

joshbersin



Untangling The HR Tech Market 2021

Global Industry Analyst
2021 Edition
Twitter @Josh_Bersin

HR Technology Evolved: For The World of COVID-19

A dense, chaotic pile of multi-colored wires and cables, representing complexity and entanglement. The wires are in various colors including red, blue, yellow, green, black, and white, and are tangled together in a complex, overlapping manner. Some wires have connectors or labels attached to them. The overall appearance is one of a messy, unorganized mass of electronic components.

Untangling The HR Technology Market

How The World Has Changed



Four Phases of The Pandemic

React

- HR, IT, Facilities come together
- Response task force assigned
- Set up emergency team around the world
- Daily standup meetings
- Regular all-hands and CEO communications
- Essential vs. Non-Essential workers
- Real-time data on infection and travel
- Real-time feedback and surveys
- Reporting of problems, infections, issues
- Remote work policy
- Stipend for home office equipment
- Support India and remote offices
- Empower HRBP to act and coordinate
- Cut or realign budgets
- Share business downturn and changes
- CEO Chief Empathy Officer
- Support leaders to help remote workers
- Provide support to furloughed people
- Return and remind of values and mission
- Show positive future and optimism
- Put big projects aside

Respond

- Remote work training and tools
- 1:1s, communications, team connection
- Programs for mental health and resiliency
- Increase access to counseling
- Cost offset for childcare
- Wellness, safety tips, education on virus
- Exercise, fun, kids programs
- Online learning on every topic
- Home school help and programs
- Daily communications on status and policies
- Coaching and counseling on stress
- Furlough or job policies
- Mandatory leave, vacation policy updates
- Update to performance process
- New workforce plan, new hiring plans
- Swap workers, support dislocated people
- Change bonus accruals, exec pay
- Regular pulse surveys and feedback
- Remote interview, onboarding
- Train managers on new role and issues
- Apply for government support in location

Return

- Move and change roles, train for new roles
- Create new protocols for safety and health
- Define who “comes back” and who doesn’t
- Create distancing guidelines in office
- Buy masks and other safety equipment
- Stay current on local regulations and changes
- Identify “fear of return” and address issue
- Formalize infection reporting process
- Decide new process for pay and performance
- Reset expectations around productivity
- Create new flexible work policy
- Decide what locations to close
- Put people into working teams
- Create program around stress and PTSD
- Invest in pay and benefits for economics
- Align with ongoing government policies
- Support local community programs
- Train employees on productivity at home
- Roll out new wellbeing program
- Roll out new leadership support program

Transform

- Reinvent business model
- Rethink customer experience and demand
- Move and change roles, train for new roles
- Redefine customer engagement model
- Create new business plans and goals
- Redefine org structure for new world
- Set in place ongoing measurements
- Identify new HR tech platforms
- Realign careers and jobs for new business
- Invest in citizenship and diversity
- Deal with Black injustice issues
- Redefine brand and marketing message
- Create scenario for new wave of virus
- Partner with infection, safety vendors
- Rethink hiring plan
- Strengthen internal mobility programs
- Roll out new work at home strategy
- Roll out new facilities strategy
- Roll out new customer interaction strategy
- Give leadership a rest and new energy
- Redefine company mission
- Realign financial goals

The Big Reset in HR: New Operating Model

Responsive (Efficient)	Resilient (Adaptive)
<i>Operating Model: central control, distributed execution</i>	<i>Operating Model: distributed control, centralized coordination</i>
<ul style="list-style-type: none">• Integrated HR tech strategy• Strength in People Analytics• Self-directed learning, new career models• Integrated experience for recruitment• Strong focus on business priorities	<ul style="list-style-type: none">• HR professionals work close to client needs• Teams are cross-functional by design• Agile “pools” of people who work on projects• HR professionals know each other well• Skills and capabilities valued and well known
<i>Strategic, data-driven, experience-oriented, diverse, inclusive, passionate.</i>	<i>Cross-trained, highly collaborative, distributed, coordinated, agile.</i>
Success: efficiency and employee satisfaction	Success: speed and quality of response

The Shift In HR Technology

Pre-Pandemic

- Best features and functionality
- Vendor stability and growth
- Ease of use, ease of implementation
- Scalability and fit with organization
- Customer support and vendor trust

The Right Product

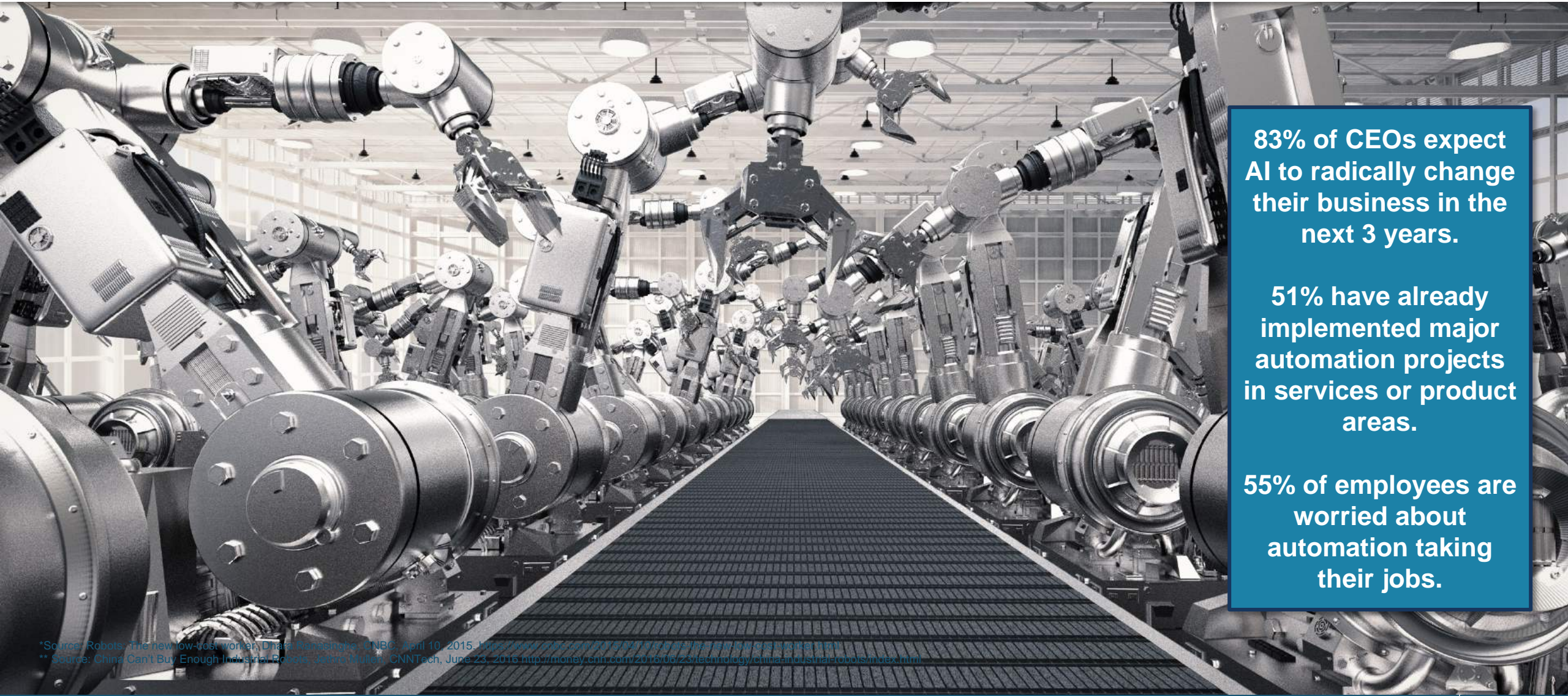
Now - Adaptable

- System fit and **flexibility**
- Vendor size and **reliability**
- Ease of use, **flow of work integration**
- Scalability, **configurability**, fit
- Customer support and vendor trust

The Right Platform

The Future of Work is Here

AI, Robotics, Sensors Have Arrived



83% of CEOs expect AI to radically change their business in the next 3 years.

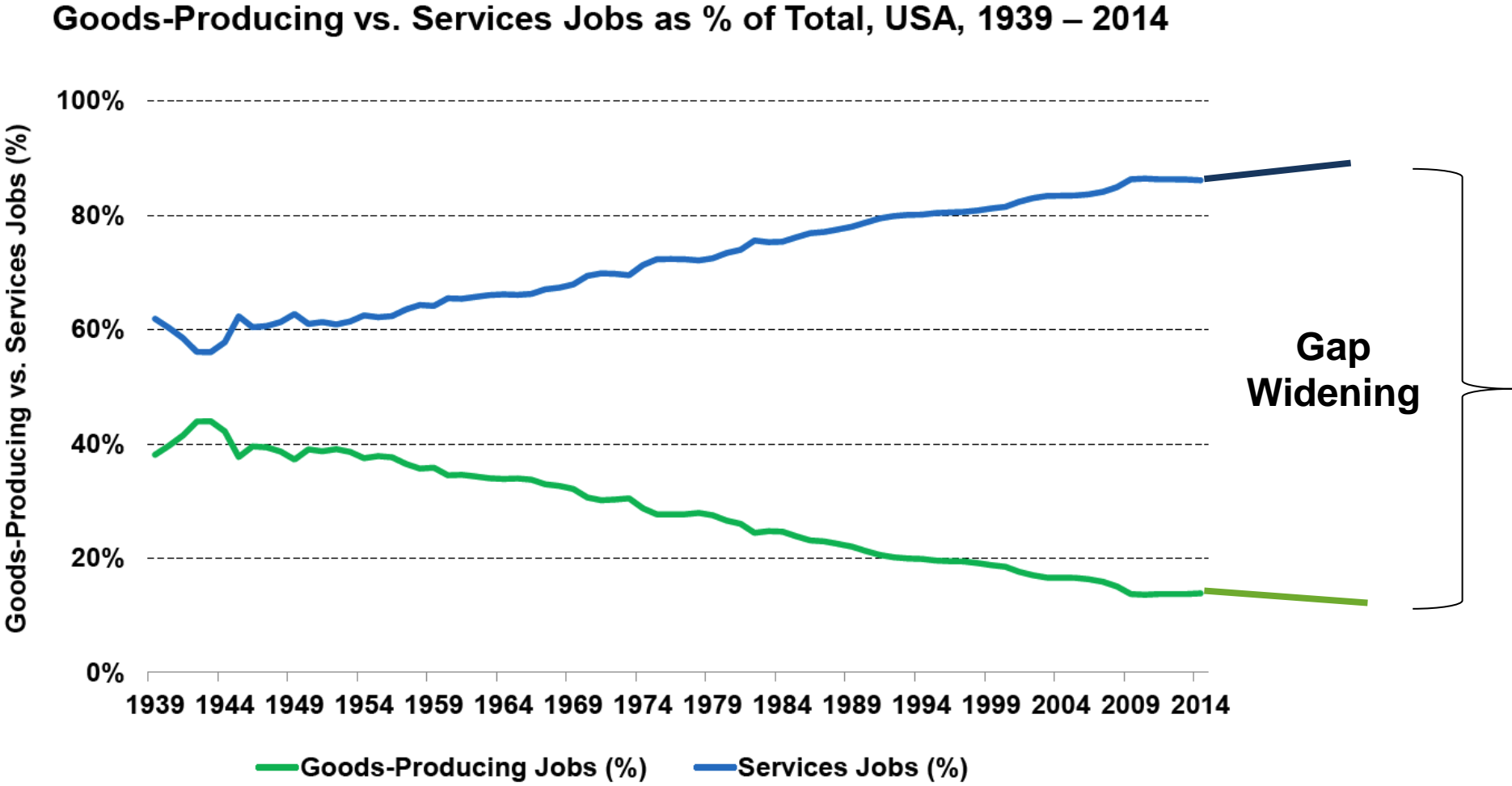
51% have already implemented major automation projects in services or product areas.

