction of the new model of the Service Employee in 2012."

Indeed, the Employee Care Service program generated valuable lessons about the success factors essential for a productive partnership—lessons that any organization could benefit from:

- Employee-centered organization and project. Employees' concerns and preferences influenced the new service model's design—everything from the service catalog to IT system design. As a result, one year after go-live, the new Employee Care Service became the single point of contact for all departments providing a service to employee.

- Clear expectations. Gas Natural Fenosa and Accenture worked together to clearly define the Employee Care Service Model so that all stakeholders understood its key elements (objectives, service catalog, structure, technology model).
- The right team and project management methodology. The two companies assembled a multidisciplinary, hard-working team of people who were aligned with and committed to clearly defined deadlines and objectives.
- The right technology. The companies selected a best-in-class technology solution (BMC Remedy) and created a simplified yet ad-hoc configuration tailored to the client's unique needs.
- Strong change management. Strong client sponsorship of the Employee Care Service program and a highly effective launch campaign enabled Gas Natural Fenosa to communicate about the program with its entire workforce, launch the new model successfully and motivate increasing adoption of the new services.

We firmly believe that few Employee Care Services can match Gas Natural Fenosa's in terms of modernization, structure, service catalog scope, request-resolution rigor, technology system adaptation, and monitoring of service quality and service level performance. The model developed for the company can be customized to clients in other industries, through modification of service catalog content and request-resolution guidelines. The model thus constitutes a valuable addition to the HRO industry.

Moreover, the relationship has shown that client organizations can build on one successful HRO program to generate ever greater value from broader transformation initiatives critical to the organization's strategic objectives.

For instance, the success of Gas Natural Fenosa's Employee Care Service Center has directly supported the following initiatives:

- New Corporate University strategy for internal training: Training itineraries are now online, more collaborative and more oriented toward specific technical profiles—globally deployed but built with local contributions. This new model and learning management system (LMS) have been implemented in record time by Accenture eLearning specialists. The Employee Care Service has facilitated the communication internationally, leveraging the capabilities of the contact center already in place.
- Launch of HR campaigns: Campaigns regarding employee performance and social benefits (such as learning aids, holiday resorts and variable compensation) generate a lot of traffic, which the updated contact center has handled seamlessly.
- Improvement efforts. The new service enables early identification of high-impact errors and facilitation of quick responses to employees. Examples include detection of an error in the implementation of new payroll criteria after a major change in labor conditions. The Employee Care Service provided detailed explanations and solutions to all affected employees.

**One or more testimonials from the purchaser of services and/or a third party (e.g., external to either nominated organization) providing evidentiary confirmation of the nomination**

"We are a company with a genuine interest in the development and welfare of our employees. From the HR department we make a strong commitment to develop training programs and talent, maintain a wide range of social benefits for our employees (current employees and retired) and provide them with the highest quality attention.

In this line, as the culmination of our transformation process, we created a model of Employee Care Service that allows us to respond to the high number of inquiries and requests from our employees and retirees, based on our efficient and advanced operating pillars and with strict objectives of service commitment with them.

[This was] not an easy challenge due to the multiplicity of businesses, workplaces and professional profiles to which we respond, given also that the expectations of our employees on our service are the highest . . . ."

--Miguel Ángel Aller, Human Resources Director, Gas Natural Fenosa

**Be sure to provide details around the nominee's impact and the resulting outcomes, using specific numbers and metrics (where possible)**

Strategic value

The Employee Care Service Center developed for Gas Natural Fenosa has strengthened the bond between the company's employees and the Human Resources organization by facilitating an agile and simple relationship that enables employees to easily contact HR and that keeps employees continuously informed of the status of their requests.

But by far, the center's most valuable contribution is that it helps the HR function create more value for the organization while also increasing value delivered to employees. The systematized resolution model frees up HR to

spend more time on high-value-added tasks, such as implementing new training programs, ensuring that contractors have adequate security and technical skills and strengthen the knowledge management process. Indeed, HR specialist time dedicated to employee care has decreased by 80%, generating valuable cost and time savings for the company and freeing up HR specialists to devote time to more strategic concerns. Many specialists have even moved to job positions in other HR areas in the organization that needed their skills.

Meanwhile, service-level measurement and request traceability provided by Remedy, the case-resolution solution, has positioned the center to identify areas of improvement for HR processes and models. It also provides valuable, objective information on the HR model's impact globally on quality and service to the organization, and individually to the employee.

#### Measurable business results

The new center has generated impressive, measurable business outcomes for Gas Natural Fenosa. Overall, the program has boosted the level of service provided to employees, standardized HR processes, provided control and follow-up of HR activity through performance metrics, and sharpened HR internal teams' focus on more value-driven activities.

Examples of measurable business outcomes include the following:

- Cost savings. The number of internal FTEs dedicated to employee care dropped by 58%.
- Process improvement. Before, the average number of business days required to resolve employee requests successfully was 8. Afterward, the number dropped to 4—a 50% improvement.
- Quality/service improvement. Compliance level for responding to employee requests improved 27%.
- Employee satisfaction. Employee satisfaction increased 26%.
- Use of the new model. The Employee Care Service provides easy access for all employees to any HR-related information they need. As a result, 87% of active employees have used the center.
- Knowledge management improvement. The number of FAQs and answers defined rose from 50 to 600.

Such gains all contributed to improvements in employee engagement as well as workforce productivity. For example, these achievements enabled people to get quick, useful and correct responses to their requests and thus return to their job responsibilities sooner.

#### Looking to the future

As a result, Accenture and Gas Natural Fenosa plan to extend the Employee Care Service Model across geographic locations. As Alberto Moro, Gas Natural Fenosa HR Shared Service director (Corporate), explains: "We want to provide these services in the main countries where we operate, starting with Latin America—Mexico, Colombia, Brasil and Argentina—where most of our workforce is concentrated. Our idea is to put in place a global management approach, with the same team we already have, but adapted to local needs. We have shown that we are the channel that our employees recognize and value."

In addition, the model will be extended to other functions within Gas Natural Fenosa. Moro notes: "We are also already working to be the main interlocutor in other areas such as Health, Safety, Public Relations, Procurement and IT systems. We want the Employee Care Service to become the single point where employees get the service they need. At the end of the road, we will be providing service on a global level to about 13,000 professionals and more than 9,000 retired workers and families with whom we have a relationship; that is a target audience of 20,000 people."

## Programme of the Year

### **Mahindra AFS and PeopleStrong HR Services Pvt Ltd. – APAC**



#### **A summary of why this customer relationship should be considered for the award**

One of its kind and Wholesome deal – End to end employee life cycle (Hire to Retire) of Mahindra AFS, an Indian conglomerate with varied Business Structures consisting acquired entities, research & development, sales & marketing etc being serviced.

- Servicing 10000 permanent and 3000 other than permanent employees at across 150 locations in India for 11 Business Units under Mahindra Auto Farm Sector – one of the large conglomerates with presence in India, US, Africa, Middle east and multiple other countries.
- Relationship led to huge strategic value to Mahindra since it reduced cost of hire, released bandwidth of HR to do more strategic work and add value to management by offering better insightful analytics.
- One of the largest deals in the space of total value crossing 10m USD
- Scoping include performance management and training process also which adds more strategic dimension to overall engagement.

#### **At least three significant problems or issues that the buyer and provider together overcame in the course of delivering service and the methods or practices used**

##### Problem Statement

- Lack of Consistency
  - Different Business Units by virtue of legacy and way of working had different processes running.
  - Role definitions not consistent across business units: Similar activity was performed by different roles across business units
  - Lot of redundant/non value added activities performed across HR processes in scope
- Improvement in to overall Efficiency and Effectiveness
  - Discrete operations resulting in low efficiencies and high HR : Employee ratio
  - Low automation of activities/integration of systems across processes resulting in lot of manual efforts/work hence chances of slips/error during execution.
  - No defined SLA's and reverse SLA's to ensure timelines adherence for completion of activities
- Lack of Reports/Analytics for informed decision making
  - Manual data collation/tracking for preparing even the basic reports
  - Lack of pro-active reporting to take informed business decisions basis the data and facts
  - Multiple systems and manual excels leaving question on data authenticity

##### Project Scope

- Employee Helpdesk for HR Processes and Policies related Queries
- Recruitment Process Outsourcing
  - Sourcing Management through various channels
  - Shortlisting - Screening and Validation
  - Interview Process Management
  - Line Managers Management
  - Query Resolution
  - Hand Holding of Selects/Pre-Joining activities
  - Quality Management
  - Governance
  - MIS & Reports
- Human Resource Shared Services Centre
  - On-boarding – Pre Joining, Joining & Post Joining
  - T & D Administration

- o PMS Administration
- o Separations Management
- o Confirmation Coordination
- o Transfer & Relocation Coordination
- o HRMS Database Updation & MIS

#### Overall Solution Framework

Overall solution framework is divided into three major groups with following structure:

- a. Project Governance Group (Representation from Client organization)
  - a. Knowledge base Management
  - b. Change management 'HUB' for process and policies.
  - c. Project Control Center
    - i. Analytics
    - ii. Recommendations for improvement
    - iii. Quality Compliance
- b. Transaction Support Group
  - a. Database Management
  - b. Technology exchange module
  - c. Statistical analysis for improved business predictability and better decision making
  - d. Implementation and maintenance of Alt- Recruit and Alt Organize for Automation
  - e. Process Tracking & Control
- c. End Customer Support Group
  - a. Anytime / anywhere multiple interface access
    - i. Email / web/Call
  - b. Dedicated service interface
    - i. Helpdesk/ Recruitment /HR operations
  - c. End Customer satisfaction programs
  - d. Onsite/Offsite delivery Model

#### Solution Approach/Approach

Solution approach to the problem statement was divided into five main groups. The Transitions & Solutioning team had a 180 day project plan to understand, assimilate, fix, train & implement the solution frame work. Involvement of Operations in Transitioning ensured seamless migration and implementation of in-scope activities.

The entire transitions/solutions approach had following structure:

1. As is Understanding (Using SIPOC methodology)
  - Understanding M & M AFS Org Structure
  - Understanding the current process & policy framework
  - Understanding the current connecting points for ERP
  - Understanding the business stakeholder requirements
2. Assimilating Best Practices
  - Gap Analysis (Using PCMM scale) and recommendation considering:
  - Optimum resource utilization
  - Effective Project Management
  - Identifying best practices within & beyond the organization (Both HR as well as industry)
  - Proposed Techno-Functional Requirements for Automation/System integration
3. To Be Design Framework
  - Designing new HR Structure
  - Designing the new workflow with roles /users ( Process + Technology ) with SIPOC Methodology and applying lean principles
  - Flow of data between the applications / processes
  - Designing User Specification document and FAQ's
  - Sign off on the workflows , roles, users, access rights, reports from Project Management Group
  - Configuration and customization of Alt recruit and organize as per the signed off workflows
4. Pre-Implementation
  - Pre-Implementation Checklists ( People, Process, Technology )
  - Communication and Change Management
    - i. Designing of teasers/e-mailers/user guides
    - ii. Arranging Road Shows/town halls to education employees on New way of working
  - Traain the trainer programs
  - Identifying change agents among BUHR's to ensure communication reached to last man standing
  - Resource hiring/Re-badging

- Training of project teams on new “WOW (Way of Working)”
  - UAT release and sign-off for the Alt Organize and Recruit features and functionalities
  - Risk identification and mitigation strategies
5. Implementation & Roll out
- Phase-wise approach to ensure seamless implementation and adoption
  - Hypercare for 2 months where transitions and operations team work together to ensure smooth execution and tweaking any processes as per ground level challenges (if any)
  - Signing of Governance Charter for regular performance review and identification of improvement areas
  - Project Management & Monitoring

### **The approaches and/or programs initiated through the relationship and how results were measured**

#### Key Solution Approaches/Programs:

1. Recruitment Process Outsourcing (RPO) :
  - a. RPO (recruitment process outsourcing)
    - i. Team Structure:
      1. Onsite Team –
        - a. Engagement SPoC – For interfacing with Line Managers/Other stakeholders
        - b. Source Management SPoC at 2 Locations to ensure driving of Employee referrals
        - c. Offsite Team – Gurgaon
        - d. Sourcing Group
          - i. Responsible for sourcing through
            1. Job Portal
            2. Social Media like Linked In, Facebook, other online resources
            3. Referencing and networks
            4. Head Hunting/Competition Benchmarking
        - e. Processing Group
          - i. Responsible for managing the entire life cycle of recruitment
            1. Interview Process Management
            2. Document Collection
            3. Medical Examination
            4. Background verification
            5. Pre-Joining Activities
  - b. Alt Recruit ( Application Tracking System ) : Leveraged technology and automation for quick turn around and real time availability of information; the entire technology is divided in to 4 interfaces:
    - i. Employee Portal:
      1. Giving Employee Referrals against open positions and tracking status of referrals
      2. IJP applications against open positions and tracking status of application
    - ii. Recruiter Portal
      1. Managing End to end Recruitment Cycle
    - iii. Business Portal
      1. Tracking status of Positions/resumes
      2. Giving Feedback
    - iv. Candidate Portal
      1. Integration with career portal
      2. Submission and tracking of application
  - c. Efficient Sourcing Management with Standardization of Source Mix for all locations with 50% contribution of Paid Channels and 50% Non-Paid Channels
  - d. Standardization of Offer and CTC Templates across Business Units (To the extent possible); Release of Offer letters centrally by RPO Team
  - e. BGV : Common Vendor Across AFS, Standardization on BGV Checks and Level for conducting background verification, Preparation of Action Matrix (for BGV report)
  - f. Standardization of Travel Re-imbursements limits across Business Units
  - g. CTQ's (Critical to Quality ) parameters defined for all open positions for effective pre-screening and improved conversion ratios
  - h. Centralized resume database and JD repository on recruiter portal
  - i. Candidate feedback survey from all candidates appearing for interview; Reporting/analysis of the same for deriving process improvements

- j. Dedicated line for resolution of candidate queries
  - k. Standard MIS and Reports for all Business Units. Example : Manning Report, Conversion Ratios, Source Mix, Recruitment Trend, SLAs, CPH (Cost per hire)
  - l. Standard communication templates and forms
  - m. Source Tracking and managing vendor/employee payouts
2. HR Shared Services (HR Transactions):
- a. HR Centre branded as “MPeople” Structure :
    - i. Onsite Team – Location HR SPoC(s) at 11 Locations
    - ii. Offsite Team – Gurgaon - SAP Group, On boarding Group, Transaction Processing Group, Document Management Group
  - b. Hub and Spoke Model: Centralized joining at Hub locations with onsite SPoC responsible for joining coordination and offsite group supporting joining activity from pre-joining stage, Token ID creation & Document processing
  - c. Standard document checklist & E-docket and Central Bank Account opening across Business Units
  - d. Onsite SPoCs facilitate the 3 day induction procedures and IT procurement
  - e. P-File and E-file – Collection of documents done by Onsite SPoCs and creation of P-Files and converting them to e-files by Offsite group
  - f. Standard confirmation, transfer and separation processes administered through SAP across Business Units
  - g. Centralized database management of all employees including permanent, contractual, temps on PeopleStrong HCM Platform
  - h. SAP Updations across Business Units for employee data changes
  - i. Standard MIS and Reports for all Business Units published as per decided frequency e.g. SLA reports, Red flag reports etc.
  - j. Standard communication templates and forms
3. Employee Helpdesk – Query Resolution Management
- a. End to End query management related to HR processes and policies for all employees
  - b. Defined query categorization and levels
  - c. Escalation matrix for handling different levels of queries
  - d. Employee connect maintained through auto responders & query resolution within SLA
  - e. Input and maintenance of employee master data
  - f. Three modes of query resolution i.e. through phone, web and e-mail
  - g. Single POC for all employees concerning any query
  - h. Various MIS and reports covering top query categories, trends etc.