55% of employees are worried about automation taking their jobs.

*Source: Robots: The new low-cost worker, Dhara Banerjee, CNBC, April 10, 2015, <https://www.cnbc.com/2015/04/10/robots-are-new-low-cost-worker.html>

** Source: China Can't Buy Enough Industrial Robots, Jason Muller, CNNTech, June 23, 2016, <http://money.cnn.com/2016/06/23/technology/china-industrial-robots/index.html>

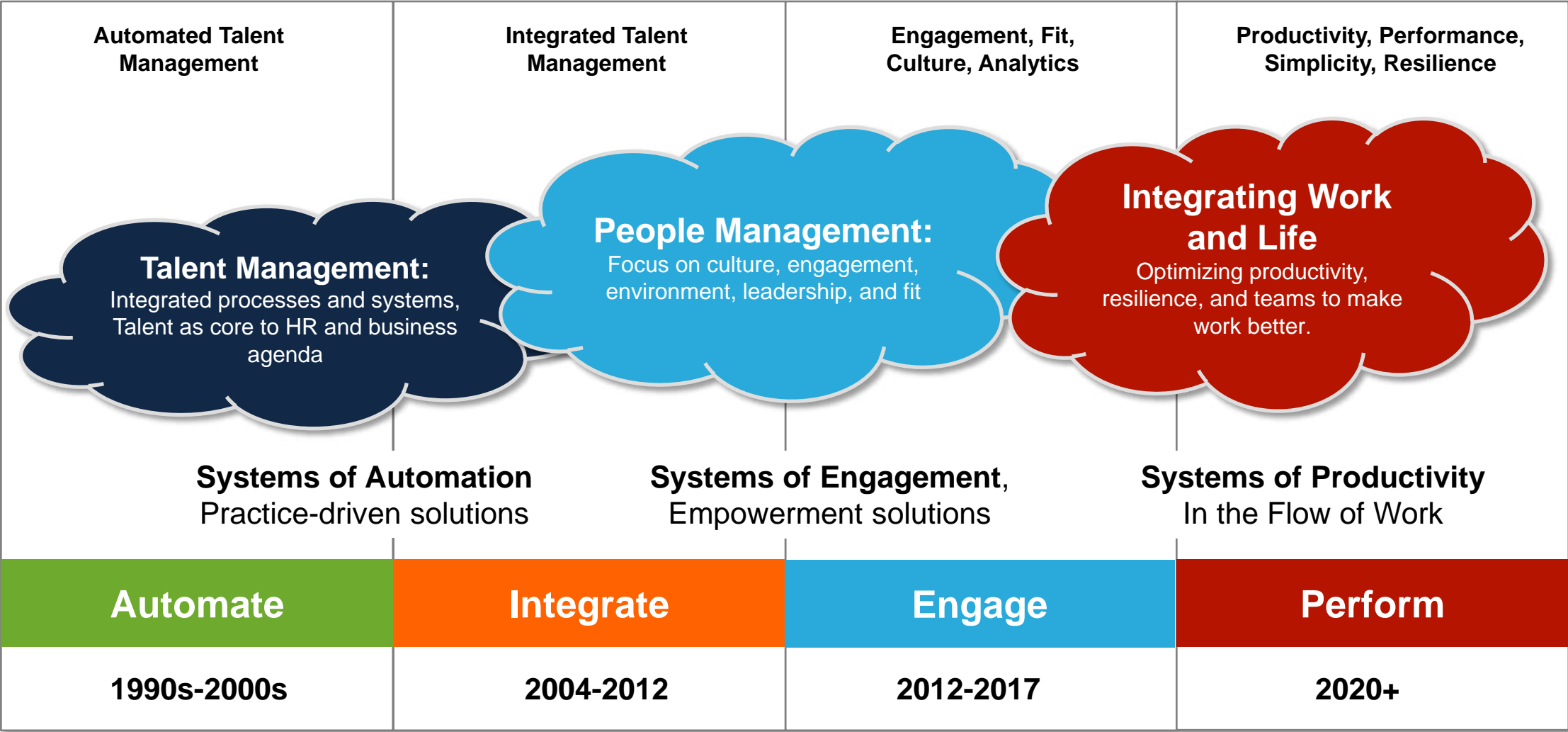
Shift to Service and IP-based Economy



Source: U.S. Bureau of Labor Statistics

“Fully Grown” by Dietrich Vollrath

The New HR Tech: *Integrating Work and Life*



The Big Shift: *Integrating Work and Life*

HR Tech

HRMS	Goals	Engagement
Payroll	Recognition	Surveys
Recruiting	Learning	Feedback
Compliance	Opportunities	Development
Benefits	Pay	Career

Work Tech

Wellbeing	Email	Goals
Family	Video	Recognition
Career	Chat	Learning
Lifestyle	Documents	Opportunities
Health	Processes	Pay

Finance | Family | Photos | Events | Fitness
Neighbors | House | Feelings | Transitions

The Transition From HR Tech to Work Tech



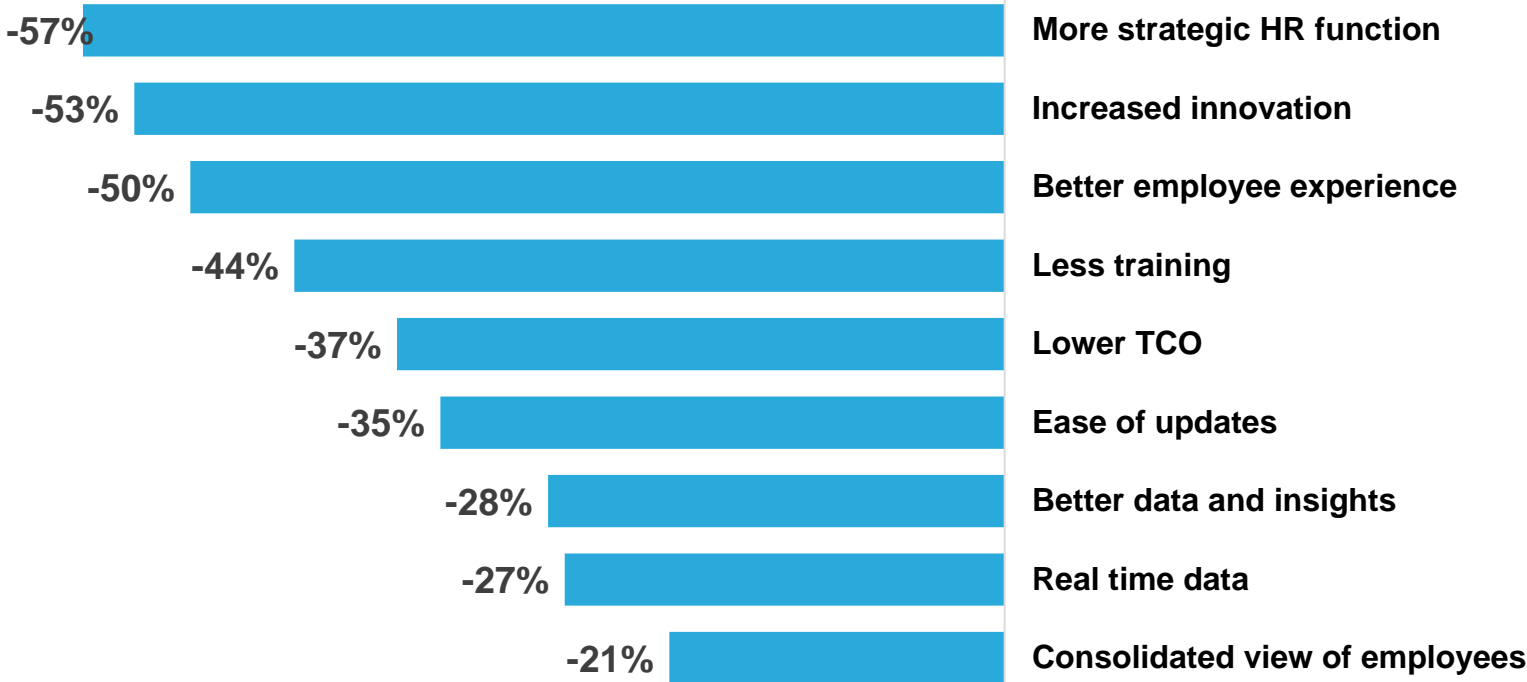
Success Is Harder To Achieve Than We Thought

32% of HR Tech Projects are significantly over budget

53% of projects miss deadline for implementation

42% rated not fully successful or failed after two years

Dashed Expectations From Cloud HCM



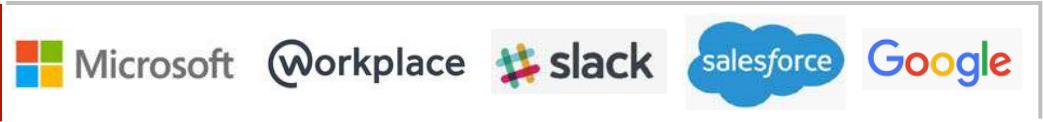
Difference between expected value and actual value achieved.

Source: 2019 Deloitte Human Capital Trends and 8/2019 proprietary research by Bersin, n=801

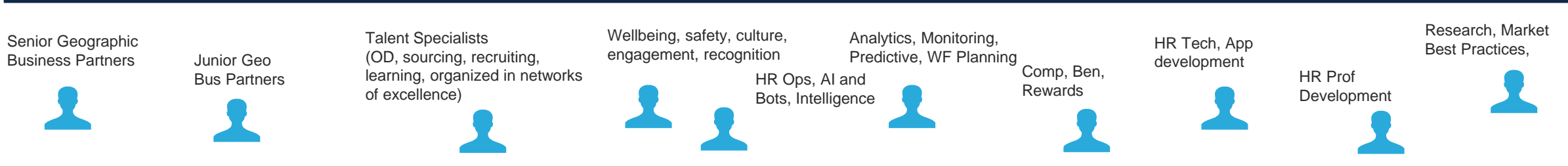
HR Technology Architecture: 2021 and Beyond



Work Tech: Systems of Productivity



Employee Workflows: Chat | Survey | Communicate | Route Cases | Resolve



1

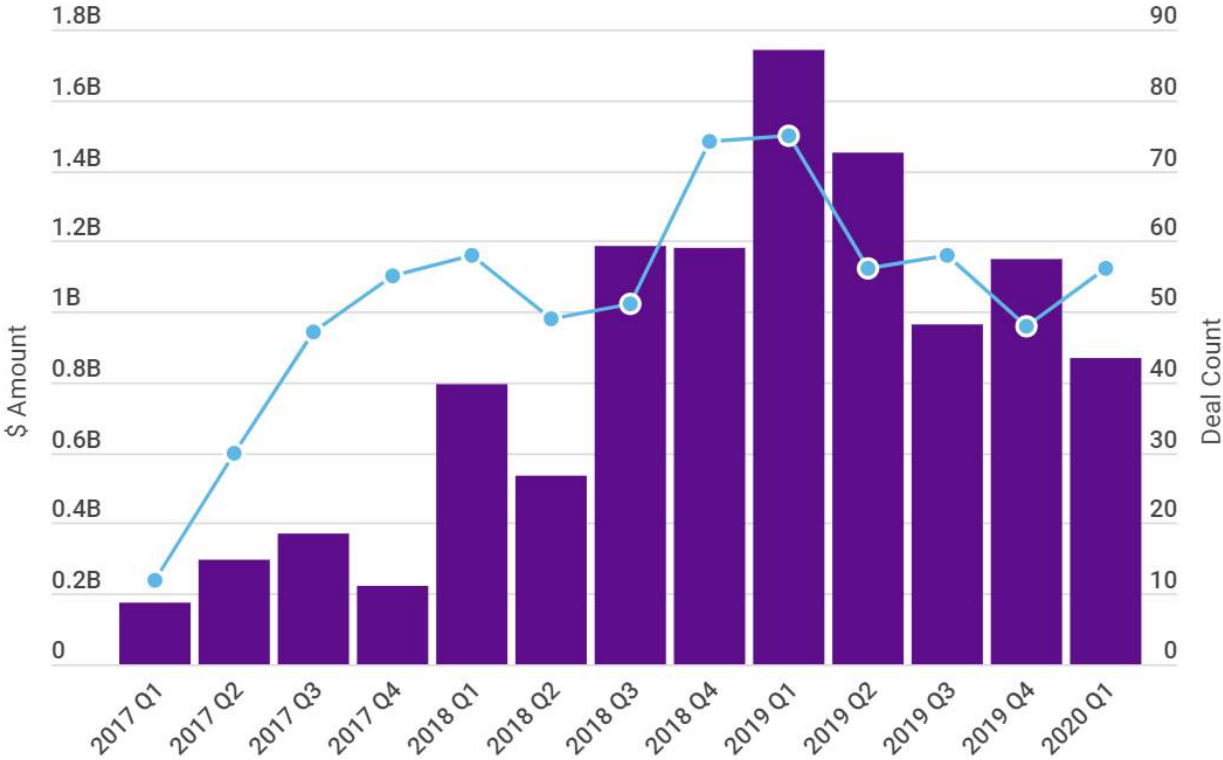
Core HCM Systems Now Stretched Thin

Disruption | Growth | Expansion



Continued Massive Investment in HR Tech

\$16.0 Billion in Investment in HR Tech Since 2009 (3,218 companies)



2019: \$4.8 b invested

2020: Over \$1b year to date

- Lyra (\$75M)
- Maven (\$45M)
- Headspace (\$93M)
- Healthjoy (\$30M)
- ModernHealth (\$31M)

Wellbeing

- Personio (\$75M)
- Justworks (\$50M)

Payroll

- Catalant (\$35M)
- InterviewBit (\$20M)
- Phenom (\$30M)
- Mya (\$30M)

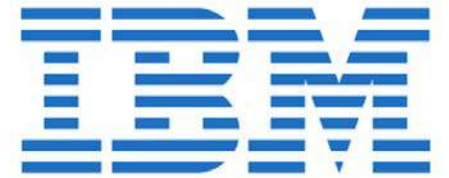
Recruiting

- Udemy (\$50M)
- WorkBoard (\$30M)
- Strivr (\$30M)

Learning, PM, VR

Source: #HRWins

Every Major Company Is Now Building HR Technology



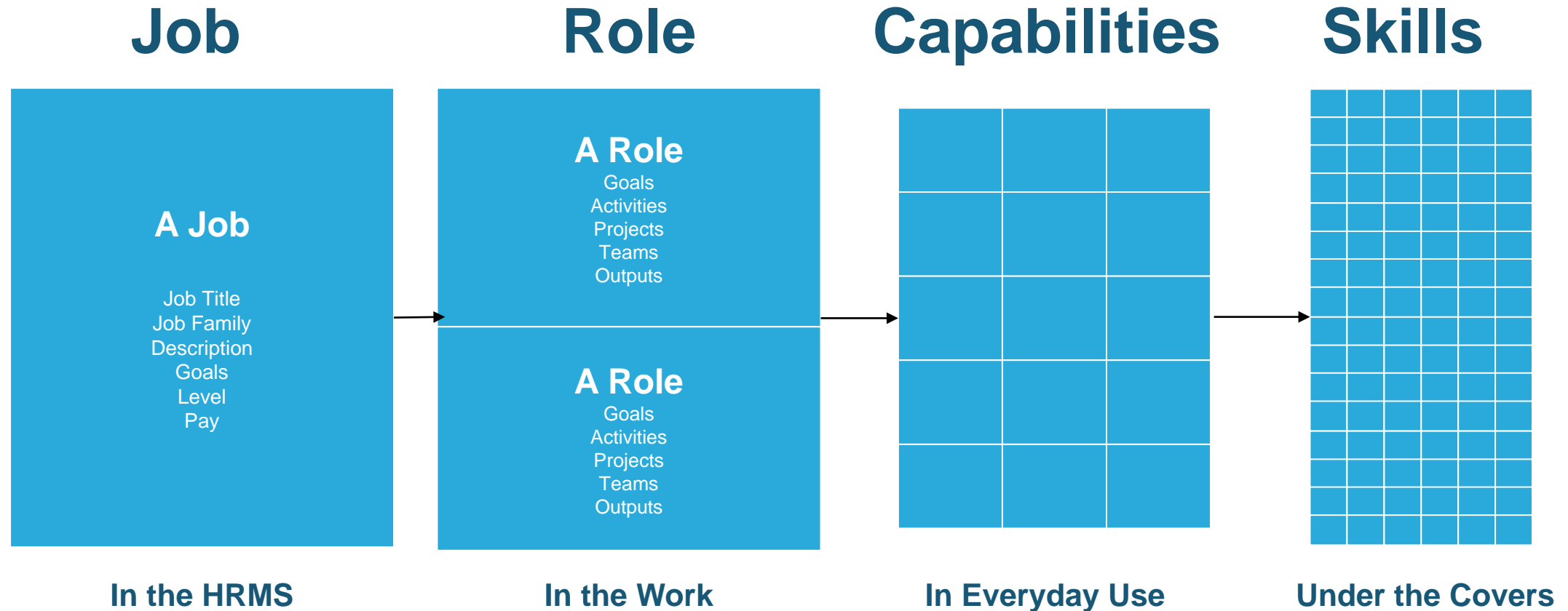
HCM Vendors Trying To Keep Up

...Becoming Spread Thinner and Thinner

- Global payroll
- COVID-19 response and reporting
- GDPR compliance
- Reinventing performance management
- New learning platforms
- Feedback and pulse surveys
- AI-based recruitment
- Wellness, fitness apps
- Diversity and inclusion products
- Team management tools
- Career management
- Employee experience
- Integration with Slack, Workplace, G-Suite



Understanding Jobs, Roles, Skills, and Capabilities



New Platforms

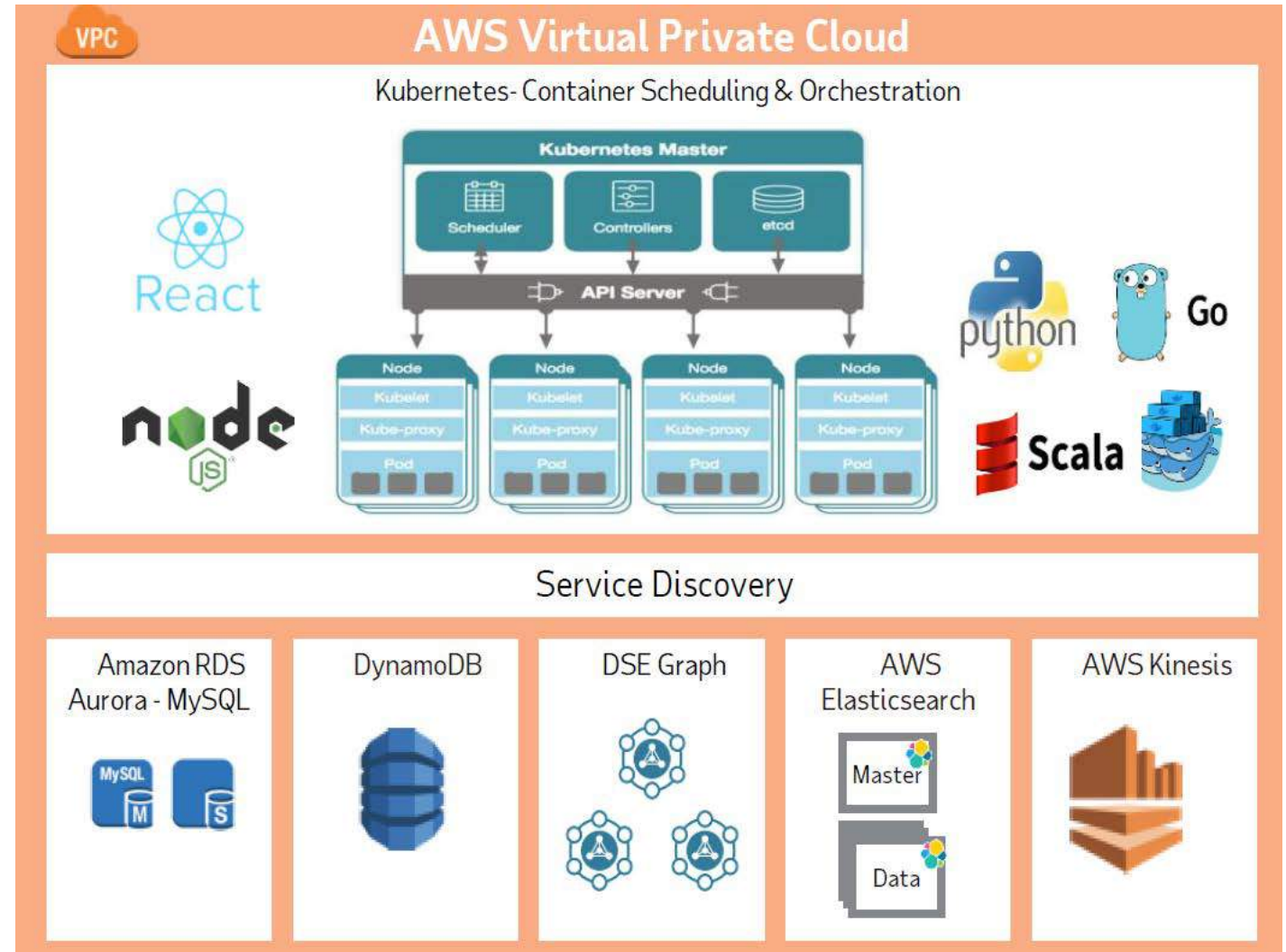


Why ADP's Next-Gen HCM Is A Disruptive Force In HR Technology

BY JOSH BERSIN · PUBLISHED SEPTEMBER 18, 2019 · UPDATED SEPTEMBER 24, 2019

A year ago I wrote a controversial article about ADP's new core HCM system, code-named Lifion. Well here it is a year later, and it looks like ADP has done it. The company's next-generation HCM and payroll system is now available, and could become one of the more disruptive systems on the market. While the system is still young, it sets a technical direction for Workday, SAP, Oracle, and others.