#### **How the relationship has contributed to advancing the practice of HR transformation and/or HRO**

- Integration: Mahindra is now able to Integrate existing processes and activities under one service umbrella (simplifying and standardizing across all units , looking at processes from an end to end stand point)
- Standardization: Standardization of processes has freed up time for HR-Generalists and COEs as they are relieved of administrative work to ensure they can focus on the strategic activities to have positive impact on the business (i.e.) the drift has taken from staff room to the board room
- Be Informed: Statistical approach of managing business operations due to availability of any time in time reporting/dashboards/analytics etc. – Helps to avoid irrational decisions and subsequent cost implications
- Predictability: Consistency and predictability of business delivery - by achieving Service Delivery excellence through a one-stop-shop with employee self-service, transaction processing and on-line MIS availability
- Cost Efficiency: Enhanced cost effectiveness through the creation of offshore Shared services center at Gurgaon, re-sizing of HR-operational model (re-designing the To-be processes), rationalization of HR Business process, reduction in complexity, focus on lean processes saving cost and time
- Process Improvements: Focus on design and implementation activities (i.e.)- Process, Technology, and People — led to smooth Change management thereby making it a success. Continuous efforts in improving the laid processes basis the feedbacks/opportunities and ground level realities for increased satisfaction. (In line with PeopleStrong Motto – “We create Happy Organizations!!!”

**One or more testimonials from the purchaser of services and/or a third party (e.g., external to either nominated organization) providing evidentiary confirmation of the nomination**

“ The entire journey of moving towards Shared Services for HR for us along with PeopleStrong is of great strategic importance for Mahindra. The automobile industry runs on a cyclical process and its very important that HR keeps pace with the ups and downs of business. With this relationship our HR team has got their bandwidth released to more engagement and business partner related activities. Needless to say that we have already started cost benefit through optimization and further automation for the various processes. The engagement started with the deep diving into our existing process and revamping them into more efficient processes, followed by change management and training and role change for our existing team. Change management process itself was very critical in the roll-out since the scoping included high touch point processes like Recruitment, Performance management system administration and also training administration. We conducted road shows, workshops, called up external experts with sponsorship from the CEO as well for smooth penetration. PeopleStrong has been able to demonstrate HR thought leadership in revamping the processes. Their transitions team’s ability to understand our culture in a very short time and implementing relevant process has really been a delight for HR, employees and the executive team at Mahindra. We are looking forward to showcasing this at the summit.”

Rajeshwar Tripathi – Chief People Officer, Mahindra AFS

“As a program manager and also managing the HR for a large part for Mahindra, I have seen significant bandwidth of my team getting released. The analytics from the team helps me in decision making. My interaction with the leadership team has become much more meaningful with the transactions going out of my team and moving to Mpeople (HR Shared Services along with PeopleStrong). The relationship is moving in the right direction and we will continue to leverage the engagement for the benefit of my function. “

Riya Dalvi – Head corporate HR, Mahindra AFS

“I feel designing and implementation is the strength of PeopleStrong. Their leadership is very client focused, and the governance works very well. As the program manager, this is the first time when we have moved to a centralized HR delivery model in a complex working environment. We have been able to standardize lot of process and at the same time are able to maintain business focus on respective units as well. The voice based HR helpdesk works as the frontend to employees along with the technology Self Services modules. The backend runs in a hybrid model with on-site and offsite teams. The relationship also is evolving since PeopleStrong has dedicated focus to business critical processes like performance management system, training and recruitment processes. The automation for recruitment process has brought in transparency in the system and we could integrated all the sourcing channels for CV inflow.

Somesh Dravid – Head HR Shared Services

**Be sure to provide details around the nominee's impact and the resulting outcomes, using specific numbers and metrics (where possible)**

- a. Consistency
  - i. Central Administration of HR Operations | Training | PMS | HR Helpdesk | Recruitment
  - ii. Process Standardization and elimination of Non Value Adding and Redundant Steps : 11 Processes and 76 Sub processes
  - iii. SLAs Defined : 77
  - iv. HR Stakeholder & Role Definition
- b. Efficiency
  - i. Centralized administration with decentralized process ownership @ strategic locations
  - ii. Leveraging ERP : Alt Recruit(ATS) - Employee Referral Portal, Recruiter Portal, Business Portal, Candidate Portal, SAP Integration for all HR Processes
  - iii. Maker Checker concept implemented in in-scope HR Processes
  - iv. HR: Employee Ratio improved from 1:54 to 1:68
- c. Effectiveness & Performance
  - i. Process Health Meter – SLA and Reverse SLA scorecard with weekly, monthly operating review with HR
  - ii. Adoption @ Mahindra Auto Farm Sector across the group @ 63% (Complete Go-live in Oct'13)
  - iii. YTD Request Closure @ 99.3%
  - iv. 98% of Level 1 requests around Policies & Benefits resolved within SLA
  - v. 94% reduction in open requests from go-live till Jan'14 (includes data management and MIS)

- vi. 91% of SAP requests completed within SLA
  - vii. 95% of Experience and Relieving Letters handed over to employees on Last Working Day (excluding cases where NDC initiated is less than 7 days )
  - viii. 96% PMS requests resolved within 18 working hours from the request of the query
  - ix. 91% Mid-Year Review (PMS) completed within time.
  - x. Behavioral Training calendar adherence @ 94.4%, Functional training adherence @ 79%
  - xi. 51% recruitment delivery through channels like employee referrals and internal job postings
  - xii. Conversion at first interview stage improved to 50% from 30%
- d. Integrated Strategic Service Delivery – One India Employee Experience
- i. Servicing 10000 permanent and 3000 other than permanent employees at across 150 locations in India for 11 Business Units under Mahindra Auto Farm Sector
  - ii. Setting of One Stop Query Resolution System – Helpdesk reaching to a 97% First Call Resolution (FCR) rate
  - iii. Decreased Touch time - Average speed of answering – 03:49 minutes
  - iv. Auto replies and triggers to maintain employee connect
  - v. Over 19000 unique requests, handled for employees in a span of 6 months from Jul'13 @ average 250 requests per day
  - vi. Approx. 1200 new hires delivered through single window interface
- e. Compliance
- i. Governance Charter – Sponsor, Strategic, Tactical, Operational
  - ii. Industry best practices implementation – Policy Benchmarking & Gap Analysis every Quarter
- f. Insights
- i. Business Intelligence – Quarterly projects on Key Business Metrics
  - ii. Decision Support System
  - iii. Real time analytics On Alt Infer
- g. Cost Leadership
- i. HR Strategic Bandwidth Release : 11088 Man hours per month
  - ii. Consolidation, Standardization , Redundancy and NVA activity removal

## **Programme of the Year**

### **Procter & Gamble, Cartus, and IBM – APAC**



#### **A summary of why this customer relationship should be considered for the award**

The relationship among P&G's HR Services & Solutions Team (HRSS), and IBM and Cartus is exemplary. The P&G/IBM contract is 10 years old, and was recently renewed for another 7 years. The P&G/Cartus partnership is 6 years old and is likewise going strong. The partnership among three companies is the best in the globe for P&G. The team's results have been recognized within P&G, as well as in the industry (HROA and the Forum for Expatriate Management).

This deal is one of the more complex in the HR outsourcing industry in Asia, serving 24,000 employees in 16 countries for Payroll, Tax, Benefits, Employee and Organization Data, Balance Sheet Reconciliation, Travel Card, Expense Reimbursement, Contact Center and Project Management, and Relocation Services.

Both partnerships transcended operational provision of HR services, into a business enabler, through superior and consistent delivery of value-added services AND as strategic partnership to business units in P&G.

#### **At least three significant problems or issues that the buyer and provider together overcame in the course of delivering service and the methods or practices used**

1. **BUILDING THE BUSINESS THROUGH COST SAVINGS IN RELOCATION SERVICES** - This past year, a number of business units in P&G came under severe financial pressure, and the team was challenged to come up with cost savings in the Relocation & Expatriate Services area, one of the biggest cost areas, without diluting the overall employee experience. Cartus worked with the P&G team and with HR clients to understand the business needs, and also reviewed policies which could be modified, based on patterns of employee availment and feedback on the service, as well as comparing these practices with the industry. Cartus took a vertical approach by examining the cost savings opportunities by market, as well as a horizontal approach in reviewing the spend pool by services and products. This approach enabled the team to put together the right solutions for P&G businesses in a way that stays relevant to the current environment that P&G is operating in. This has resulted in cost savings of up to USD5 million for the business, without adversely affecting the employee's relocation experience and without causing any business disruption.
2. **VIETNAM CHALLENGE** - The team encountered delivery challenges for its Vietnam payroll operations due to multiple issues in various areas, because of antiquated technology and processes. This resulted in some payroll, benefits and tax misses which led to some dissatisfaction among employees and HR clients. P&G and IBM jointly established a Crisis Management process to develop a Recovery Plan that led to a successful and sustained 2013 Vietnam performance. The Recovery Plan covered the following aspects:
  - a. **SAP Payroll Implementation** – Vietnam was the last P&G market in Asia that was still running on a legacy system which was 20+ years old, i.e. Access old version program, which was no longer supported by Microsoft. At that time, SAP still didn't have the country solution, but this did not stop the team to look for a more sustainable payroll solution. The team leveraged the EPIUSE solution which was applied for the other P&G payroll solutions in the Americas. When due diligence was done, a business case was proposed to the P&G Vietnam HR Leadership who eventually funded the SAP Payroll implementation. This implementation did not just cover the technical implementation but also provided the venue for HR to review existing policies and create new policies. As a result, there was no need to reconfigure SAP.
  - b. **In Country Transformation** – there are a number of HR outsourced services being provided on the ground by IBM, but these were not optimally administered. Through HR leadership engagement, the team transformed in country support and moved more than 20 critical processes from Vietnam

to the Manila Delivery Center, which resulted into a sustained in country performance and processes that are aligned with the standards.

As a result, last July 2013, we have successfully exited the Vietnam Critsit and met the very high criteria we have set for ourselves:

- 100% Green SLA on Pay Timeliness and Accuracy, almost zero error month on month
- P&G Payroll Internal Audit which scored 8, the highest with zero issues noted
- 100% Tax & Regulatory Compliance
- Successful Vietnam Yearend Tax Processing

The learnings were documented and transformed into a standard Critsit Methodology which has been re-applied to the other regions and accounts who encountered similar challenges.

3. **FLAWLESS PLANNING & EXECUTION OF YEAR END TAX FILING** – In the past, the team had been encountering issues in filing the year end tax reports for various countries, due to unclear accountability, lack of agility in reacting to local tax law changes, and poor planning. Some countries' year end filings were fine, and some others were late or had errors. Thus, the IBM Team embarked on a strict and comprehensive project management approach to Year End Tax Filing by mapping out the tax filing process, parties involved and accountability for every country. This was led by a designated Project Manager, who was supported by the Operations Teams and the inhouse Tax Manager. The team had a clear critical path schedule and for each country, which was reviewed with the P&G HRSS team on a regular basis. With this approach, the team was able to anticipate important milestones and also act in an agile way to changes in tax laws. As a result, the team was able to deliver flawless Year End Filing for the various markets so far.

### **The approaches and/or programs initiated through the relationship and how results were measured**

1. **Clear and established Joint Business Planning** between P&G HRSS and its suppliers, Cartus and IBM – Every year, P&G HRSS develops its action plan, comprising of specific goals, strategies and projects. This is cascaded down to Cartus and IBM, clearly spelling out for each supplier which are the “big rocks” and what specific help is needed by the suppliers to deliver on this work, including resourcing, capacity, portfolio planning, capability building. Every month or quarter, depending on the service, these plans are reviewed so that P&G and its suppliers can track status and any help needed in order to ensure that we can meet the goals. At the end of the year, we review plans with both suppliers, identifying accomplishments and recognizing and rewarding them. We also review challenges and off track items, so that we can distill any learnings for the next fiscal year.
2. **Vision Driven Partnership** – This past year, to renew the 10 year old P&G and IBM partnership, the team embarked on jointly defining a vision to further drive results and to re-establish P&G as the preferred account in the IBM Manila Delivery Center. P&G's vision is “E-focus: Enabling Employees through User Focused Services.” The IBM team used a bottom up approach and engaged their top talents in developing a vision for the account that supports the vision of their P&G client: “We are Essential. We are P&G's preferred HR and F&A service provider. We create excellent client experience in every interaction that makes things simple, easy and stress free for P&G employees.” This vision was further cascaded to each service line, which defined what it meant to their operations and daily behaviors. The IBM team also developed support systems like P&G Academy (Training and reapplication of best practices); P&G Einstein (programs to encourage and reward innovation); and P&G Disney (Work life balance and activities that foster one community) to further cement the vision. This vision driven approach has injected new energy and motivation across the team and has resulted in reducing attrition and also produced many ideas to improve operations, resulting in stronger results and employee satisfaction.

### **How the relationship has contributed to advancing the practice of HR transformation and/or HRO**

Proven results over many years demonstrate that P&G and Cartus are a key in not only flawlessly delivery relocation services, but also enabling growth and reducing cost for the company. The team has transcended the basic delivery of mundane relocation activities, which comprises the traditional relocation service. The partnership has long TRANSFORMED into wholistic, professional project management of complex group moves, creative design of relocation activities (individual and group looksees, informational roadshows, more efficient househunting trips and orientations on the housing market in Singapore, etc.) and business building by introducing innovative cost savings, while at the same time not diminishing the employee experience.

As for the more established P&G and IBM partnership, the team is demonstrating that the relationship can further grow and exceed already strong results, through a vision driven and disciplined approach, thereby generating a higher level of employee satisfaction and value to the business for the IBM employees in the account. This renewal of the partnership is ahead of the game across the P&G world, as well as among IBM's clients in the region.

The quality of the partnership among P&G, Cartus and IBM and the way the team has partnered with its HR clients has shown that what is typically a very operational, mundane, back end running of outsourced HR process has been transformed into a true enabler of the business. The team adds real value and directly helps employees to be more productive to focus on their work, and not on HR issues/matters.

The partnership with P&G in both IBM and Cartus companies are a standard to be emulated by other clients of these companies.

**One or more testimonials from the purchaser of services and/or a third party (e.g., external to either nominated organization) providing evidentiary confirmation of the nomination**

“This is tremendous recognition of the outstanding leadership that Jim Pazzaglia (of P&G global) has provided globally, and that Rocky Esguerra ( P&G Asia HRSS) has provided in Asia, to really drive a truly winning partnership. As you are aware, behind this terrific leadership with Cartus, and their strong delivery, Asia has gone from worst in class to best in class for relocation user satisfaction. Jim and Rocky are codifying what it takes to do this, as indeed, this is a terrific role model for winning supplier partnerships which deliver significant business results. Jim, Rocky – many thanks for both your individual leadership and your joint leadership in driving these results.” – Janis Ross, Global VP, HRSS

“ I want to take the opportunity to thank you and the team for an excellent job day in and day out – and helping us manage the business as HR Business Account Managers. It is a lot of hard work behind the scenes and very encouraging indeed to see it getting recognition.” – Surya Rai, Associate Director, Asia Research & Development HR

“Just want to take recognize the team who has helped us in big organization transitions like Hinode, Baby Care & R&D in the past 2 years.” – Mahboob Alam, Associate Director, Singapore Site HR

“You have led the Asia HRSS to a very different level. It is industrial benchmark now. Congratulations ☐” – Tricky Chen, Thailand Country HR Manager

“I would like to express my deep appreciation to the Cartus Team for your great support and quality of service for our transferees. This year, we have had two major projects that moved about 100 people to Singapore at the same time. Despite this big challenge, the Cartus team has delivered high quality responsive service to our transferees which enable people to settle down quickly into Singapore and have a vertical start-up at work. On a personal level, I also found that my Singapore move was the best experience among my many relocations in the past. Thanks again to the entire Cartus Team for all the excellent support and service.” - Martin Riant, Global Baby Care Group President

“We have been able to run this \$11 billion global business from Singapore successfully because of HRSS and its suppliers. You have made it all easy and possible to start.” - Annie Huang, HR Director, Global Baby Care

“Looking at HRSS, let me express my appreciation for the work HRSS is doing and stress its relevance. HRSS touches the lives of all P&G employees almost every day. The delivery of the HRSS critical SLAs in areas such as Payroll, Travel, Relocation, etc. is absolutely crucial for our business as well as for the recognized performance of overall GBS. HRSS is also driving critical innovative initiatives such as Flexible Benefits (MyPay MyWay) or Expenses On-Line that resonate very well with clients and users.” - Matthias Trinn, GBS Director, Greater China

**Be sure to provide details around the nominee's impact and the resulting outcomes, using specific numbers and metrics (where possible)**

95% of P&G employees rank their relocation experience as favorable (at least 5 out of an 8 scale) and 76% rank their experience top block (at least 7 out of 8). Nowhere in the P&G world nor among Cartus' clients in the industry has a partnership achieved such extremely high and sustained results.

IBMs SLAs in the various service lines they handle has been green (more than the 99% target) these past 4 years, proving that the Asia HRSS and IBM Team is the best in the P&G world, as well as in the industry. This is especially commendable, considering that this is not your typical simple outsourcing of a limited number of HR services, but a complex range of services for over 24,000 employees in the Asia region which includes Payroll Administration, Stock Option Payment, Tax & Regulatory Compliance, Expat Compensation Payment Processing, Benefits Administration, Compensation Administration, Employee Data Management, Organization Data Management, Balance Sheet Reconciliation, Travel Card Management, Expense Reimbursement Processing, Contact Center and Project/Change

Management. There is no company in the industry that has outsourced this extent of HR services and that has achieved such consistently green SLAs in their performance.

Separately, the P&G HRSS team is one of the top performing teams in the company. Aside from its impressive business results, the team also has a strong, organizational culture, having gotten a score of 90 out of 100 in the internal employee satisfaction survey. This score is much higher versus function, business unit and regional averages in P&G.

## Programme of the Year

### Thomson Reuters, Aon Hewitt, and Workday – North America



#### **A summary of why this customer relationship should be considered for the award**

In early 2011, Thomson Reuters embarked on a global initiative to transform all aspects of their human resource model with the ultimate objective to move from a model of 'managers trying to work in a global environment' to 'global managers working in a global environment.' They also wanted to move from a highly customized technology to a new SaaS platform, Workday.

The Thomson Reuters leadership team engaged Aon Hewitt to partner with them and Workday to define and build a new global service delivery model incorporating the role of 'service provider' to support their 25,000 employees across the US. This model would be the first major payroll implementation using time tracking for Workday and the first Aon Hewitt BPO client on the Workday platform. Over the next two years, the team from around the globe built and delivered this model while continuing to support the business and modify the scope of the project to reflect ever-changing business needs across the Thomson Reuters organization.

#### **At least three significant problems or issues that the buyer and provider together overcame in the course of delivering service and the methods or practices used**

1. Roles/Responsibilities and Governance: Given the global nature of the program combined with the large number of parties, clear definition of the roles and responsibilities each party played in the model as well as the governance structure was integral to not only to the delivery, but to the sustained operation. The Workday platform utilizes highly configurable business processes. However, these processes need to be carefully defined with the 'roles' in order for the end-to-end process to function accurately. Naturally, it was a challenge to harmonize the global processes and roles to support this. In addition, the role of the 'service provider' was new to the Workday model and had to be developed in concert with the implementation, particularly as it related to service center support to employees. As Aon Hewitt provides support to Thomson Reuters U.S. population only, this role also needed to be assessed in relation to the organization globally.

In addition, IT scope changed dramatically. The primary responsibility moved from Aon Hewitt to Workday for their application and integrations, and shifted to Thomson Reuters for all other integrations and third party provider relationships.

Because of ongoing maintenance releases, it was crucial that the appropriate governance was in place to ensure there were no service disruptions.

2. Payroll Functionality: The business requirements of the project challenged Workday to deliver more robust functionality, specifically around retro pay processing, time tracking, FMLA and deductions and earnings. As a result, the Aon Hewitt and Thomson Reuters project team needed to be flexible as they moved through the testing process to evaluate how the detailed functionality worked and what process changes might be required.
3. End-to-End Testing and Cutover/HyperCare: The move from PeopleSoft to Workday in conjunction with the harmonization of global business processes naturally resulted in major work initiatives around data mapping, data conversions and integrations. These large projects, in combination with the change in roles and responsibilities between Thomson Reuters, Workday and Aon Hewitt added yet another level of complexity. All aspects of testing including intensive parallel testing, to the person level, were a key to the success of the overall program.

Before the launch, the joint teams developed and agreed upon a robust approach to manage the operational readiness and cutover activities using tools such as Quickbase. Additionally, during the 'freeze' period and the month after go-live, a HyperCare model was introduced and provided regional, domain and partner forums to identify and resolve any issues that occurred. This was extremely effective in providing the appropriate level of visibility and support to all three partner organizations.

### **The approaches and/or programs initiated through the relationship and how results were measured**

Through this HR transformation, Thomson Reuters' main priority was to streamline its HR processes to one, consistent global model to provide the best support to its employees. As part of this transformation, Aon Hewitt worked with Thomson Reuters to transition from PeopleSoft to Workday, while in parallel built their Workday practice to support the new outsourced model, providing a blue print for a new growth business. Success of the partnership was measured by four main goals:

Thomson Reuters reduced investment in IT; Utilizing technology to standardize their business process globally; Increased reliance on self-service; and Improvement of the user experience.

On an ongoing basis, Workday is partnering with Aon Hewitt and Thomson Reuters to continue to improve product and service delivery.

### **How the relationship has contributed to advancing the practice of HR transformation and/or HRO**

The Thomson Reuters/Aon Hewitt/Workday relationship challenged each of the organizations in new and exciting ways and made a lasting impact on the outsourcing industry. For Workday, Thomson Reuters was the largest client (at the time) to utilize the functionality of its application for payroll and timekeeping. Its successful launch validated that the SaaS model can work effectively across the BPO space by globally establishing common processes across the business. Because of the scale of the Thomson Reuters implementation, Workday has used them as a proving ground to develop new capabilities and enhancements for large-scale implementations.

As the first client on the Workday platform for payroll and timekeeping for Aon Hewitt, the lessons learned and implementation process have served as a framework for all subsequent Aon Hewitt outsourcing clients. Aon Hewitt has incorporated learnings from the Thomson Reuters experience to develop an operational point of view for Workday implementations and a "standard tenant" to guide future client relationships, all built on the Thomson Reuters relationship.

### **One or more testimonials from the purchaser of services and/or a third party (e.g., external to either nominated organization) providing evidentiary confirmation of the nomination**

Susan Laskey-Myers, SVP Global HR Solutions at Thomson Reuters

Thomson Reuters introduced Workday to over 60k employees and managers in 100 countries on the same day. The implementation was very complex, had multiple components and essentially replaced the majority of our HR Systems infrastructure, Global HR Processes, and over 150 integrations to third party vendors and internal systems. It also replaced our Payroll systems in the US and Canada, Time Entry systems in US, Canada and UK, required payroll integrations to some of our global vendors and a new strategy for how we provide information to our remaining payroll providers in numerous countries. We had the added complexity of our BPO relationship with Aon Hewitt, then responsible for our technology, HR, Payroll and Benefits Administration in the U.S.. Moving to the Workday SaaS model brought significant change to the outsourcing agreement that required revision to our original agreement and the transition of knowledge at Aon Hewitt to continue as our BPO Partner. The transition to Workday "Changed the Game" at Thomson Reuters and allowed us to achieve our goal of building a solution that would bring value to the business and for defining a new, simple, global, standard user experience for our managers, employees and HR. The strong support and partnership of both Aon Hewitt and Workday and the drive to be successful were critically important to our launch. Beyond the project, we remain strong partners and are working closely to define what success means for large companies in the SaaS and BPO environment pulling from our collective experiences.

*"The result of this ambitious global HR transformation is enabling Thomson Reuters to standardize business processes globally, empower employees with self-service, and reduce investment in IT," said Jim Bozzini, senior vice president of services, Workday. "The success of this initiative could not be achieved without the deep and trusted partnership between Thomson Reuters, Aon Hewitt, and Workday. This can now serve as a model for other organizations planning to transform HR on a global level."*

**Be sure to provide details around the nominee's impact and the resulting outcomes, using specific numbers and metrics (where possible)**

Through our combined teamwork, Thomson Reuters has been able to streamline their global HR processes and expects to see continued improvements ahead. Specifically: Thomson Reuters was able to move from 12 manual data entry forms with various employee and job information to just four. Their old multiple time keeping system has been replaced by one common system across the U.S., Canada and the UK. The number of year-end custom reports for tax filing and W-2 processing went from 66 to four. The team was able to reduce the non-productive time, which allowed the team to work more efficiently and reduce weekly time calculations by an average of six hours. Most significantly the automation of many business processes has resulted in close to 90% utilization by managers and employees vs. low 60% in the prior environment.

## **Programme of the Year**

### **Thomsons Online Benefits and bwin.party – Global**



#### **A summary of why this customer relationship should be considered for the award**

bwin.party is the world's largest listed online gaming company. A recently merged and fast-growing business, bwin.party recognized the need to build a universal global reward infrastructure that would enable rapid staff integration; global mobility; and a universal reward program across seven countries with different languages, employment law, tax and culture. bwin.party selected Thomsons Online Benefits, a provider of cloud-based benefits management software, to create a global, harmonized, branded reward program. Featuring the same look, feel and structure internationally, the program was localized to each region. As a result, bwin.party's global mobility has improved with a 50 percent increase in relocations.

#### **At least three significant problems or issues that the buyer and provider together overcame in the course of delivering service and the methods or practices used**

bwin.party began looking for technology solutions to manage employee benefits following a merger with Party Gaming in 2011, which led to a workforce with employees on different benefits and salary packages. The company is a diverse and culturally rich, with more than 2,900 employees comprising more than 50 different nationalities across three continents. The workforce is 69% male; relatively young, with an average age of 32. It is very 'new' workforce following the merger, with an average length of service of just 3.5 years; and fairly well paid with an average salary of £28,435 across the 7 countries.