How The HR Software Market Has Changed





The image displays the SAP SuccessFactors user interface on both a laptop and a smartphone. The laptop screen shows the 'Activities for William Carver' dashboard. On the left, a sidebar lists direct reports: Wilma Sown (Sales Director, NW), John Groce (Sales Manager), Henry Fitch (Sales Manager), William Carver (Sales Manager), Peter Schall (Sales Manager), and Betty Lau (Sales Manager). The main area is titled 'Activities for William Carver' and includes a '+ Create Activity' button and view options for 'View By Status' and 'View By Goal'. The activities are organized into three columns based on status: 'Here's What I'm Working On (5)', 'Could Use Some Help (2)', and 'Yippie! I'm Done (2)'. Each activity card includes a title, a description, and an update timestamp. The smartphone displays a mobile view of the interface, showing a 'Meeting with Wilma Sown' activity on Dec 9, 2019. It features a summary of updates prior to the first meeting, with counts for 'New Activities' (9), 'Achievements' (2), and 'Completed' (2). The mobile view also includes a 'View by Status' dropdown and a list of activities with a '+ Add' button at the bottom.



Good Morning, Claire
It's Monday, October 14th

SUGGESTED TASKS

[View Org Chart](#) [Request Time Off](#) [Create Expense Report](#)

Expenses Time Off Learning 401k Savings [View All](#)

John Henry's Birthday is October 21st
Send a message to help celebrate
[Send an Email](#)

Welcome to the Team
Let's get going on your onboarding experience [Go To Onboarding](#)

JOURNEY

First Time Manager

INTRODUCTION TO BEING A MANAGER Completed:

- Welcome to Your Journey ***
Article
- Get to Know Your Team ***
Task

TIPS FOR NEW MANAGERS Completed:

- Your First Month**
Video -- 5 minutes
- How to Setup Manager Goals**
External Link

Oracle HCM

INSPIRE Search... [Home] [Notifications] [Profile]

Gretchen Adams
Share that great idea with your team...

51 Conversations | 3 Following | 6 Followers

- 5 Employee News
- 2 Purchase Requisitions
- 17 My Goals
- 3 My Flags
- 8 Expense Reports
- 9 Performance Documents

Team | About Me | Talent | Work Life | Analytics and Planning | Directory

My Safety

Proactive Methods for Positive Outcomes

Inspire is committed to having a world-class program for managing environmental health and safety (EHS)

4 Incidents | Own 2 Overdue

0 Events | Own

3 Actions | Own 1 Overdue

0 Activities To Approve

0 Activities To Review

0 Activities To Preapprove

[Report Incident](#)

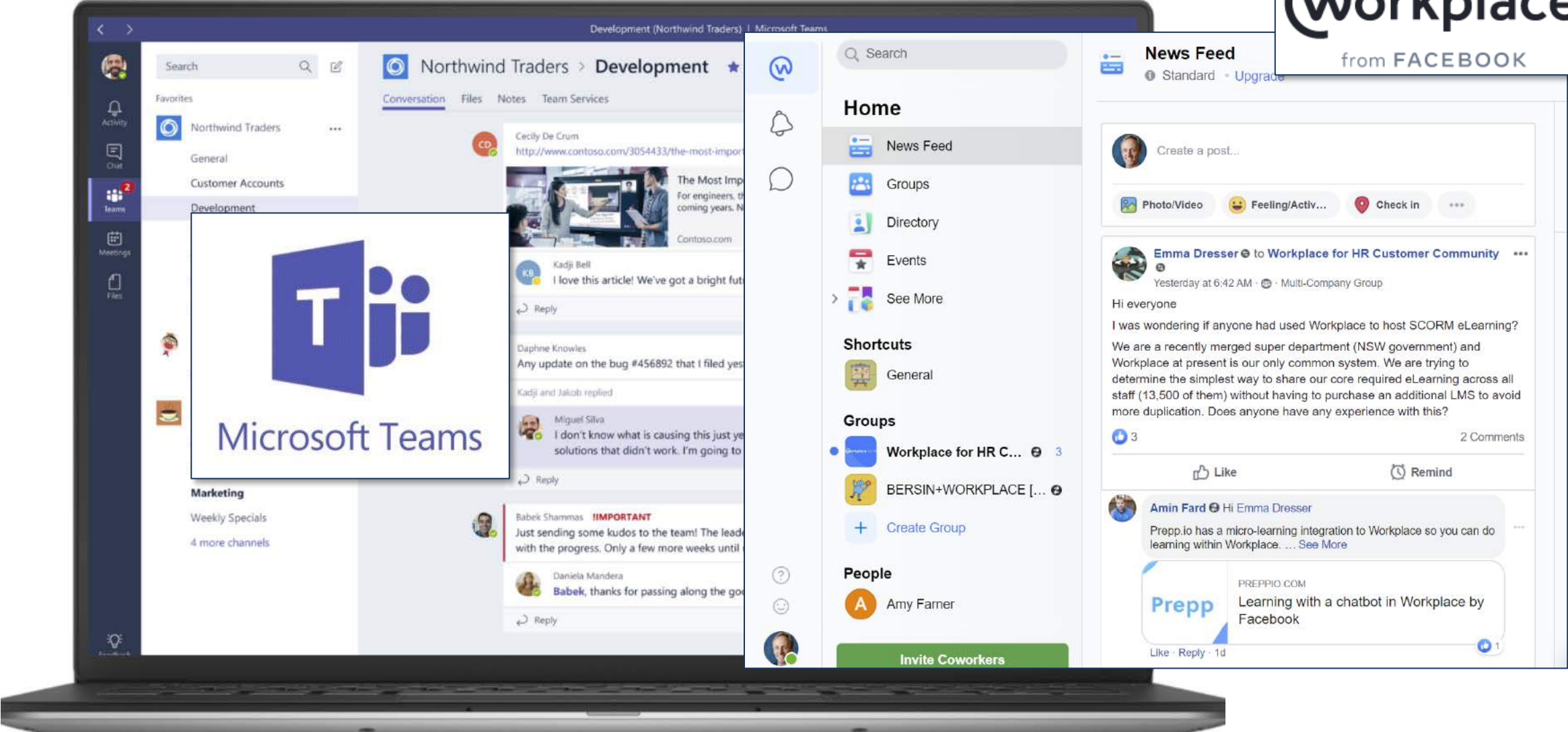


HR Help Desk

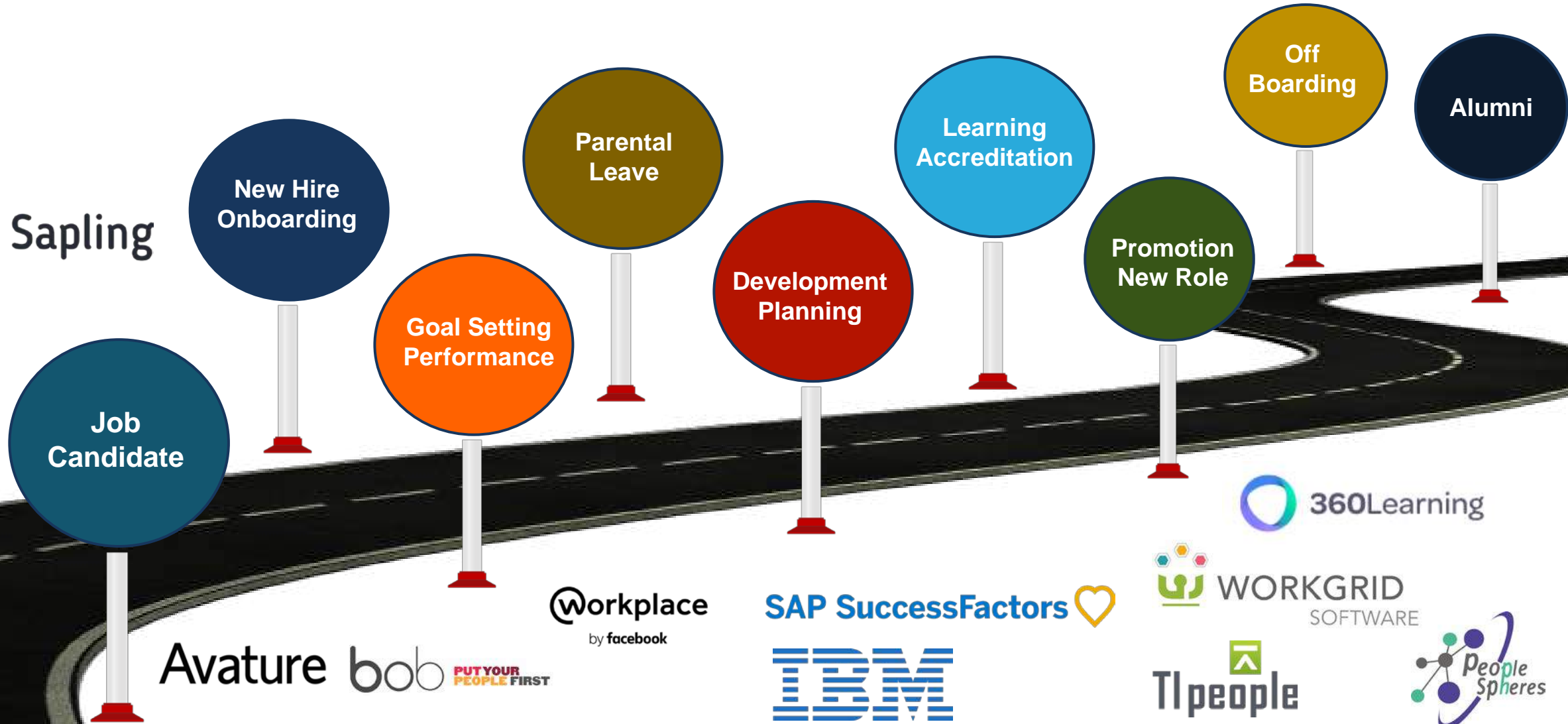
Find Reference Number [Search] List My Open Service Requests [Filter] [Actions] [Create Service Request]

Critical	Reference Number	Title	Channel	Last Updated Date	Account	Severity	Status
	SR000026004	How Do I sign up for Direct Deposit		4/10/2017 3:30 PM		High	New
!	SR000026006	Requesting an employment verification letter		4/10/2017 7:45 AM		High	New
!	SR000026005	Problem in updating my contingent worker's assignment		4/10/2017 5:05 AM		Medium	New
	SR000021068	What is the LOA policy	Web	4/8/2017 5:30 PM		Medium	New
	SR000021060	Appraisal Process	Web	4/3/2017 4:30 PM		Medium	New
	SR000021055	I need to know about extending my leave		4/3/2017 9:30 AM		Medium	New
	SR000021037	I missed the open enrollment deadline. Can I still elect benefits?	Web	4/1/2017 2:30 PM		Medium	Open
	SR000021021	What is my vacation balance?		3/28/2017 1:30 PM		High	Open
	SR000021018	Question about Leave of Absence		3/27/2017 2:30 PM		Medium	Open
	SR000021009	HSA Information		3/27/2017 12:46 PM		Medium	Open
	SR000020978	Where do I download my W2?	Web	3/25/2017 1:20 PM		High	Open
	SR000020965	Can I set up different direct deposit accounts?		3/23/2017 3:05 PM		Medium	Open
	SR000020923	I just got married. Can I make changes to my benefits?		2/21/2017 6:30 PM		Medium	Open

Microsoft, Facebook, Google



The Workflow Workhorse

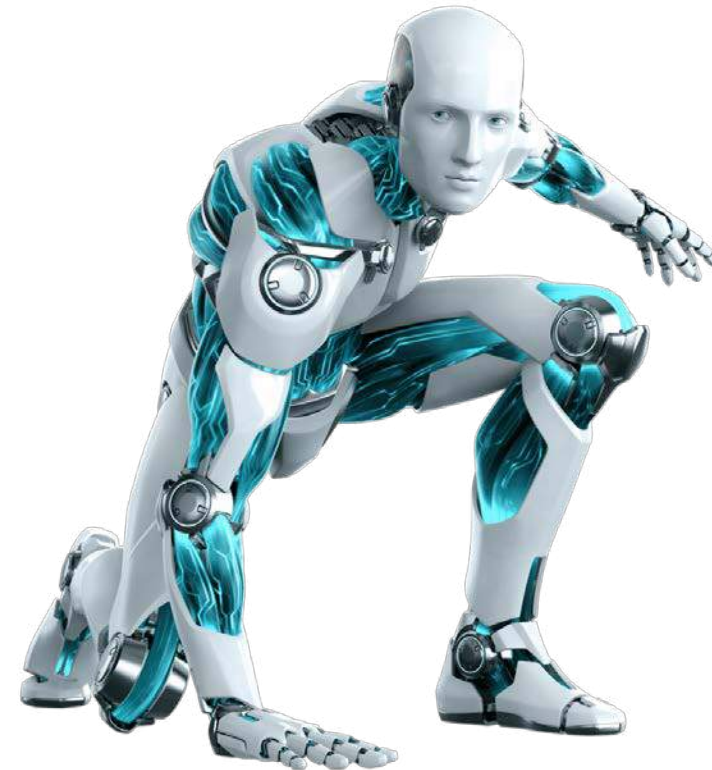


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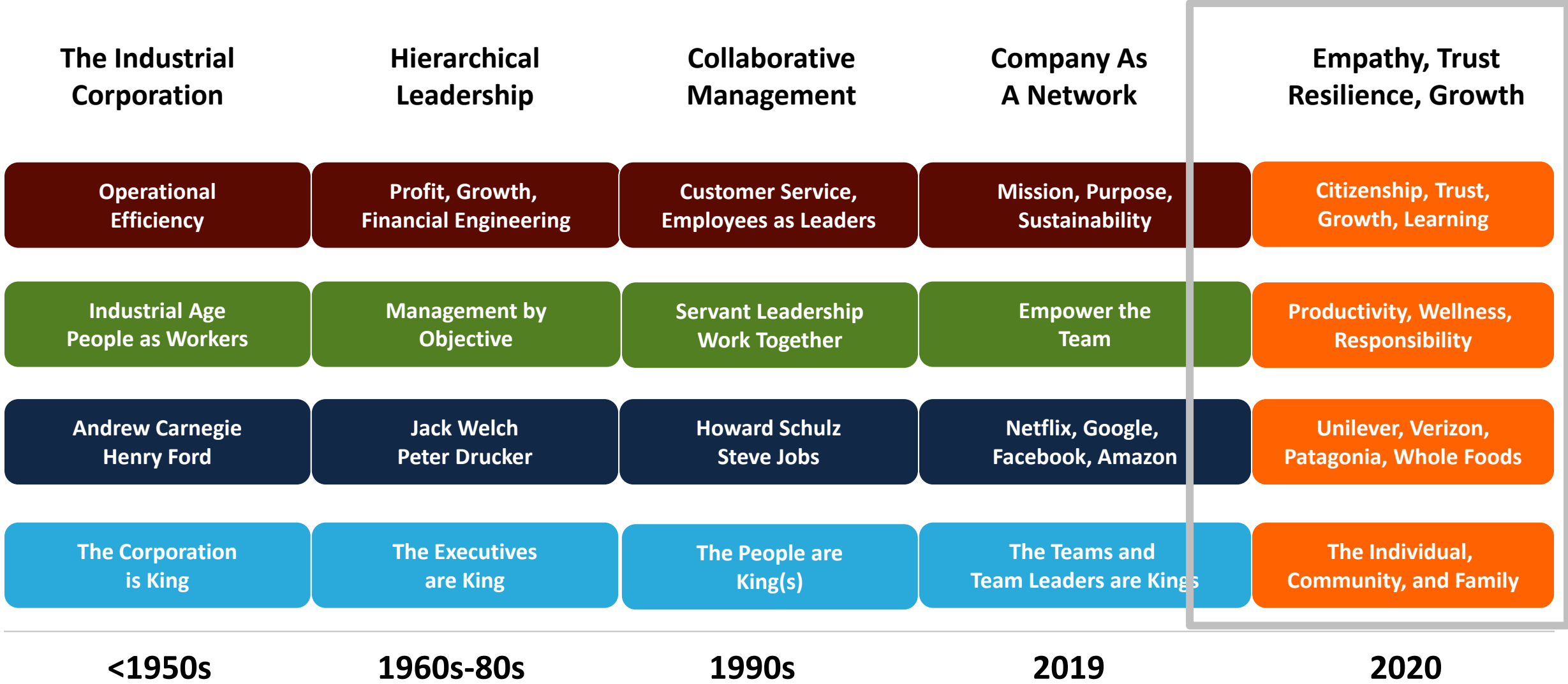
Talent Management Evolved:

A Brutally Competitive Market

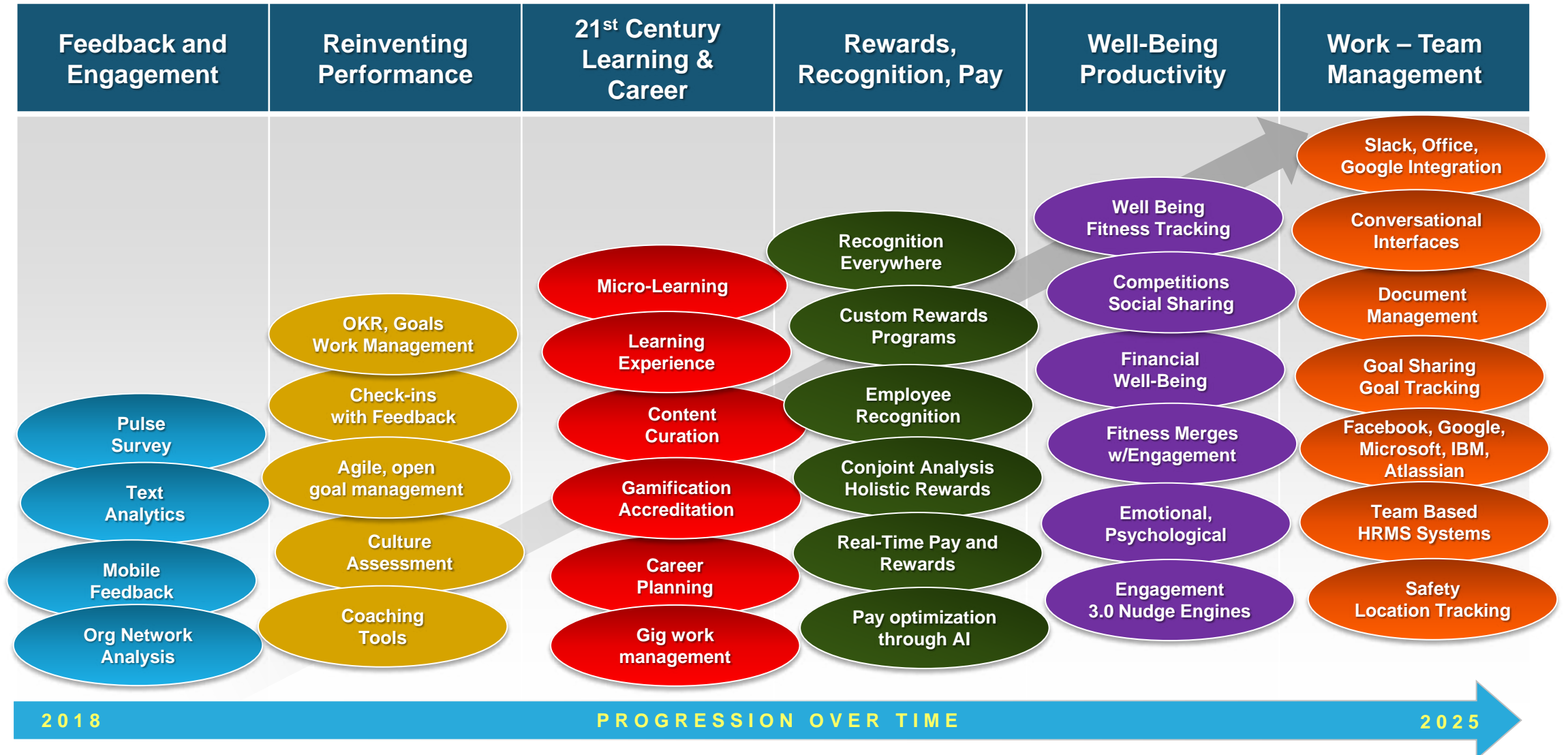
Employee Focused, HR Administered



Management Philosophy Has Changed



2021 And Beyond: A New Set Of Talent Apps



Talent Management Is Brutally Competitive



Learning

degreed
 edcast
 BRIDGE
 fuse universal
 career pathing software
 BetterUp

Recruitment

iCIMS
 Avature
 Jobvite
 HiredScore
 The Recruiter's Assistant
 pymetrics
 yello
 greenhouse
 talview
 Intelligent Hiring
 SmartRecruiters
 LEVER
 HireVue

Performance Management

Si Small Improvements
 BetterWorks
 Reflektive
 HighGround
 Lattice
 impraise
 Culture Amp