As a result, bwin.party faced the following benefits administration challenges:

- Delivering a universal reward scheme across seven countries with different languages, employee law, tax and culture
- Creating one platform to deliver pay, benefits, shares and recognition schemes
  - Previously some employees had received little or no benefits, and even where benefits were provided, they did not match the demographic profile of employees or offer any choice
  - A survey carried out prior to the merger identified issues with fair pay, benefits and transparency of reward
- Engaging the very young, extraordinarily IT-literate workforce

To address these challenges, bwin.party needed to create a reward program that would encourage organizational agility, integration and global mobility among employees. It also needed to provide a structure to make future acquisitions easy and increase employee engagement while reinforcing the new brand. bwin.party spent a year researching how best to harmonize benefits and salaries, taking into account the different legal and cultural requirements in each country. They also looked to implement flawless data management and underpinning technology to ensure that employees could easily see the value, and have much greater control, of their remuneration package. The goal was to provide a single, global approach to benefits administration while removing previous visible differences between companies, locations and employees.

#### **The approaches and/or programs initiated through the relationship and how results were measured**

bwin.party and Thomsons Online Benefits closely collaborated to create an exceptional benefits administration solution: "just.rewards," a global, harmonized, branded reward scheme with the same look, feel and structure internationally but localized for each region. The "just.rewards" portal was the first visible initiative launched following the merger, which impacted all main offices.

In each territory the company sought to offer employees certain core entitlements (e.g. Group Life Assurance) as well as offering local options based on meeting employees lifestyle objectives (e.g. health and wellbeing). At every stage, the global team sought input from the local HR business partners who were able to localize the global approach with

best of breed solutions, increasing benefits' effectiveness unique and relevant to employees' individual circumstances, life-stage and objectives.

The technology was flexible enough to link all of the global rewards strategy systems (flex and voluntary benefits selection, global share plan and recognition scheme) maximizing value to employees by offering choice, innovation and flexibility. Employees were also involved in this transformation with on-going employee feedback on future additional benefits and / or design options.

"just.rewards" officially launched in the UK and Gibraltar in April 2012, utilizing innovative, unique communications distinctive to location. Every employee was reached through a combination of on and offline material drip-fed in the weeks prior to launch.

The "just.rewards" communication program included a tailored email campaign featuring teasers, pre-launch countdown and post-launch reminders. It also included location-specific posters and branded screensavers on every PC, 'credit cards' displaying the URL for remote access as part of gatefold brochures and in-depth employee briefings and site demonstrations. A viral campaign sharing the hilariously exuberant views of an employee about the benefits he wanted to see sparked enormous interest among co-workers. Other communication tactics included two days of benefit provider roadshows encouraging employees to login and view the options available and a Thomsons international helpdesk.

Thomsons and bwin.party implemented "just.rewards" in seven countries in less than 12 months — UK, Gibraltar, India, Bulgaria, Austria, Sweden, and Israel. This implementation included the introduction of the very first flex scheme in Bulgaria. It demonstrated the commitment to a single approach to employees and went some way to reducing the "us and them" culture – this was even possible in those locations which are not yet as developed from a reward perspective e.g. Bulgaria and Israel.

Success of "just.rewards" would be measured by log in rates and cost savings.

#### **How the relationship has contributed to advancing the practice of HR transformation and/or HRO**

The ability to create one common platform to deliver pay, benefits and recognition programs within completely different environments – language, law, culture – is not only significant, but extraordinary. In each territory the company sought to offer employees certain core entitlements (e.g. Group Life Assurance) as well as offering local options based on meeting employees lifestyle objectives (e.g. health and wellbeing).

At every stage the global team sought feedback from local HR business partners who were able to 'localize' the global approach with best of breed solutions, hence increasing benefits' effectiveness unique to employees' individual circumstances and relevant to their particular life-stage and objectives.

Local variations include, for example:

- Benefit offerings in India included an extended family such as parents and in-laws to meet cultural expectations
- Private medical insurance in Gibraltar included dental coverage as there is no separate dental insurance available
- Where in-house training facilities exist, these are shown as a value/investment on employee TRS

In each territory, the benefit make-up was determined by:

- The global company approach
- The local HR team and, importantly, employee feedback
- Statutory requirements

The speed of implementation is also unparalleled: 7 countries launched in less than 12 months (UK, Gibraltar, India, Bulgaria, Austria, Sweden, and Israel), with the "just.rewards" platform marked the introduction of the very first flexible benefits program in Bulgaria.

Employees were also significantly involved in the transformation of benefits administration with on-going employee feedback offering a direct basis for future additional benefits and / or design options.

Finally, the technology was flexible enough to link all of the global rewards strategy systems (TRS, flex and voluntary benefits selection, global share plan and recognition scheme) maximizing value to employees by offering choice, innovation and flexibility.

**One or more testimonials from the purchaser of services and/or a third party (e.g., external to either nominated organization) providing evidentiary confirmation of the nomination**

"We're absolutely delighted with the launch of 'just.rewards' and have seen phenomenal participation rates, along with benefits and savings accruing. 'just.rewards' has already enabled us to harmonize seven different sets of employment terms and conditions."

- Phil Hutchinson, Reward Consultant at bwin.party

"It is hugely popular. It gives people the opportunity to nominate someone for a monetary award, or simply an e-card that says "great job.... Just one benefit has paid for the investment in the platform and the software."

- Debi Povey, bwin.party's head of reward

"Hey, I think 'just.rewards' is brilliant... I'm glad you had the vision, because it's such a useful tool. Being able to adjust the package and see the effect in real time is incredible. It's as easy as booking a flight. For example, I was paying £200 a month for health insurance I've never once used. Boom - gone. Plus there was a heap of stuff (critical illness, life insurance) I didn't even know I had. Quite a lot of people have said the same thing, too. Finally, nice work making it accessible from home. I don't know whether you had to win any battles to do that, but this is probably one of the best things about 'just.rewards.' I sat down with my partner and went through all the options with her, and she was really impressed by it. (Well she muttered something positive, but that's a big deal for her.) Anyway, 'just.rewards.' Well done to all involved."

- Ian, bwin.party staff member

**Be sure to provide details around the nominee's impact and the resulting outcomes, using specific numbers and metrics (where possible)**

A key objective was to enable rapid employee integration and transition when acquiring other businesses: there is now a clear process with strategy, procedures, policies and a standard template.

By standardizing the reward approach, global mobility has significantly improved with a 50% increase in relocations (YTD versus total 2011). 'just.rewards' was also the first visible initiative incorporating the new branding and demonstrated commitment to a single approach, eliminating the 'us and them' culture.

By proactively utilizing TRS to compete for talent at a higher perceived value, bwin.party is now able to talk about total reward rather than basic constituents.

Just a few months post-launch this unique, global, solution has achieved very high engagement and participation:

- UK: 96% login / 1.5 average flexes/employee
- Gibraltar: 94% login / 1.4 average flexes/employee
- India: 98% login / 1.5 average flexes/employee
- Bulgaria: 78% login / 60% flex
- Austria: 91% login / 85% flex
- Sweden: 82% login / 70% flex
- Israel 41% login

Cost savings include:

- Savings on existing licenses for reward Admin systems in excess of £300,000
- To date, saving of £37k (employers) and £32k (employees) in NIC through salary sacrifice
- Only one administration person rather than the several previously
- Created capacity to administer the new flexible reward scheme without having to increase staffing levels.
- Approximately 10% of the UK implementation costs offset as a result of commission coming back to the business

There will also be an anticipated estimated saving of 15% on total benefits bill through multi-national pooling arrangements (launching soon).

## **Talent Acquisition Programme of the Year**

### **Anheuser Busch InBev and Pinstripe & Ochre House – EMEA**



#### **A summary of why this customer relationship should be considered for the award**

Anheuser Busch InBev is one of the top five consumer products companies in the world generating annual revenues approaching a staggering \$40 billion and employing around 150,000 people. To ensure that the quality of its talent attraction and talent management remains at the very highest level the company had successfully partnered with outside experts in North America and in 2010 began looking for a similar arrangement for its European operations. After a very rigorous assessment process Anheuser Busch InBev entered into a three year relationship with Pinstripe & Ochre House, which has brought it cost savings, reduction in times to hire, consistent high quality of recruit and a compelling employer brand through the creation and implementation of imaginative, yet always delivery focused initiatives and programmes. On the basis of this the company has extended the relationship for at least another three years.

#### **At least three significant problems or issues that the buyer and provider together overcame in the course of delivering service and the methods or practices used**

1. Because of the very diverse nature of Anheuser Busch InBev's European region (which also includes non-continental elements, such as Cuba), local business units had developed their own individual approaches to talent attraction and acquisition leading to inconsistencies and a lack of uniform employer brand or employer value proposition. This in turn had led to a lack of clear and measurable information about such key elements as cost per hire and time to hire and concerns that the actual quality of hire might not be at optimum levels across the region.
2. The company has had a long history of sourcing and recruiting newly graduated MBAs from top business schools around the world to create a pipeline of high calibre international talent with the potential to fill senior management positions. However, as the MBA employment market began to shift towards the end of the first decade of the 21st century, with many of the best b-school graduates turning to options in new technology companies, such as Google and Facebook or choosing to follow the entrepreneurial route, there was concern that the company was not engaging with top schools and their students in the most effective and co-ordinated manner.
3. The company was keenly aware that in many areas of talent sourcing it was facing, and would continue to face, increasing competition for the best people. And it also understood that it needed to get on the radar of potential hires at the earliest possible opportunity to give it competitive advantage in the 'war for talent' and to allow it access to individuals who, whilst not required immediately, might allow it to develop new territories and new product and service lines in the future. However, the reality of the current picture was one of relatively short-term staff planning and, consequently, of tactical, as opposed to strategic hiring.

#### **The approaches and/or programs initiated through the relationship and how results were measured**

1. Given the dual nature of the challenge – namely to bring consistency to volume and specialist non-volume hiring – Pinstripe & Ochre House proposed and instituted a two pillar delivery system. This was made up of dedicated onsite recruiters focused on a number of key geographical markets in the region, such as the UK and Germany, supported by a Pinstripe & Ochre House centre of excellence based in the UK, but with in-depth expertise of all the target countries and fluency in local languages. This gave Anheuser Busch InBev the support, not only of a focused delivery team, but also of a wide range of specialists who brought their expertise to such key issues as community building, optimum use of social media in specific target groups and countries, and the development of employer branding messages which retained the key elements of Anheuser Busch InBev's business and people philosophy, but which also embraced local cultural, social and political influencers. Furthermore this more centralised model provided ABI with all the management

information it needed around the effectiveness of the hiring process, such as time to hire and cost of hire statistics. In order to ensure that Anheuser Busch InBev received best return on its investment, mass 'business as usual' recruitment was heavily based on 'self-service', underpinned by easy to use technology, while more business critical hiring was localised, closely involved ABI management on the ground and was increasingly oriented towards a talent pipelining, strategic approach.

2. Because the attraction and hiring of the very best new MBAs was becoming increasingly challenging given the competition from non-traditional players, such as the new technology companies, Pinstripe & Ochre House identified that constant, relevant engagement with target schools and specific students was not only desirable, but essential. Pinstripe & Ochre House therefore worked with ABI to identify and agree target institutions and individuals and the recruitment team then took over liaison, messaging and assessment. This now ensures that ABI has direct access to the most desirable candidates in every graduating class and is able to put over a compelling and successful employer value proposition.
3. Every company, whatever its size, is faced with the ongoing dilemma of balancing its immediate people needs with the necessity to develop a robust and effective talent planning strategy. One that is aligned to the long-term needs and goals of the business and which often needs to open up access to new and previously untapped professional communities. Pinstripe & Ochre House is helping ABI to move to address through the development of a talent pool programme, which reaches out to both active and passive candidates, *both outside and within* the company, to create pipelines of talent ready for access as specific needs arise. Known as the 'Hot Tub' approach, the model uses a very wide range of tools to engage with these internal and external target communities such as the Anheuser Busch InBev intranet and career site, job boards, and advertising, employee referral programmes, alumni programmes, 'silver medallist' programmes focused on near-miss candidates, targeted search campaigns, open days, events, professional networks and social media platforms.

#### **How the relationship has contributed to advancing the practice of recruitment**

In summary the relationship has delivered the following for Anheuser Busch InBev:

- a. An outsourced expert recruitment function fully integrated with the in-house HR function and covering both volume and non-volume hiring
- b. Coverage across all of the company's European region based on embedded recruiters in key markets and a centre of excellence based out of the UK
- c. An enhanced MBA recruitment programme capable of sourcing students from the world's top business schools
- d. Up-to-date and accurate management information
- e. Ongoing consultancy on best practice in the hiring industry
- f. Better engagement with hiring managers to 'win hearts and minds'
- g. In excess of 550 hires per annum
- h. Reductions in time to hire and agency use. Raising of level of internal hiring
- i. Dedicated executive search capability
- j. Robust and effective ATS
- k. A 'shared risk' model with Pinstripe & Ochre House fees directly linked to the achievement of agreed KSLs

#### **One or more testimonials from the purchaser of services and/or a third party (e.g., external to either nominated organization) providing evidentiary confirmation of the nomination**

"Perhaps the real test of any business relationship is whether you want it to continue or not. So perhaps it's enough to say that the success of the first three years has prompted us to sign up for another three."

"What Pinstripe & Ochre House has brought to our recruitment processes is excellence. They took a model that had too many different country or unit based approaches and have introduced consistency – in terms of employer brand, of the way we assess and treat candidates, of key management information. "

"What is so impressive is, not just how much they understand our business, but how they have become an extension of our business. Whenever I think of them I don't think of an outsourced provider, I think of them as my recruitment department, yet a recruitment department that has better access to external best practice than any internal function I can think of."

"Their ability to deliver, to make the hires we need when and where we need them, is of course vital. But so is their flexibility, their willingness to get done whatever is necessary, to advise and guide, to provide insight into what is

going on in the wider talent market. This is simply not a client-supplier relationship, it's something much more, much better.”

Toon Van der Veer, Director of People Continuity and Internal Communication

**Be sure to provide details around the nominee's impact and the resulting outcomes, using specific numbers and metrics (where possible)**

As noted earlier Anheuser Busch InBev felt that ongoing information about its recruitment performance had not met its demanding requirements before it entered into the relationship with Pinstripe & Ochre House. The provision of accurate and timely management information was consequently deemed a priority in the new model.

The reporting has highlighted the following tangible improvements in the talent acquisition process:

- Reduction of time to hire from 35 days in 2011 to 25 in 2013
- Percentage of hires sourced internally raised from 40% in 2011 to 51% in 2013
- Fully operational ATS – Lumesse TalentLink - implemented to accelerate assessment and improve candidate experience
- Percentage of vacancies outstanding after 60 calendar days reduced in key regions from 59% in 2011 to 10% in 2013
- Reduced agency cost 35% 2013 versus 2012
- Hiring manager interview training implemented across Western Europe to raise quality of hire and improve candidate experience

## **Talent Acquisition Programme of the Year**

### **Boehringer Ingelheim (BI) and Pinstripe & Ochre House – North America**



#### **A summary of why this customer relationship should be considered for the award**

At privately held global pharmaceutical organization, Boehringer Ingelheim (BI), the company's innovative culture drives business performance. Best-fit talent must possess a combination of imagination and initiative. BI is highly selective in its hiring, and as a result workforce retention is high among its 11,000 North American employees. In partnering with Pinstripe & Ochre House, and integrating a "recruitment prevention" strategy, the organization has achieved measurable strategic business results, process improvements and \$3 million in savings on agency fees resulting from the capability to increase direct sourcing across all categories. Beginning two years ago, to date, the highlight of the partnership came when the U.S. model (Pinstripe & Ochre House-BI partnership) was announced as BI's global operations "role-model" for talent acquisition.

#### **At least three significant problems or issues that the buyer and provider together overcame in the course of delivering service and the methods or practices used**

Although BI had previously leveraged Recruitment Process Outsourcing (RPO), the organization sought to evolve its talent acquisition function to provide greater business support and align with a talent partner that could supplement the innovation BI consistently strives to achieve. The company also desired a strategic RPO provider to proactively manage the internal and external change required to transform recruitment into a more sophisticated solution. BI identified a number of specific goals for their new talent partnership:

- Evolve talent attraction strategies and processes to improve candidate quality.
- Create a best-in-class candidate experience.
- Accelerate response time, visibility and communication with hiring managers.
- Implement the Taleo Applicant Tracking System (ATS) for more consistent recruitment management and transparency into analytics.
- Leverage innovative ideas and solutions to push the organization's talent acquisition practices forward.

#### **The approaches and/or programs initiated through the relationship and how results were measured**

Recognizing a cultural match, BI partnered with Pinstripe & Ochre House to transition immediate requisition fulfillment while simultaneously implementing an advanced, centralized recruitment process. Pinstripe & Ochre House and BI collaborated to design a proficient recruitment model, featuring a centralized process and a new, localized organizational structure for BI's recruitment function. For BI's major job functions—pharma commercial, technology and manufacturing, science, and corporate administration/support positions—there was specialized alignment and skill matching within the team to handle niche sourcing and screening needs.

BI's dedicated team overcame complex challenges during the transition, which laid the groundwork for continued success, trust and transparency throughout the partnership:

- Changing vendors and adopting continuous improvement – Pinstripe & Ochre House developed a well-defined plan featuring daily check-ins to transition more than 800 open positions across various locations, and to quickly respond to the new requisitions being opened each day. As the partnership matures, the dedicated team has continued to define and refine processes as well as procedures aimed at optimizing efficiency.

- Collaboratively launching new technology across BI – The Pinstripe & Ochre House-BI team led candidate and requisition history data migration from the previous vendor’s technology. The team also trained hiring managers on the use of this new technology, in addition to training internal employees on the capability to access status updates for positions they had applied for internally. They continue to maximize the use of these tools across all stakeholders to mitigate risk and improve reporting capabilities.
- Centralizing multiple locations nationwide – Each BI location had its own process, approach, culture and expectations regarding recruitment. During Solution Design and Implementation, Pinstripe & Ochre House’s data collection and due diligence were essential in understanding nuances and designing viable centralization. The team focused on enhancing communication with location leaders to gather their input and achieve buy in order to create a centralized process with localized support. As an example, the Pinstripe & Ochre House-BI team has had great success enhancing the partnership across multiple operating units that previously faced more significant challenges. Through collaboration and proactive, open-door communication, the team has positioned themselves as consultative partners, turning critics into raving fans.
- Increase in requisitions – Within the first three weeks of partnership, process centralization and integration of Pinstripe & Ochre House’s exclusive Talent Relationship Management (TRM) technology platform made BI’s true hiring needs highly visible. Pinstripe & Ochre House quickly scaled up its dedicated team to handle a 250% increase in requisitions, continuing to leverage their “organize, stabilize, optimize” strategy to drive open requisitions to completion—unhindered by constant fluctuations in requisition load.

### Communicating Change

Communication was the critical component in achieving a smooth transition and high engagement. The Pinstripe & Ochre House-BI team executed a comprehensive plan for tailored, meaningful communication to the different end users during each phase. Communication strategies focused on creating a shared need for change, and mobilizing commitment to the new process—keeping all relevant stakeholders informed, and establishing a mechanism to surface and address all issue as swiftly as possible. During the transition, 80% of the Pinstripe & Ochre House team visited BI locations to meet with hiring managers face-to-face. The team trained more than 1,000 hiring managers across six U.S. locations and completed more than 1,000 kick-off calls. Ongoing, targeted communication through numerous channels spearheaded the development of collaborative relationships between Pinstripe & Ochre House and BI’s hiring managers.

The team continues to reinforce the communication precedent that was set during partnership implementation by keeping stakeholders engaged and informed as the partnership continues to mature.

### **How the relationship has contributed to advancing the practice of recruitment**

The partnership team continues to elevate BI’s evolving recruitment function week after week, improving candidate quality; accelerating candidate and hiring manager response time; improving on key service level agreements (SLAs); and creating greater operational efficiencies. In addition, the program design maximizes valued recruitment tactics, such as referrals and ensures a positive candidate experience for both external and internal candidates. In the early phases of partnership, the team scheduled, on average, more than 200 interviews for hiring managers each week—a direct result of the consultation provided by Pinstripe & Ochre House on how to effectively shape and communicate BI’s unique employee value proposition. The team is proud to have decreased this measure to approximately 150 interviews per week—not because of a decreased fill volume, but as a result of the team’s increased efficiencies and direct sourcing accuracy. Ultimately, the team’s talent identification efforts have become more targeted, requiring fewer screenings to find the right hire.

Pinstripe & Ochre House’s seamless technology implementation has enhanced candidate communication and passive candidate sourcing. The team helped shape and define BI’s external messaging surrounding its employee value proposition. As the partnership continues evolve, the team strives daily to further transform talent acquisition into a distinct advantage for BI across the pharmaceutical landscape.

### **One or more testimonials from the purchaser of services and/or a third party (e.g., external to either nominated organization) providing evidentiary confirmation of the nomination**

“BI’s partnership with Pinstripe has been effective in transforming talent acquisition into a function that supports our culture and business objectives. The team constantly collaborates, modifying and enhancing our recruitment processes in order to achieve even greater operational efficiency and strategic alignment with the business. Together, we are finding innovative ways to solve our business issues and create a distinct competitive advantage for

BI across the pharmaceutical marketplace,” said Corry Ioli, Executive Director of Talent Management and Talent Acquisition for Boehringer Ingelheim.

**Be sure to provide details around the nominee's impact and the resulting outcomes, using specific numbers and metrics (where possible)**

Over the course of the first two years of partnership, by working smarter and leveraging Pinstripe & Ochre House’s tools, technologies and expertise, as well as empowering the team to own their roles, the partnership has witnessed:

- \$3 million savings in agency fees resulting from our ability to increase direct sourcing across all categories
- 25% reduction in average open requisitions per month
- 20% reduction in time-to-fill
- 25% reduction in average age of open requisitions
- 70% reduction in requisitions aged more than 90 days
- Increase in hiring manager satisfaction across all categories

## **Talent Acquisition Programme of the Year**

### **Bristol-Myers Squibb (BMS) and Alexander Mann Solutions – EMEA**



#### **A summary of why this customer relationship should be considered for the award**

Bristol-Myers Squibb (BMS) is a global specialty care BioPharma company with over 23,000 employees worldwide. It was named as 'The best Big Drug Company' of 2011 & 2013 by Forbes and one of 'The World's Most Admired Company in 2012' in Fortune.

BMS's corporate mission is to discover, develop and deliver innovative medicines that help patients prevail over serious diseases. Attracting, developing and retaining diverse and highly-skilled talent is central to BMS's success. In 2012 BMS went to market to find a new RPO partner to support their permanent hiring requirements in Europe. What makes the Alexander Mann Solutions RPO solution for BMS truly special is the extent to which the solution provides a 'white-glove', high touch and highly personalised service to Hiring Managers and Candidates.

In one short year, BMS and Alexander Mann Solutions forged a strong partnership and established a world-class Talent Acquisition function already exceeding all expectations.

#### **At least three significant problems or issues that the buyer and provider together overcame in the course of delivering service and the methods or practices used**

In a short period of time we have already achieved a number of successes and exceeded stakeholder expectation. Some of the highlights so far include:

##### Implementing a seamless pan-European RPO Solution

Prior to implementing the Alexander Mann Solutions RPO solution BMS Talent Acquisition was supported by an incumbent supplier providing recruitment administration from a single off-shore location. The transition to a much more sophisticated and geographically complex solution would therefore present multiple challenges.

BMS is a highly sophisticated organisation for which Talent Acquisition is a critical function and it was essential that the solution was launched smoothly with a minimum of disruption to business as usual hiring. The new solution went live, on schedule and on budget, at the start of January 2013 with a dedicated team of over 30 Talent Acquisition specialists spread across 8 locations and 6 countries in Europe. The transition from the incumbent supplier was seamless and the joint communication plan ensured that HR and Hiring Managers were guided through the process of transition in an extremely positive way. The BMS embedded HR team embraced the new solution and played a key role in supporting with the on-boarding and training of new Alexander Mann Solutions team members.

##### Putting a team in place that really understands BMS and their sector

Given the complex and specialist nature of BMS' business it was critical that the chosen partner was able to bring an expertise in the industry and the local markets.

BMS and Alexander Mann Solutions have created a fruitful and successful partnership that's bringing out the best in both parties. In fact, though they are quite different, there's a lot of similarity between BMS and Alexander Mann Solutions with both companies sharing a similar culture and similar values. The embedded team Alexander Mann Solutions put in place matched BMS needs perfectly. Together the new team had a combined experience of over 40 years in life science recruiting and, thanks to all their experience in this field, they were soon working seamlessly with BMS and supporting their Talent Acquisition requirements for Europe. The Alexander Mann Solutions management team has been structured in order to empower the talent acquisition specialists in country and give them the opportunity to do what they do best – identify the best talent from local and international talent pools.

### Flexibility to upscale or down scale on demand and to customize to business needs and geographies

This point has significant importance and is something that was demonstrated throughout the year. As well as recruit an additional two full-time recruiters for the embedded team, there has also been flexible support available for sourcing and administration to deal with peaks in workload. For example, a significant hiring campaign for a BMS manufacturing team meant that Alexander Mann Solutions had, for a short period, double the recruitment and contract administration workload at one location. Thanks to the flexibility available, this was successfully managed without any difficulty and with positive feedback from stakeholders involved. Equally when BMS made a strategic decision to increase hiring in Switzerland (a country with historically low hiring volumes for BMS and as such not part of the original RPO solution), Alexander Mann Solutions was able to deploy a Talent Acquisition Specialist onsite in Switzerland to support the growth within two months and ahead of the demand hitting.

### Reducing the cost of agency hiring

A key way to gauge the success of the BMS - Alexander Mann Solutions partnership would come from areas such as cost savings. Here the challenge was to achieve savings through a reduction in agency hiring from 50% of external hires in 2012 - and in this the Alexander Mann Solutions team achieved a phenomenal reduction from 50% to just 9% in their first year; greatly exceeding the original business case. Not only did this achievement provide a reason for the Alexander Mann Solutions and BMS team to be proud of their work, but it also created positive feedback to strategic stakeholders about the success of the partnership to date and the benefit on bottom line. This reduction in agency usage was achieved through expert passive candidate sourcing, through the quality of the Alexander Mann Solutions recruiters who provided a personalised service to candidates and through the trust that was so quickly built with Hiring Managers who no longer felt the need to immediately engage external agencies but had the confidence in the capabilities of the Alexander Mann Solutions team to source and engage the best talent in the market.

### **The approaches and/or programs initiated through the relationship and how results were measured**

“At the heart of our BioPharma strategy has been a firm commitment to innovation – one that not only drives our growth; it also defines our company.”  
Lamberto Andreotti, CEO BMS

Innovation is key to the service that Alexander Mann Solutions delivers. The need for efficient identification of high quality talent, effective engagement, as well as ensuring the story and strategy of BMS was effectively portrayed – all this required innovative thinking. Innovation was also achieved by closely matching the Alexander Mann Solutions systems, processes and activities to BMS needs. Some of the activities and innovative approaches have included;

1. Creating a clear picture of the sourcing requirement. Part of our white-glove service to BMS is the embedding of our Talent Acquisition Specialists locally, within the BMS business. Alexander Mann Solutions recruiters, together with the retained BMS Talent Acquisition Leads in each country don't just support Hiring Managers but are there to consult with Hiring Managers and that often starts before the point that a requisition is approved. Strong relationships have been built between the recruiters and hiring community so that recruiters know, first hand, exactly what the hiring manager requires when they hire.

Because they are embedded onsite, the Alexander Mann Solutions team has ongoing relationships with the hiring community. Collaboration is key within BMS and the Alexander Mann Solutions team lives this value – quickly building a strong understanding of the different BMS businesses and teams. This information has helped them achieve greater hiring manager satisfaction as well as deliver an agile and flexible process. It has also allowed recruiters to begin a search or create a talent pipeline before requisitions are approved, which has had a significant impact on time to hire metrics.