Rewards Recognition

kudos*
 YouEarnedIt
 globoforce*
 work human*
 FOND
 YouEarnedIt
 O.C.TANNER

Engagement

GLINT
 XANDER
 by ULTIMATE SOFTWARE
 Medallia
 GOOD & CO
 TINYpulse
 TrustSphere
 Culture Amp
 Perceptyx

Well Being

fitbit
 HEALTH SOLUTIONS
 CERIDIAN
 Makes Work Life Better™
 Virginia Pulse
 whil.
 limeade

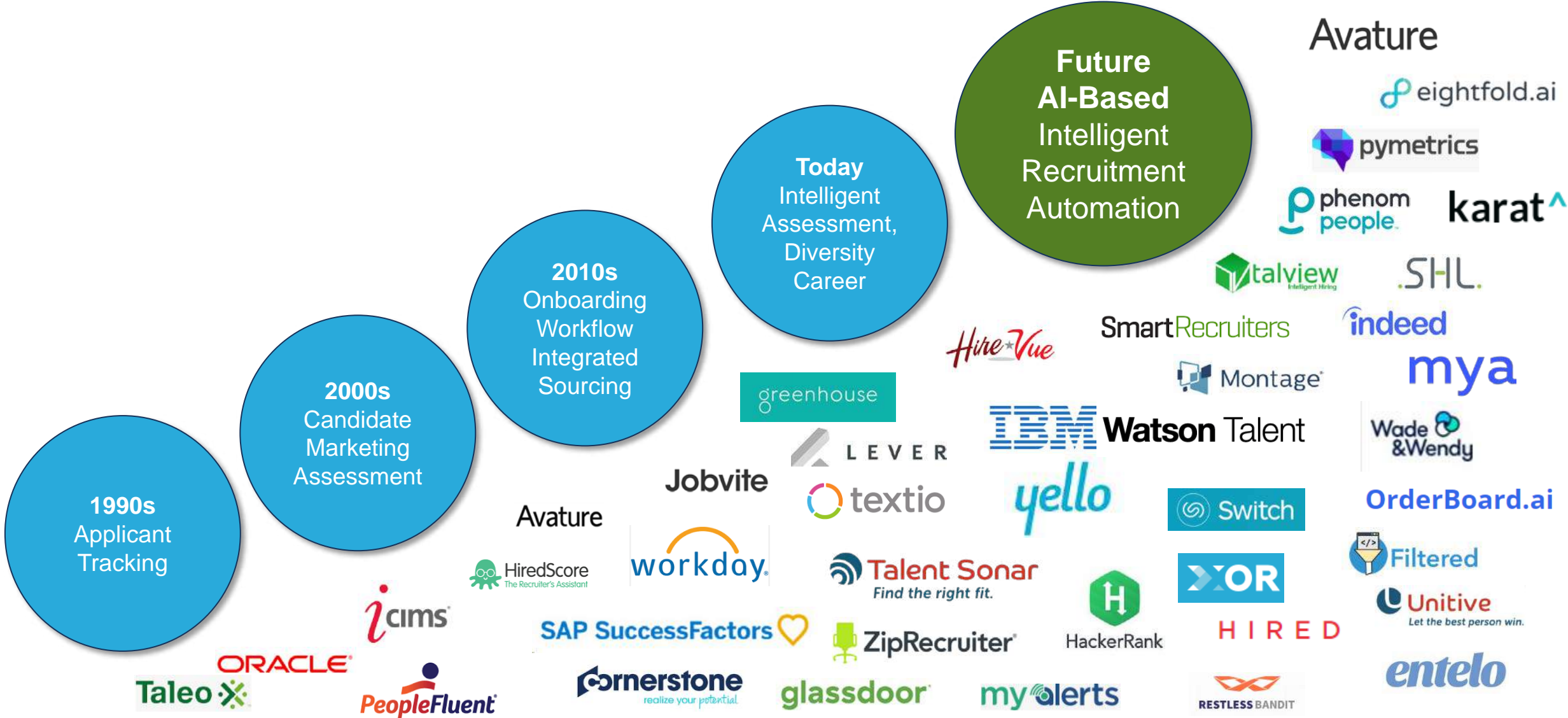
Payroll - Talent

ADP
 PAYCHEX
 paycom
 CERIDIAN
 Makes Work Life Better™
 KRONOS
 Ultimate
 SOFTWARE
 People first
 Paycor

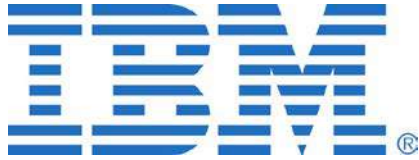
Mid-Market

bob
 bambooHR™
 PeopleStrong
 Namely
 GUSTO
 FORMERLY ZENPAYROLL
 ZOHOO
 OrangeHRM
 NEW LEVEL OF HR
 sage
 zenefits

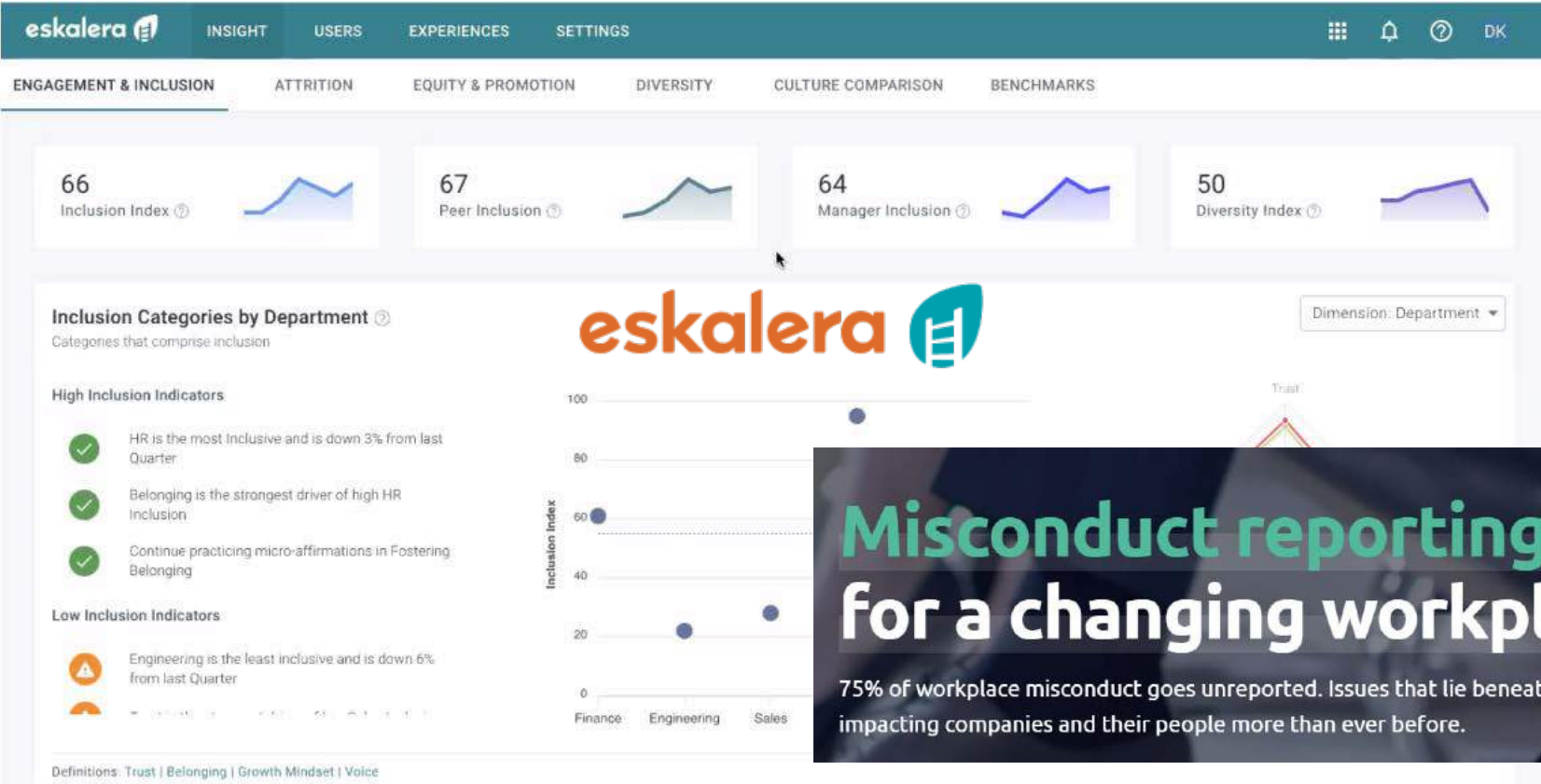
Continued Growth in Talent Acquisition



AI Is Now A Standard Feature



New Tools To Drive Fairness, Diversity, Inclusion



Misconduct reporting for a changing workplace

75% of workplace misconduct goes unreported. Issues that lie beneath the surface are impacting companies and their people more than ever before.