Measures: Formal, quarterly customer satisfaction reporting from hiring managers. Hiring managers were asked about their overall impression of the talent acquisition team as well as the touch points during the process. It was reported on a quarterly basis and any significant comments were followed up and this aided further development of processes, relationships and delivery. Hiring Managers satisfaction in the year was measured at 85% of Managers rating the service as Excellent or Good. Such a measure of stakeholder satisfaction had never been implemented in BMS and proved to be a highly valuable gauge of success. Time to hire for 2013 averaged just 34 days –incredibly low for the industry and well below the time achieved prior to the Alexander Mann Solutions solution.

2. Continual service optimisation. Alexander Mann Solutions doesn't just pay lip-service to stakeholder satisfaction surveys but makes the feedback an integral part of their continuous improvement agenda. By

reviewing survey results and candidate commentary – from both successful and unsuccessful candidates – the Alexander Mann Solutions team could tweak any issues based on feedback on the talent acquisition process. This ensured a consistently positive image of the experience at BMS, regardless of whether or not candidates were hired.

Measure: Quarterly formal feedback from both successful and unsuccessful candidates. Candidate satisfaction in the year was measured at 81% of all Candidates rating their experience as Excellent or Good.

3. Creating the right experience for new starters. There was a shared BMS-Alexander Mann Solutions responsibility for creating a positive experience for new hires and this went from recruitment and pre-hire, right through to +1 year employment. This was achieved by the Alexander Mann Solutions team supporting onboarding improvement projects and ensuring that the EVP communicated was also reflected in their experience.

Measure: Working on onboarding improvement projects with a view to improving the new hire experience from pre hire through to the end of year 1. A formal retention SLA is also in place to track the number of new hires retained for at least 6 months.

4. Talent pipelining in support of key talent. With the expertise of Alexander Mann Solutions, BMS created a fully embedded team – able to headhunt niche skills in a range of competitive markets across Europe – while also providing a positive experience to both candidates and managers. To achieve this, understanding the talent in the market was essential. By mapping local and international markets for key talent, recruiters could collaborate to share market intelligence and feed this intelligence back to the business. This was pivotal in the success of the team - not only in the very low use of recruitment agencies, but also in the teams' credibility with the Hiring community.

Measure: Qualitative and quantitative reporting on the strength of talent pipelines as mapped against workforce demand plans.

### **How the relationship has contributed to advancing the practice of recruitment**

Through sector expertise: together BMS and Alexander Mann Solutions wanted to build an agile, specialist team that was embedded in the business. The team that was created had over 40 years experience in pharmaceutical and life science, was fully operational almost overnight, and was able to bring real added value to the talent acquisition function. This team had to be highly effective in a short space of time and through proactive talent pool generation, sourcing innovation and management they achieved significant results – right up to recruiting at Director level.

Through robust performance measurement: in order to monitor the effectiveness of their activity and to ensure visibility, BMS developed governance structures and KPIs. The KPIs measured time to hire as well as direct hiring and the quality of the candidate slate. In addition, operational effectiveness measures were enabled by the ATS, such as time to review applications, time to shortlist and time to first interview. These measures have allowed access to the full recruiting process at BMS and ensured that the activity is closely monitored for improvements. Meaningful management information from Alexander Mann Solutions also helped guide decisions and allowed better control of cost, time and quality.

Through continuous improvement and operational excellence: throughout the year, it was important to ensure continuous improvement of processes and technology. Working with an integrated ATS and establishing processes put in place against global compliance standards has ensured a consistency of approach not just across Europe, but globally. Here the talent acquisition teams have been able to localise processes with the kind of flexibility that makes allowance for local talent and market considerations. Feedback from recruiter forums, as well as through understanding hiring manager and candidate satisfaction has allowed the team to measure the effect of the processes. This focus on efficiency was one way that time to hire was maintained within target.

Through innovation and a consistent focus on enhancing BMS' recruitment brand: across Europe, communications have consistently reflected the BMS brand in every single touch-point in the talent acquisition process. In 2013, one activity to support this was the creation of branded prompt cards that enabled every recruiter to recall all the key selling points of BMS. It's these points that BMS are most proud of and the things we really want candidates to know about. The cards also provided country specific data and they ensured the team could localise their communications.

Through research and market intelligence: in order to effectively communicate with and ultimately attract talent in the BioPharmaceutical market, it is important to understand it. So Alexander Mann Solutions also carried out detailed

market intelligence on a bi-annual basis and thereafter published a research paper directly from the talent acquisition team on activity of competitors in relevant therapy areas.

Through strategic partnership: the partnership between Alexander Mann Solutions and BMS is a strategic one; at the outset of our relationship we co-designed a three year strategic roadmap that would take the service and partnership from Operational Effectiveness to Strategic Advantage. That roadmap is reviewed on a quarterly basis and both parties are proud of the progress made to date.

**One or more testimonials from the purchaser of services and/or a third party (e.g., external to either nominated organization) providing evidentiary confirmation of the nomination**

Unsolicited Customer Feedback about the Alexander Mann Solutions team in 2013:

'I wanted to let you know what a great experience it was to work with Dora on staffing my critical role in EU. Over the past 16 years I have had the opportunity to work with many HR staffing specialist and I have to say that Dora is one of the best I have ever worked with..'  
Executive Director, BMS France

'Thank you very much! We all have a lot on our plate so it is the time for going the extra mile. Alexander Mann Solutions are giving full support and flexibility.'  
HR team member, BMS Spain

'I would like to thank you for helping me ... with professionalism, expertise and enthusiasm.'  
Senior Manager, BMS Italy

Feedback of Dario D'Attilio - Director Talent Acquisition, Europe

In 2012 BMS embarked on a journey with Alexander Mann Solutions. We selected Alexander Mann Solutions as our talent acquisition partners for a number of reasons including;

- Their proven industry capability
- Unrivalled geographic capabilities – particularly experience in implementing multi-country solutions and managing complex geographically dispersed teams
- Operational Excellence – Alexander Mann Solutions are one of the biggest users of Taleo in the world
- Innovation, particularly when it comes to sourcing
- Culture – we could see a real synergy between the two company cultures

Through our partnership with Alexander Mann Solutions we seek to achieve the following;

1. An agile, specialist team
  - Dedicated geography and skill-set specialists
  - Branded and embedded in BMS business
  - Focus on value creation
  - Flexible to changes in demand by skill or geography
2. Sourcing Innovation
  - Proactive talent pool generation and management
  - Focus on managed shift to increased direct sourcing
  - Agency performance management
3. Visibility and Effectiveness
  - Governance & KPIs
  - Meaningful MI guiding decisions
  - Market intelligence
  - Greater control of cost, time and quality
4. Improved Processes and Technology Optimisation
  - Compliant global process with localizations
  - Technology optimization
  - Measurable Candidate Assessment
  - Benchmark, best practice, and innovation

5. Brand Effectiveness

Every single touch-point reflects your brand and reinforces your EVP  
Candidate profiling  
Employer brand penetration

6. Stakeholder Delight

Hiring Manager / HR empowerment and added value  
Reduced time and effort for the business  
An exquisite candidate brand and recruitment experience

Our partnership over the past year has delivered against each of the key points mentioned above and to do this so early in the co-operation was beyond our expectation. To already have significant value being added in areas such as direct hiring as well as talent mapping and market intelligence supporting strategic business goals has meant a lot to our business. It is true to say that in year one together BMS and Alexander Mann Solutions achieved more than we all thought was possible in that timeframe. We will continue our work attracting individuals who can be empowered to be decisive, innovative and collaborative in return for an enriching experience at BMS. Pivotal to this strategy is our collaboration with partners globally, and for Talent Acquisition in Europe, with Alexander Mann Solutions.

Feedback of Catherine Blachere – BMS VP HR Europe

When I consider the results of our partnership with Alexander Mann Solutions, I am extremely satisfied with what we have achieved together. By bringing in expertise through the outsourcing of sourcing & staffing to an external provider, we have brought in expertise that we would never have managed to develop internally at the same level. In doing so, we are much more effective and we contribute to the success of the business. Having chosen to host these external resources on site is a key element to our success. The Alexander Mann Solutions team feels part of the BMS Human resources organisation and this brings motivation to all. . The results after our first full year together are evidence that, in a short period of time, we have already achieved very significant milestones and turned around our Talent Acquisition support to the business. As we continue to engage people with diverse perspectives to shape our future, we will continue to rely on our partnership with Alexander Mann Solutions.

## **Talent Acquisition Programme of the Year**

### **Capgemini and Randstad Sourceright – EMEA**



#### **A summary of why this customer relationship should be considered for the award**

This was a new partnership in 2013 and such is the strength of the relationship between Randstad Sourceright and Capgemini that it has resulted in the stakeholders from both organisations being jointly branded as the 'One Team' throughout Capgemini. This was fostered through working collaboratively to ensure the transition was completed successfully from initial engagement and aligning Randstad Sourceright's objectives as the provider to those of Capgemini's HR workstreams, ensuring that the 'One Team' is aligned and achieving the same strategic and operational goals.

#### **At least three significant problems or issues that the buyer and provider together overcame in the course of delivering service and the methods or practices used**

With more than 120,000 people in 40 countries, Capgemini is one of the world's foremost providers of consulting, technology and outsourcing services. In the provision of services to their clients they require the best talent available which means recruitment is at the top of their business agenda.

Even though this was a new partnership in 2013 a number of solutions have already been delivered:

1. **Significant growth in the business:** 2013 saw a sharp increase in recruitment requirements for Capgemini and a significant number more than both Randstad Sourceright and Capgemini had forecast as they first entered into the partnership. Together the 'One Team' worked to ensure that Randstad Sourceright could demand plan by understanding the priorities of the Capgemini business which allowed Randstad Sourceright to focus their strategy on building capability and to translate demand into delivering a smart sourcing effort.
2. **Direct Sourcing:** Capgemini agency usage was a much higher level than they desired which meant that they were not capitalising on their strong employer brand and engaging with the right candidates. Randstad Sourceright used appropriate and innovative direct sourcing methods that saw a significant increase in direct hiring numbers and subsequent quality of candidates.
3. **Hiring manager buy-in:** Prior to Randstad Sourceright partnering with Capgemini, there were mixed views about an outsourced recruitment service. Randstad Sourceright worked with each Capgemini business unit to understand their strategy, and then shaped the recruitment approach to help ensure it was achieved. This included building talent pools aligned to future demand, streamlining the assessment process and introducing structured campaign management methodology. The improvements have resulted in a decrease in the time to hire and an improved experience and feedback from hiring managers and candidates.

#### **The approaches and/or programs initiated through the relationship and how results were measured**

Randstad Sourceright worked together with Capgemini to develop a vision for the recruitment service. The vision was titled 'Platinum', and was underpinned by a programme of continuous improvement activities designed to move the service to a best in class recruitment function. The Platinum Programme ensures that the commercial objectives of the provider are aligned to the recruitment priorities of the organisation.

The programme takes into account the employer brand, talent pooling, process tools & technology, hiring process efficiencies and the Capgemini talent profile that is all underpinned by continuous enhancement and innovation of the service.

Results are measured at all touch points which has resulted in a higher number of direct applicants, shorter hiring process and greater hiring experience for both the hiring manager and candidate.

### **How the relationship has contributed to advancing the practice of recruitment**

Through the process of implementation and embedding the Randstad Sourceright team into the account, the 'One Team' ensured that the objectives of Randstad Sourceright as the provider would be aligned to Capgemini's HR workstreams. Whilst many organisations and providers work in partnership, few align the business [commercial] objectives of the provider to the recruitment objectives of the client.

By understanding the objectives of the Capgemini business, in particular their resourcing and talent goals, Randstad Sourceright have been able to develop an approach that effectively translates demand into delivering a smart sourcing effort.

This has a number of benefits but in recruitment terms this ensures the two organisations are working together to provide the same end result – that Capgemini are engaging the right skills and at the right time to meet their business objectives.

### **One or more testimonials from the purchaser of services and/or a third party (e.g., external to either nominated organization) providing evidentiary confirmation of the nomination**

"Our new partnership with Randstad Sourceright has developed during the past year. We have a shared objective, to deliver a recruitment service that exceeds the expectations of our internal and external stakeholders, and have worked collaboratively and transparently to move towards this vision. Randstad Sourceright's focus on giving our candidates and hiring managers the right experience has resulted in a rising trend in candidate and hiring manager satisfaction and the continuous improvement in the service through the realisation of the Platinum Programme. The programme is at the heart of all we do as it is how we keep the recruitment approach fresh – if the service isn't agile and innovative then our relationship simply wouldn't exist," Anouska Ramsay, Head of Talent, Capgemini.

### **Be sure to provide details around the nominee's impact and the resulting outcomes, using specific numbers and metrics (where possible)**

Randstad Sourceright fully supported the delivery of Capgemini's business objects whilst introducing innovation & insight.

Key highlights include:

- Implemented BU specific sourcing & attraction strategies and delivered significant Direct Hire growth; 180% growth and ahead of KPI target across all BUs
- Supported the wider business objectives of Capgemini which also had an effect on direct hiring; Diversity, Employer Brand, KPI/Reporting, Project Management, Learning & Development to ensure that recruitment priorities were met
- Efficiently and effectively up-scaled the team resulting in successfully hiring 59% more employees in the first service year than anticipated
- Ensured that there are milestone touch points that improved Hiring Manager & Candidate experience: 95% of Hiring Managers & 93% of Candidates now rate the recruitment service as 'Good' or 'Excellent'

## **Thought Leader of the Year**

**Bruce Morton**  
**Allegis Group Services**  
**North America**



### **A summary of why this nominee should be considered for the award**

Bruce has over 30 years of experience in the human capital and workforce management space. Recognised as a thought leader in the realms of the evolving workforce, employer branding and social recruitment, Bruce partners with clients to bring them transformative talent acquisition solutions.

As Allegis Group Services' (AGS) Head of Innovation, Bruce champions the development of new products and capabilities, from ideation to market delivery. These new solutions help organizations innovatively source and engage top talent and transform their employer brands. Bruce has helped business leaders navigate the emergent social media realm and, in doing so, has created measurable results.

Bruce's latest and most impactful innovation is 21st Century Resourcing: a dynamic social recruiting technology platform that, for the first time, integrates top technologies to create, engage and measure thriving talent communities; diverging from traditional static methodologies. This platform creates a premium experience for both business stakeholders and candidates alike.

### **At least three major contributions the nominee has made and the specific impacts they had on the practice or state of HR transformation and/or the HRO industry as a whole**

21st Century Resourcing (21R): Bruce's creation of the 21R platform has revolutionised the way talent acquisition professionals look at holistic recruiting and resourcing. The platform integrates top social media and web 3.0 technologies into one integrated dashboard. It allows end users to create, engage and measure thriving talent communities, creating a premium experience for both business stakeholders and candidates alike. The use of 21R results in not just improved time to hire rates but also better quality candidates.

jobsUview: jobsUview is an AGS proprietary application, it was created to visualize the language of talent acquisition. Candidates are now "consumers" of work much like they are consumers of products and services. To truly engage "talentsumers" job advertisements can no longer be text based (as they are not always read in the online environment). Job advertisements need to be visual and sharable throughout the web 2.0 and 3.0. jobsUview is a scalable, user friendly solution that creates infographic or visual job advertisements. The application was launched in

March 2013 and has enabled clients to improve their engagement and click-through-rates among some of their most difficult to fill roles.

Collaboration: As the contingent labour workforce continues to grow, Bruce has innovated methods of collaboration for efficiently and effectively handling this new recruiting paradigm. These include integrated talent solutions and helping companies understand the importance of 'Organisational Readiness' enabled by talent, the new competitive advantage.

With a growing contingent labour workforce comes an increasing need to determine who will oversee the vast majority of these workers, as they do not fit the traditional full time profile. Bruce identified the need for collaboration between HR and Procurement, in terms of management of this expanding contingent pool. He recognised and evangelised the 'Changing Social Contract' to help organisations understand what's behind the growing contingent workforce. He also identified how Employer Branding for contract workers can be a beneficial method of improving the contingent employee value proposition.

Bruce has championed the use and development of Employer Branding strategies into a unique business line. He realised a need for a robust Employer Branding programme and the importance of employee value proposition to our customers. His work in this area has included a pilot programme for contract labour Employer Branding and improving existing RPO Employer Branding opportunities.

**At least three approaches and/or programs initiated by the nominee and how the results were measured**

21st Century Resourcing: 21R was implemented with major RPO clients; it has improved already stellar client satisfaction with AGS solutions. The integrated 21R systems have been an appealing value-add for RFPs and potential clients making the platform a huge success, improving the efficiency of sourcing for our RPO clients.

Integrated talent solutions: Bruce's years of watching developing market trends has positioned him in enabling Talent Acquisition stakeholders in their preparation for the future demands of the evolving workforce. Bruce led the charge in the recently published Human Capital Institute (HCI) research, When Worlds Collide, HR & Procurement Managing Contract Labour. The research, which surveyed HR and Procurement Directors, addresses emerging challenges in enterprise organisations and highlights the value of a collaborative approach to managing contract labour in the new world of work.

Employer Branding: Tackling the world of Employer Branding for the contingent workforce is a difficult task (due to co-employment laws), but Bruce's plan's for integrating employer branding into MSP programs aims to be a valuable piece of our offering.

In terms of RPO, Employer Branding has become a robust and essential piece of each client's talent solution. With a dedicated employer branding team, Bruce has been a trailblazer in turning this into a significant offering.

**At least one article, whitepaper, speech, or other published material or content available to the general public authored by the nominee. If possible, provide the full text, name of periodical or forum, and date of publication or presentation.**

Ask the Experts: Interview with Outsourcing Institute <http://www.allegisgroupservices.com/blog/ask-the-experts-bruce-morton-sits-down-with-outsourcing-institute.aspx>

Transformative RPO Whitepaper

<http://www.allegisgroupservices.com/landing/transformative-recruitment-practices.aspx>

**How the nominee has contributed to advancing the practice of HR transformation and/or the HRO industry as a whole**

Over the last 30 years Bruce has shared his unique perspective on the industry to help HR and Talent Acquisition professionals plan for the future of their permanent and contingent workforce needs.

Bruce has enabled organisations to go to market in the best possible way, from an employer brand perspective, so as to stand out from competition and attract, recruit and retain the best talent. Through speaking engagements and the production and promotion of content and thought leadership Bruce has significantly contributed to the industry.

His ideation of jobsUview visualizes the language of talent acquisition. It engages “talentsumers” and completely reworks the idea of a job advertisement. In an ever interactive world content needs to be both visual and sharable and not just readable.

Bruce's creation of the 21R platform has truly revolutionised the way talent acquisition professionals look at holistic recruiting and resourcing. Its use of and integration of top technology streamlines the experience of candidates, recruiters, stakeholders and organisations.

His experience in the human capital and workforce management space and ideas on HR, Procurement and managing contract labour have contributed to industry wide thinking and solutions. Solutions which help organizations innovatively source and engage top talent and transform their employer brands. Along with Bruce's innovative methods of collaboration to efficiently and effectively handle recruitment Bruce's approaches to Employer Branding strategies are also renowned for their impact on the industry.

**One or more testimonials from a third party (e.g., external to the nominee's own organization) providing evidentiary confirmation of the nomination**

“Bruce Morton has been actively engaged with SIG for the past three years, and is widely considered to be one of the best speakers at our events. His outstanding thought leadership is delivered with knowledge and passion, and has been so highly rated that we've asked him to keynote at a variety of global and local events. It is because of his willingness to share expertise and desire to improve the industry as a whole that we also recently invited him to participate on our Advisory Board. Bruce is highly-deserving of this award, and we are privileged to be able to write a testimonial on his behalf.”

– Dawn Evans, President and CEO of SIG (Sourcing Interest Group), the Original Executive Sourcing Network

"I have worked closely with Bruce Morton, for over two years, on strategically deploying next generation technology in the RPO/MSP space. Time and time again, Bruce always has a vision in his approach to servicing his clients with the 'latest and greatest' strategic initiatives and best of breed technologies.

Simply put, Bruce makes the 'new and unknown' seem very simple, and completely rational! I have witnessed first-hand, the reaction from Industry Leaders to Bruce's vision of where the markets for RPO/MSP are today, and how they will transform in the future.

Bruce has a unique and keen skill set. He balances knowledge, excitement, passion and professionalism in a highly receptive manner to the marketplace. Bar none, in my opinion, Bruce Morton is the BEST at delivering market leading Innovation in RPO/MSP to large audiences of Stakeholders in our Industry.”

– Julian Boylan, Senior Vice President of Global Markets at Avature, "Game changing technology for creative recruiting"

“Bruce Morton has a unique grasp on the entire employment lifecycle, a keen understanding of the hiring needs and human resource challenges of various types of organizations, and a refreshing perspective on the reality of where the employment world is today and where it is ultimately going. More than a thought leader, Bruce is a trend-setter and pioneer in this space, who is driving much needed change among employers across the globe, and is invaluable to his clients and anyone who is the recipient of his advice.”

– Frank Casale, Founder & CEO, Outsourcing Institute

**Be sure to provide details around the nominee's impact and the resulting outcomes, using specific numbers and metrics (where possible)**

Bruce's knowledge of attracting and retaining talent quickly and effectively with the necessary industry knowledge, skills and cultural fit positively impacts business results. The results of 21R underscore the impact social media can have in reaching highly-segmented and targeted candidates. Statistics include a 600% improvement in passive candidate activity. 48% increase in employee participation in our Employee Referral Program and a 55% increase in the talent community membership quarter over quarter. Without Bruce's creation of the 21R platform, this successful outcome wouldn't be possible.

Bruce's collaboration with jobsUview, gives recruiters an effective platform to create a compelling visual job description opportunity, which provides a quicker comprehension. Allegis Group Services received a 38% increase in applicants with a visual job description as opposed to a text job description thanks to the jobsUview platform.

## **Thought Leader of the Year**

**Shelly Singh**  
**PeopleStrong HR Services**  
**Global**



### **A summary of why this nominee should be considered for the award**

Ms. Shelly Singh is the Co-founder and Chief Business Officer of PeopleStrong HR Services. She has made significant contribution in the field of HRO. She has spent almost 7-8 years in this industry and has given a new dimension to the way HRO operates in India. She is the first woman member on the board of PeopleStrong, member on the board of Wheebox and National Treasurer, NHRD. Right from cracking large deals for her company to delivering service excellence, her role has fetched her appreciation from the client innumerable times.

### **At least three major contributions the nominee has made and the specific impacts they had on the practice or state of HR transformation and/or the HRO industry as a whole**

Shelly helped in building a Business Analytics Tool under the name of ALT Infer which has the capability of pulling data from online tools, excel etc. and can give near real time analytics at a single click. It eased out the path of HRs to board room by having an overall business knowledge and giving objectivity to HR processes.

The nominee explains the Glocal approach to HRO where the client can outsource the HR Services to a vendor located outside the country. Thus geographic boundaries do not hold a barrier for a new entrant anymore. This was a revolutionary approach to HRO in the time when companies have less confidence on outsourcing in-house and sensitive activities.

She made significant contribution in the field of HRO by introducing practices of Recruitment Shared Services-RSSC where the sourcing remains with the client while all other less value adding activities are outsourced to vendor.

### **At least three approaches and/or programs initiated by the nominee and how the results were measured**

Shelly designed and launched India's first skill report in association with government body CII which was launched in November 2013. The report surveyed students from across the country and published demography wise availability of talent. It not only helped the government in diverting the focus to areas having less talent but also helped companies in strategically deciding where to focus the hiring process.

She was also involved in shaping the new model for Best Companies to Work for Survey in association with Business Today where she designed a unique framework of Perception-Aspiration-Reality. For the first time in history of

country the data was collected from employers as well on metrics integral to organization. It helped in bringing employers and employees on the same table of evaluation.

Shelly brought in automation the way Recruitment Process Outsourcing, HRO and Payroll works in India. A large number of small and big processes were automated to ensure a timely delivery and client satisfaction.

**At least one article, whitepaper, speech, or other published material or content available to the general public authored by the nominee. If possible, provide the full text, name of periodical or forum, and date of publication or presentation.**

Data is becoming increasingly important to drive predictability in the recruitment process

Research quotes that every wrong hire costs the company three times as much as the actual cost of hiring him/her. Globally, organisations are experimenting with talent acquisition in terms of technology, demand, social media and the overall outlook on the process. But all of this is futile without getting a solid handle on the numbers and data. There isn't a better function in the HR domain where you can have fun with numbers. Attempts to measure the metrics will make it an objective process, thereby creating better predictability for both outcome and output. I would attempt to illustrate with three myths that all of us experience in recruitment.

#### Recruitment is an art

Recruitment is a "data-based decision making process". A systematic recruitment technique rests on a sumptuous pool of candidates' profile. However, that is the only artsy side of recruitment; the rest is all science – the science of demand-supply. The term art signifies the diligence of recruiter in drawing inferences out of data history, which is 70 per cent objective, service-level driven, well-governed and monitored process.

#### Talent is just in time

Lack of predictability has hampered recruitments. Imagine the delight if you are able to forecast demand with 80 per cent accuracy in time and skill-sets. Talent requirement of the company is all about meticulous planning. One size doesn't fit all and a size that fits well today may need to be altered at a later date.

#### There is no right metric

Most of the recruitment metrics are limited purely to record management and hindsight. The metrics would be decided on three main dimensions:

- Hindsight - The "What": Analyse what is happening. Understand the efficiency of the current systems and architecture. Cycle time, fulfillment ratios are some of the metrics that will give you hindsight.
- Insight - The "Why": Investigate the exact or the probable reasons of the occurrence of an event. CV adequacy ratios, source vs channel performance will give you the insights for better decision-making.
- Foresight - The "How": The foresight aspect will take into account the "how" factor as to how things will shape up in future. Probability ratios of fulfillment, impact on sales revenue numbers, employee productivity in 12 months will be some of outputs you can expect when you start looking at the foresight.

Ultimately, it's not what you implement but how you implement with a consistent approach that would make the change for you. In conclusion, I would say in God we trust, everyone else brings the data.

People Matters, July 2013

**How the nominee has contributed to advancing the practice of HR transformation and/or the HRO industry as a whole**

Shelly has brought in significant changes by bringing in perspective of business analytics. A company who is apprehensive of outsourcing its HR transactional activities started sharing the HR and business related data for the sake of in depth analytics which helped organizations taking major decisions. It not improved the functionalities but also helped the function having keen insights to serve on the platter. She recently addressed a National level HRO

event where she not only discussed this new dimension of HR but also helped the HR heads in settling their apprehensions and myths about the concept

**One or more testimonials from a third party (e.g., external to the nominee's own organization) providing evidentiary confirmation of the nomination**

Ms. Shelly has been a key contributor in the field of HRO industry. She has brought in innovative methods, the way HRO operates in country introducing flavor of automation and business intelligence. She and her team successfully manages the project transition and ensures that all I's are dotted and all T's are crossed at all levels. She is objective in her approach and understands where the benefits and the limitations lie in an outsourcing industry. Her acumen towards value addition will take HRO in general and PeopleStrong in specific to places.

## **Thought Leader of the Year**

**Ken Sperling**  
**Aon Hewitt**  
**North America**



### **A summary of why this nominee should be considered for the award**

Leveraging Aon's existing relationships with insurers and employers, administrative capabilities and market expertise, Ken was one of the driving forces behind the creation of Aon's innovative private health exchange, the nation's only multi-carrier, fully insured private health exchange for large employers. More than 600,000 employees and their families enrolled in health benefits through the Aon Active Health Exchange in 2014, and Aon's pioneering capabilities in this area accelerated a new market. A recent report by Credit Suisse estimates that the projected enrollment in private health exchanges will jump from 1.1 million in 2013 to 40 million employees in 2018. Ken is the industry's foremost thought leader on the private health exchanges. He's been featured in hundreds of media outlets, appeared on national TV outlets, served as a guest lecturer at the Harvard Business School, and has presented at dozens of industry conferences on the topic of exchanges.