3

Employee Voice Platforms From Insights to Action

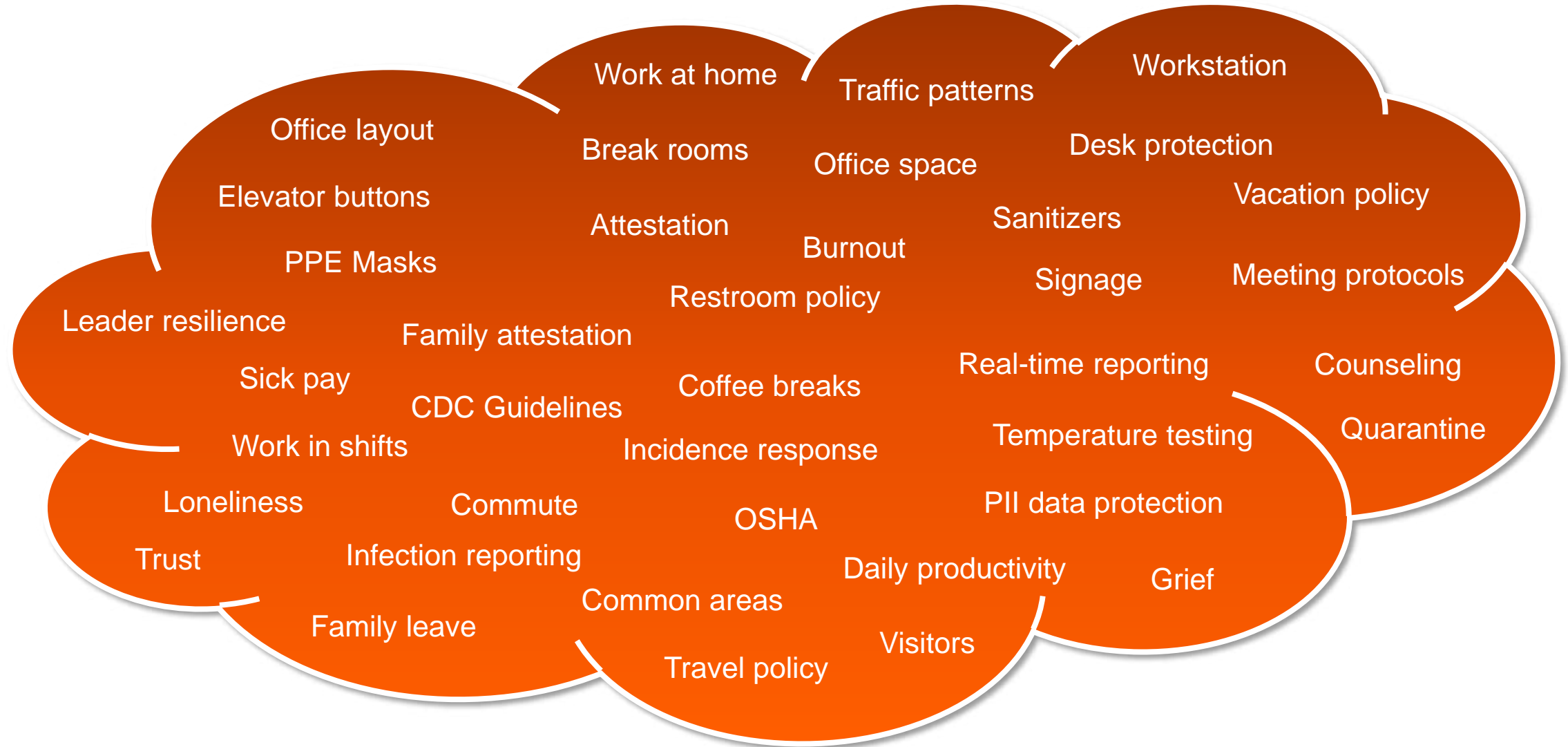
Survey | Voice | Action



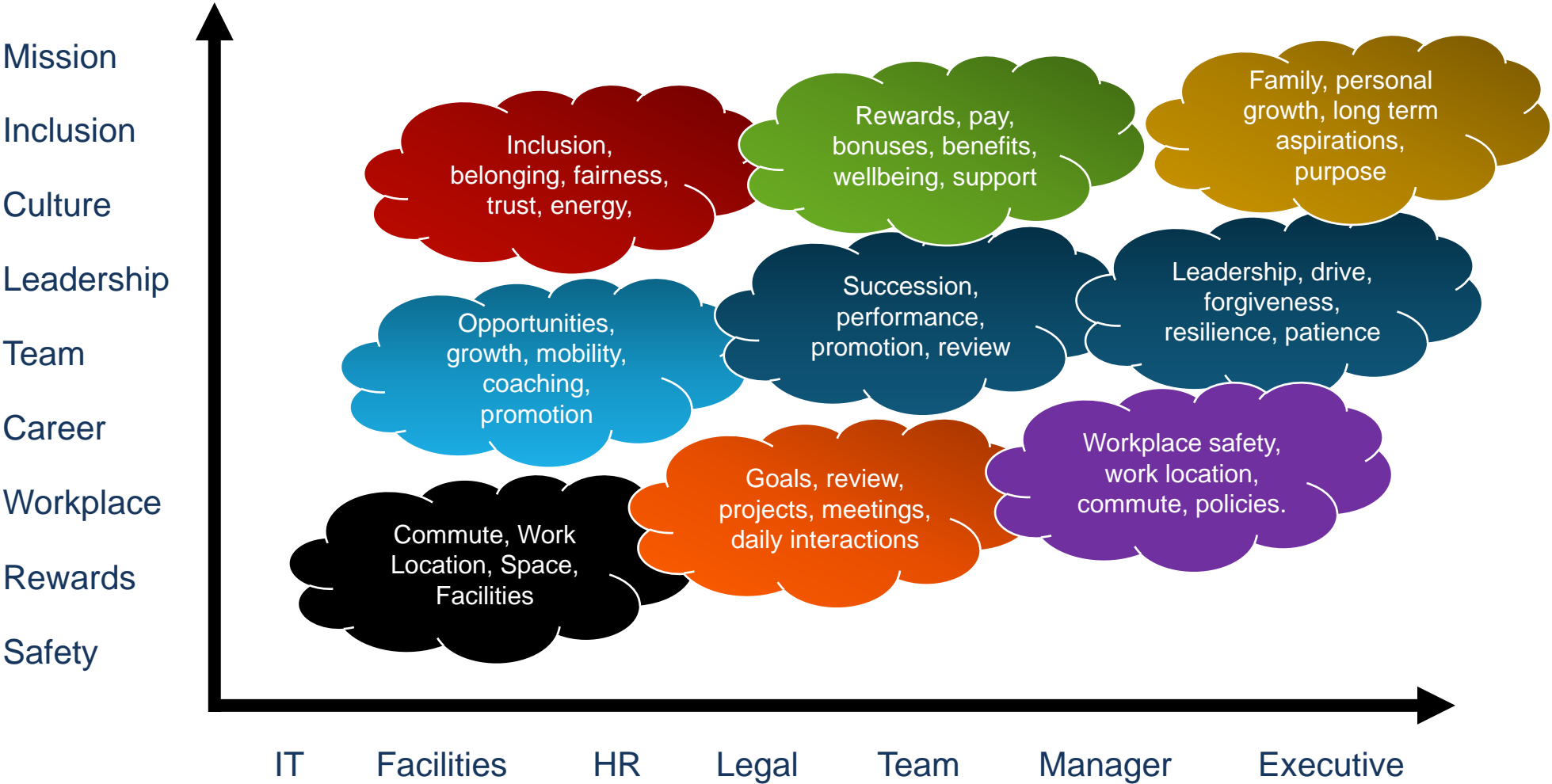
Employee Experience – Before Coronavirus



Employee Experience – After Coronavirus



Wide Range of Employee Experience Issues



Employee Engagement Market (EX) Evolves

EX 1.0	EX 2.0	EX 3.0	EX 4.0
Annual engagement survey	Pulse surveys with mobile access	Intelligent dashboards and action plans	Continuous Response <i>action platforms</i>
Once per year. Focus on management. Benchmarked annually. Rigid questions asked year after year.	Agile surveys as needed. Pulse on regular basis. Feedback on mobile or apps. AI-based action plans. Immediate feedback.	Many sources of data. Dashboards recommend action, deliver nudges, suggestions, and learning or action plans for individuals	Tied into internal systems with alerts, feedback, cases and integration with CX systems. Now called EX, not Engagement
Focus on benchmarking.	Focus on feedback.	Focus on behavior change.	Focus on action.
<i>Survey technology.</i>	<i>Mobile, easy to use.</i>	<i>Useful data & learning.</i>	<i>Instrumented actions and alerts</i>

Employee Listening: Upping The Game



GLIN1

Perceptyx

waggl

SurveyMonkey

questback

StandOut.
Powered by ADP

QUANTUM
WORKPLACE

cultureiQ

Confirmit.

humu

workday.

cornerstone
realize your potential

TINYpulse

GALLUP

MEDALLIA

qualtrics XM

Culture Amp

Willis Towers Watson

Peakon

PERCEPTION
BY ULTIMATE SOFTWARE

BRIDGE
BY INSTRUCTURE

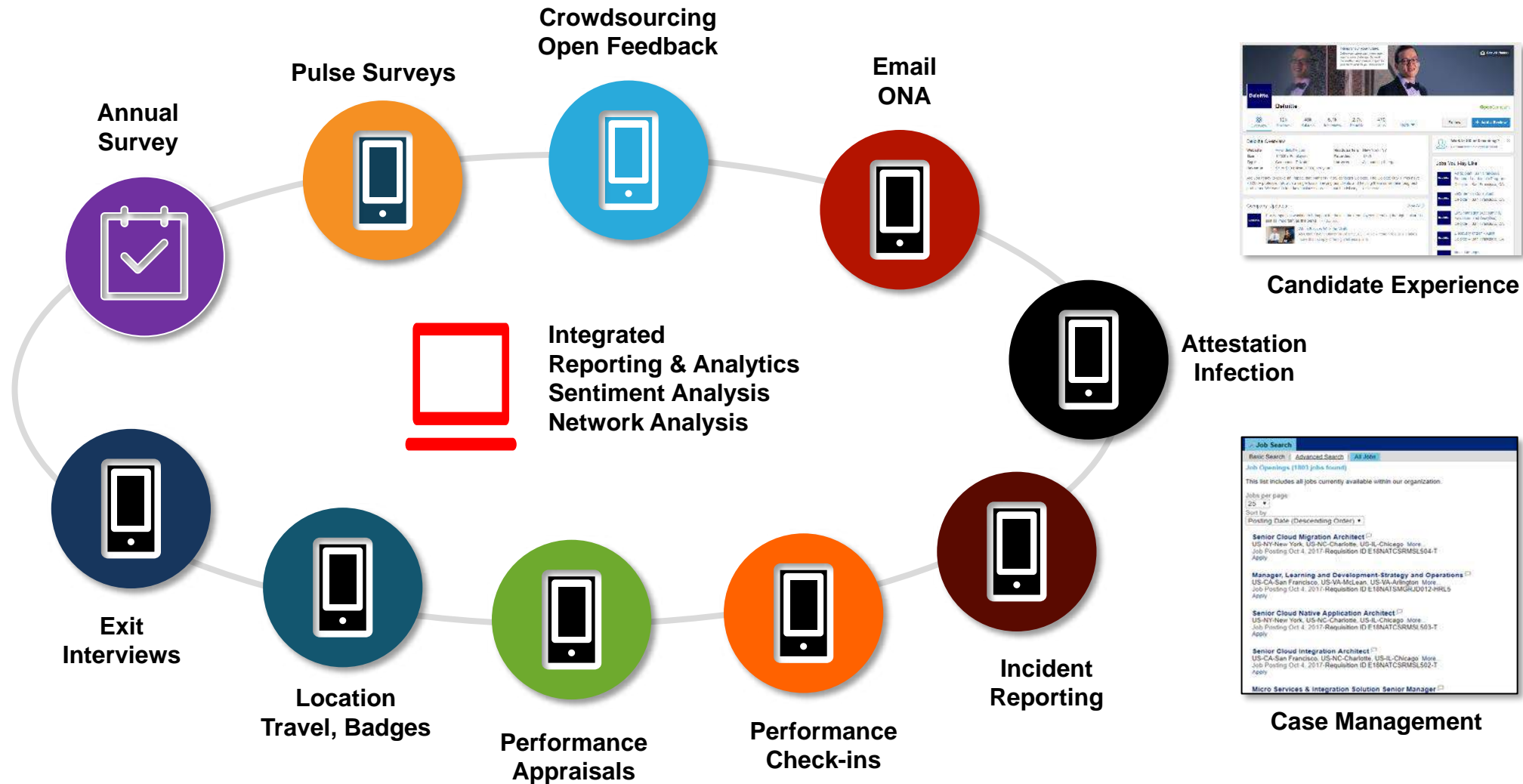
An Employee Listening Strategy



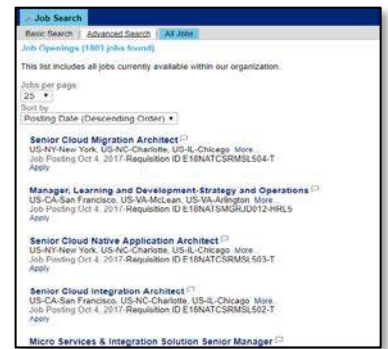
Customer Experience



Employment Brand



Candidate Experience



Case Management

Market Slowly Starting To Converge

Performance Management	Team Management OKRs	Engagement, Analytics	Recognition, Rewards
       	       	          	      