### **At least three major contributions the nominee has made and the specific impacts they had on the practice or state of HR transformation and/or the HRO industry as a whole**

- Helped shape a new market in the HR Outsourcing industry. Ken was the thought leader behind the Aon Active Health Exchange, the industry's first multi carrier private health exchange for large employers featuring fully insured plans. Since launching the Aon Active Health Exchange in 2012, the market has grown rapidly, with multiple organizations launching exchange-type models. According to Accenture, more than 40 million Americans will purchase health insurance through private exchanges by 2018, up from 1 million in 2014.
- Positioned Aon Hewitt as the leader in private health exchanges. Under Ken's leadership, Aon significantly grew employer participation in the Aon Active Health Exchange over two years. In 2013, the number of large employers participating in the Aon Active Health Exchange, including Sears, Darden and Walgreens, was five times the number that participated in 2013. Enrollment tripled, with more than 600,000 U.S. employees and their families covered under plans in the Aon Active Health Exchange in 2014.
- Because private exchanges were new concepts, there was massive confusion in the industry about what they were and how they worked. The launch of public exchanges through the Affordable Care Act further elevated the level of confusion that existed not only in the general population, but also with key members of the mainstream media and the government. Ken has been instrumental in educating key stakeholders, including employers, employees, media, government entities and carriers, on private exchanges and how

they differ from public exchanges. In 2013 alone, he has met with dozens of organizations and employers to educate them on private health exchanges and the benefits these models offer to employers, employees and carriers.

**At least three approaches and/or programs initiated by the nominee and how the results were measured**

Because Aon's private exchange model was the first of its kind in the nation, Ken needed buy-in from employers, carriers and Aon's leadership team that the model and concept could be successful.

- Employer participation – In January 2012, Sears, Darden and Aon were the first three companies to enroll in benefits in the Aon Active Health Exchange. One year later, company participation was five times higher, with 18 large companies, including Walgreens, signed on. This fall, more than 600,000 employees and their families enrolled in health benefits through the Aon Active Health Exchange, more than double that of 2013.
- Carrier participation – To bring a multi-carrier private exchange approach to life, Ken and the Aon team needed to enlist and engage the insurance companies, as no employer would come into the exchange if the total cost under the exchange was higher than their current self-insured approach. There were several hurdles they needed to overcome to attract insurance carriers to participate, but Ken and his team leveraged their strong relationships with carriers and worked collaboratively with them to establish a value proposition for the exchange that was as strong for the insurers as it was for employees and employers. In 2013, the Aon Active Exchange featured 9 national and regional carriers. In 2014, that number grew to more than 20.
- Leadership commitment –Aon piloted the exchange concept in 2012 with its 20,000 U.S. employees, and formally launched the model in 2013 with 3 large employers. Since it was launched, Aon has invested more than \$100M in its service model, platform, analytics and clients.

**At least one article, whitepaper, speech, or other published material or content available to the general public authored by the nominee. If possible, provide the full text, name of periodical or forum, and date of publication or presentation.**

Speeches/Panels (sample)

- Harvard Business School's Forum on Health Care Innovation panel - <http://projects.iq.harvard.edu/forum-on-healthcare-innovation/people/kenneth-l-sperling>
- International Society of Certified Human Resource Specialists' Annual Symposium – Early Insights From the First National Multicarrier Corporate Exchange, September 2013  
<http://www.iscebs.org/Symposium/Pages/ProgramDetails.aspx>
- Evanta HR's HR Leadership Forum – The Evolution of Employer-Sponsored Health Care, November 2013  
<http://link.brightcove.com/services/player/bcpid194036805001?bckey=AQ~~,AAAAA4SXjg~.5MYVwyfwn1rGvACrDcBhIOKOz21Q9P8H&bctid=2956199380001>
- MetLife National Benefits Symposium, March 2013
- National Health Insurance Exchange Summit, May 2013

Select Media Articles Where Ken Sperling has been quoted:

- Harvard Business School – 5 Imperatives: Addressing Health Care's Innovation Challenges (page 17)  
<http://www.hbs.edu/healthcare/pdf/Forum-on-Healthcare-Innovation-5-Imperatives.pdf>
- ABC News, Walgreens Moves Employees to Private Health Exchange  
<http://abcnews.go.com/Business/walgreens-shifts-160000-employees-subsidized-insurance-purchases/story?id=20294363>
- Associated Press, Walgreen Moves Health Coverage to Option that Provides More Choices, Responsibility for Worker <http://www.washingtonpost.com/business/walgreen-moves-health-coverage-to-option-that->

provides-more-choices-responsibility-for-worker/2013/09/18/5bfe9514-2051-11e3-9ad0-96244100e647\_story.html

- Benefits Quarterly -- Health Care Exchanges: The New Paradigm for Employer-Based Health Coverage <http://www.ifebp.org/inforequest/0161498.pdf>
- Bloomberg, Walgreen Joins in Exodus of Workers to Private Exchanges <http://www.bloomberg.com/news/2013-09-18/walgreen-joins-in-exodus-of-workers-to-private-exchanges.html>
- Business Insurance, Many Employees Opt for Lower-Cost Health Care Coverage through Exchanges <http://www.businessinsurance.com/article/20130318/NEWS03/130319843?tags=|74|278|307|329>
- Business Insurance, Private Health Insurance Exchanges Gain Traction with Employers [http://www.businessinsurance.com/article/20131006/NEWS03/1310069948?tags=%7c74%7c278%7c307%7c342#full\\_story](http://www.businessinsurance.com/article/20131006/NEWS03/1310069948?tags=%7c74%7c278%7c307%7c342#full_story)
- Business Insurance, Aon Hewitt Health Insurance Exchange Enrollment to Soar in 2014 [http://www.businessinsurance.com/article/20130918/NEWS03/130919820?tags=%7c62%7c63%7c307%7c329%7c74%7c278#full\\_story](http://www.businessinsurance.com/article/20130918/NEWS03/130919820?tags=%7c62%7c63%7c307%7c329%7c74%7c278#full_story)
- CFO, Aon Hewitt Scores 15 Big Private-Exchange Clients [http://www3.cfo.com/article/2013/9/health-benefits\\_aon-hewitt-walgreens-private-health-insurance-exchange-seard-darden-segal-eglizian-sondergeld-sperling-?pid=00000000-0000-0000-0000-000000000000&currpage=2](http://www3.cfo.com/article/2013/9/health-benefits_aon-hewitt-walgreens-private-health-insurance-exchange-seard-darden-segal-eglizian-sondergeld-sperling-?pid=00000000-0000-0000-0000-000000000000&currpage=2)
- CFO, With Private Exchanges, Workers Dump Old Health-care Choices <http://ww2.cfo.com/health-benefits/2013/03/with-private-exchanges-workers-dump-old-health-care-choices/>
- Christian Science Monitor, America's 'Other' Health-Care Revolution [http://www.csmonitor.com/USA/2013/1027/America-s-other-health-care-revolution/\(page\)/2](http://www.csmonitor.com/USA/2013/1027/America-s-other-health-care-revolution/(page)/2)
- CNBC – Exchanges 101; Ken Sperling <http://aonhewittcorporateexchange.com/thought-leadership/videos/>
- CNN Money, Walgreens Shifts Workers to Private Health Exchanges <http://money.cnn.com/2013/09/18/news/economy/walgreens-health/>
- Employee Benefit News, Aon Hewitt Adds Major Employers to Health Care Exchange <http://ebn.benefitnews.com/news/aon-hewitt-adds-major-employers-to-health-care-exchange-2736253-1.html>
- Forbes, Obamacare's Majestic Failure Is About Much More Than 'Glitches' <http://www.forbes.com/sites/brucejapsen/2013/09/22/obamacare-approach-to-online-exchange-benefits-drives-private-employers-to-same/>
- Forbes, The Smarter Healthcare Consumer Myth <http://www.forbes.com/sites/janetnovack/2013/03/18/the-smarter-healthcare-consumer-myth/>
- Forbes, Insurers Flock to Private Exchanges While States Grapple With Obamacare Marketplace <http://www.forbes.com/sites/brucejapsen/2013/04/15/insurers-flock-to-private-exchanges-while-states-grapple-with-obamacare-marketplace/>
- Forbes, Walgreen Joins The Rush To Employer Exchanges <http://www.forbes.com/sites/brucejapsen/2013/09/17/walgreen-joins-rush-to-employer-exchanges-an-alternative-to-obamacare-marketplace/>

- HR Magazine, On Private Health Exchanges, Choice Drives Satisfaction <http://www.shrm.org/hrdisciplines/benefits/articles/pages/private-health-exchanges.aspx>
- MarketWatch, Your Boss May Send You to a Health Exchange <http://www.marketwatch.com/story/your-boss-may-send-you-to-a-health-exchange-2013-10-30>
- New York Times, Private Exchanges Rise as Health Care Options [http://www.nytimes.com/2013/11/20/your-money/private-exchanges-rise-as-health-care-options.html?pagewanted=1&\\_r=1&](http://www.nytimes.com/2013/11/20/your-money/private-exchanges-rise-as-health-care-options.html?pagewanted=1&_r=1&)
- Reuters, Walgreen Shifting Employees to Private Healthcare Exchanges <http://www.reuters.com/article/2013/09/18/us-healthcare-exchanges-private-idUSBRE98H03120130918>
- Wall Street Journal, To Save, Workers Take On Health-Cost Risk <http://online.wsj.com/news/articles/SB10001424127887323639604578366420251188326?mod=vocus>
- Washington Post, Walgreens Moves Workers to Private Health-Care Exchange [http://www.washingtonpost.com/business/economy/walgreens-moves-workers-to-private-health-care-exchanges/2013/09/18/46f2c074-2082-11e3-8459-657e0c72fec8\\_story.html?wprss=rss\\_business](http://www.washingtonpost.com/business/economy/walgreens-moves-workers-to-private-health-care-exchanges/2013/09/18/46f2c074-2082-11e3-8459-657e0c72fec8_story.html?wprss=rss_business)

#### Blog Posts

- Exchanges Blog – Is a Private Health Exchange Right for your Organization?, February 2014 <http://aonhewittcorporateexchange.com/2014/02/is-a-private-exchange-right-for-your-organization-top-5-strategic-considerations/>
- Exchanges Blog – Employer Participation in Aon Hewitt’s Exchange Five Times Higher in 2014, September 2013 <http://aonhewittcorporateexchange.com/2013/09/employer-participation-in-aon-hewitts-corporate-health-exchange-five-times-higher-in-2014/>
- Exchanges Blog – Weighing the Options – Self-Insured versus Fully Insured, July 2013 <http://aonhewittcorporateexchange.com/2013/07/weighing-the-options-self-insured-vs-fully-insured-2/>

#### **How the nominee has contributed to advancing the practice of HR transformation and/or the HRO industry as a whole**

For Aon, Ken leveraged Aon’s existing relationships with insurers and employers, its administrative capabilities and market expertise to help create this new HR outsourcing business. Under his leadership, Aon’s pioneering capabilities in this area have accelerated a new market. Today, Aon’s innovative private health exchange is the nation’s only multi-carrier, fully insured private health exchange for large employers, with more than 600,000 employees and their families enrolled in health benefits through the Aon Active Health Exchange in 2014.

A recent report by Credit Suisse estimates that the projected enrollment in private health exchanges will jump from 1.1 million in 2013 to 40 million employees in 2018.

#### **One or more testimonials from a third party (e.g., external to the nominee's own organization) providing evidentiary confirmation of the nomination**

The creation and ongoing success of Aon Hewitt’s private health insurance exchange is directly attributable to Ken’s deep knowledge of the U.S. healthcare “system,” the various players in that system, and the flaws in the system that drive unnecessary costs and unsupportable cost increases in an era when U.S. companies face keen global competition. Ken’s knowledge and insight are uniquely coupled with his expertise in underwriting, plan design and plan management, reputation and relationships with senior leaders across health insurers, and understanding of the business side of the insurance industry, all of which were necessary to create the Exchange in a manner that was fair

to each insurer, workable from a systems perspective, and would work for many, many employers in the U.S. Having spent over 25 years in the benefits industry, I can honestly say that few people have both the knowledge and the abilities to do this, and none that I would trust more than Ken to have carefully considered all the details from multiple perspectives. With Ken's vision, integrity, and guidance, I am confident that his new model will continue to grow, reduce health care cost increases for companies and employees alike, and enable insurers and employers to move faster on multiple initiatives to better manage the health and health care costs of individuals participating in the Exchange." --Ted Nelson, Vice President of Benefits, The Americas, Hilton

"Ken's deep expertise combined with his passion and tenacity uniquely enabled the creation of the private exchange model. Through his partnership and counsel, Ken provided Darden the confidence to make a bold decision to join the exchange at a time when others were skeptical. He is a true innovator within the human resources field and we would not be where we are today without his leadership." --Danielle Kirgan, Darden

"As a visionary in the health and employee benefits industry, Ken Sperling has played a pivotal role in shaping the employment-based health benefits marketplace. As one of the leading architects of private health insurance exchanges, Ken brings innovation to the industry. He has had a profound effect on the health care system in the United States." --Paul Fronstin, Director, Health Research & Education Program, Employee Benefit Research Institute

**Be sure to provide details around the nominee's impact and the resulting outcomes, using specific numbers and metrics (where possible)**

- Helped shape a new market in the HR Outsourcing industry. Ken was the lead architect behind the Aon Active Health Exchange, the industry's first multi carrier private health exchange for large employers featuring fully insured plans. Since launching the Aon Active Health Exchange in 2012, the market has grown rapidly, with multiple organizations launching exchange-type models. According to Accenture, more than 40 million Americans will purchase health insurance through private exchanges by 2018, up from 1 million in 2014.
- Positioned Aon Hewitt as the leader in private health exchanges. Under Ken's leadership, Aon significantly grew employer and carrier participation in the Aon Active Health Exchange over two years.
- In 2013, the number of large employers participating in the Aon Active Health Exchange, including Sears, Darden and Walgreens, was five times the number that participated in 2013. Enrollment tripled, with more than 600,000 U.S. employees and their families covered under plans in the Aon Active Health Exchange in 2014.
- In 2013, the Aon Active Exchange featured 9 national and regional carriers. In 2014, that number grew to more than 20 carriers and is expected to increase again in 2015.