Where These Vendors Are All Going



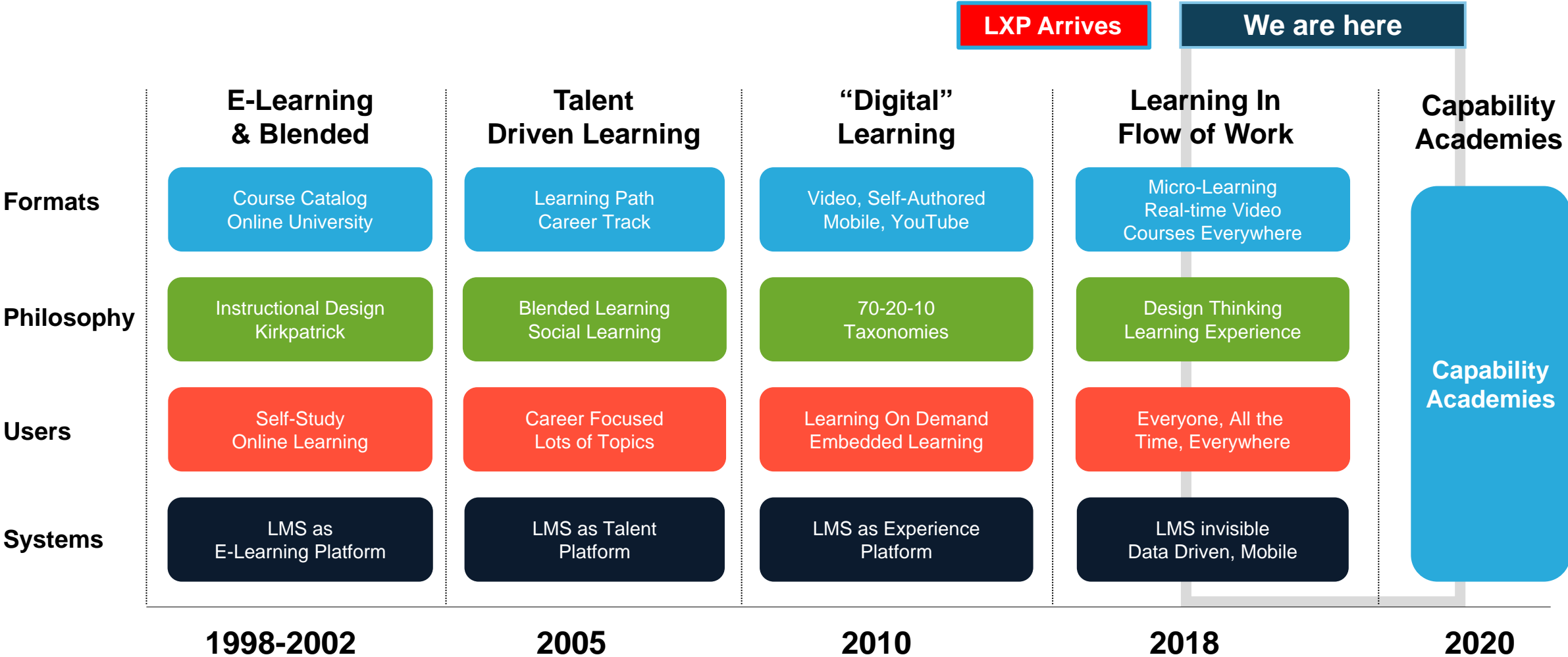
4

New Generation of Learning Platforms

LXP | Skills | Real Capabilities



How Corporate Learning Has Evolved



The Corporate Learning Market Has Exploded



Explosive Growth In MicroLearning

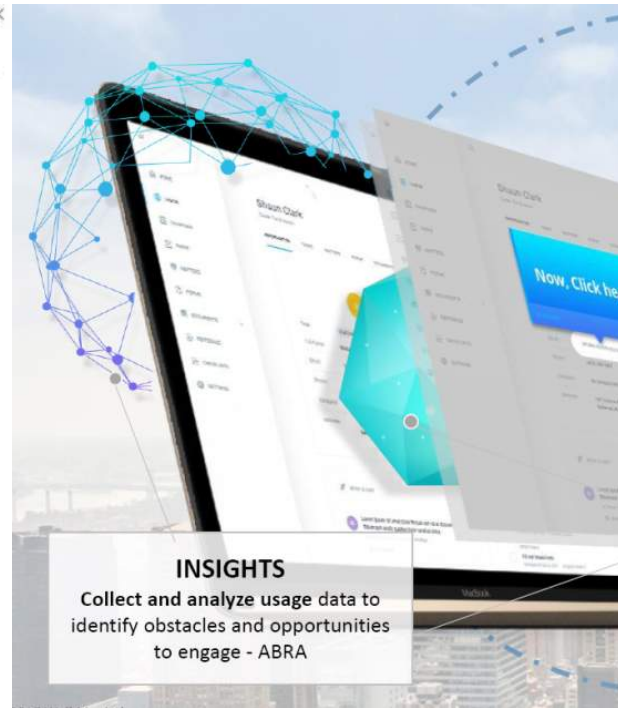
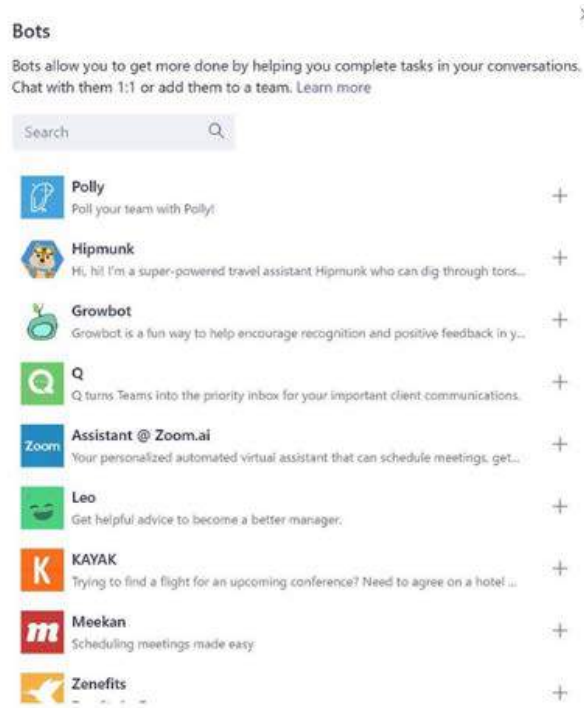
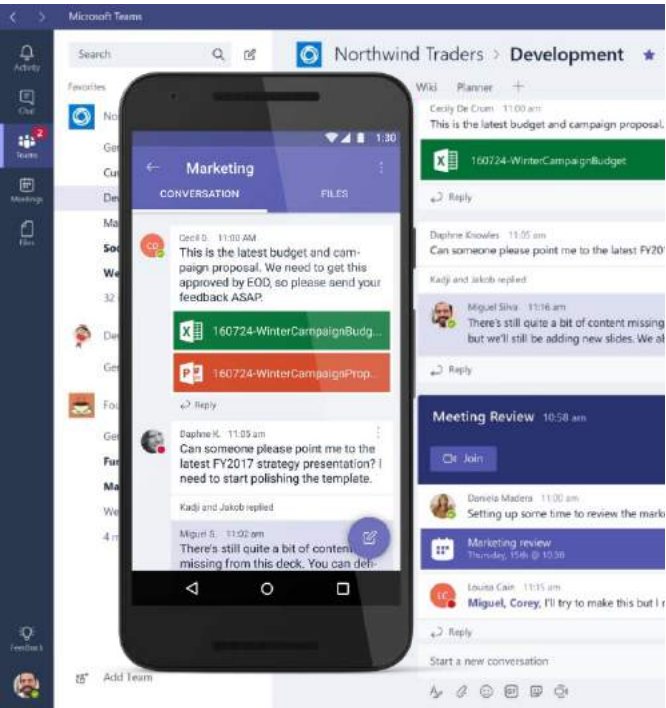
Micro-Learning	Macro-Learning
<i>I need help now.</i>	<i>I want to learn something new.</i>
<ul style="list-style-type: none">• 2 minutes or less• Topic or problem based• Search by asking a question• Video or text• Indexed and searchable• Content rated for quality and utility	<ul style="list-style-type: none">• Several hours or days• Definitions, concepts, principles, and practice• Exercises graded by others• People to talk with, learn from• Coaching and support needed
<i>Is the content useful and accurate?</i>	<i>Is the author authoritative and educational?</i>
<i>Videos, articles, code samples, tools</i>	<i>Courses, classes, MOOCs, programs</i>

What Are PowerSkills? The Skills of Success.

Optimism	Curiosity	Tenacity	Flexibility	Integrity
Learning	Generosity	Joy	Teamwork	Communication
Drive	Ethics	Empathy	Followership	Time Management
Happiness	Patience	Kindness	Forgiveness	Awe

Source: IBM, Greater Good Science Center, Pymetrics, Josh Bersin

Learning Will Appear Everywhere



INSIGHTS
Collect and analyze usage data to identify obstacles and opportunities to engage - ABRA

A screenshot of the SAP 'Display Customer Balances' report. The report shows a table of balances for a customer (1000) and company code (1010) for the fiscal year 2016. The currency is EUR. The table has columns for Period, Debit, Credit, and Balance. A 'Cumulated Balance' column is also present at the bottom right.

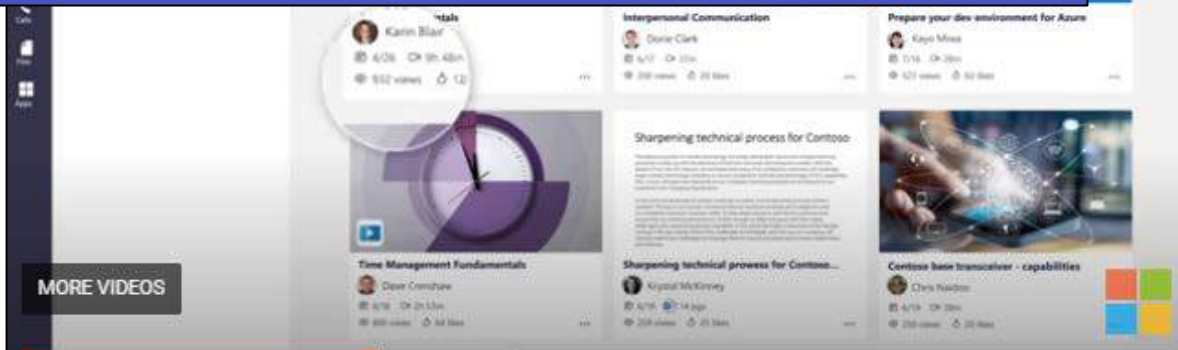
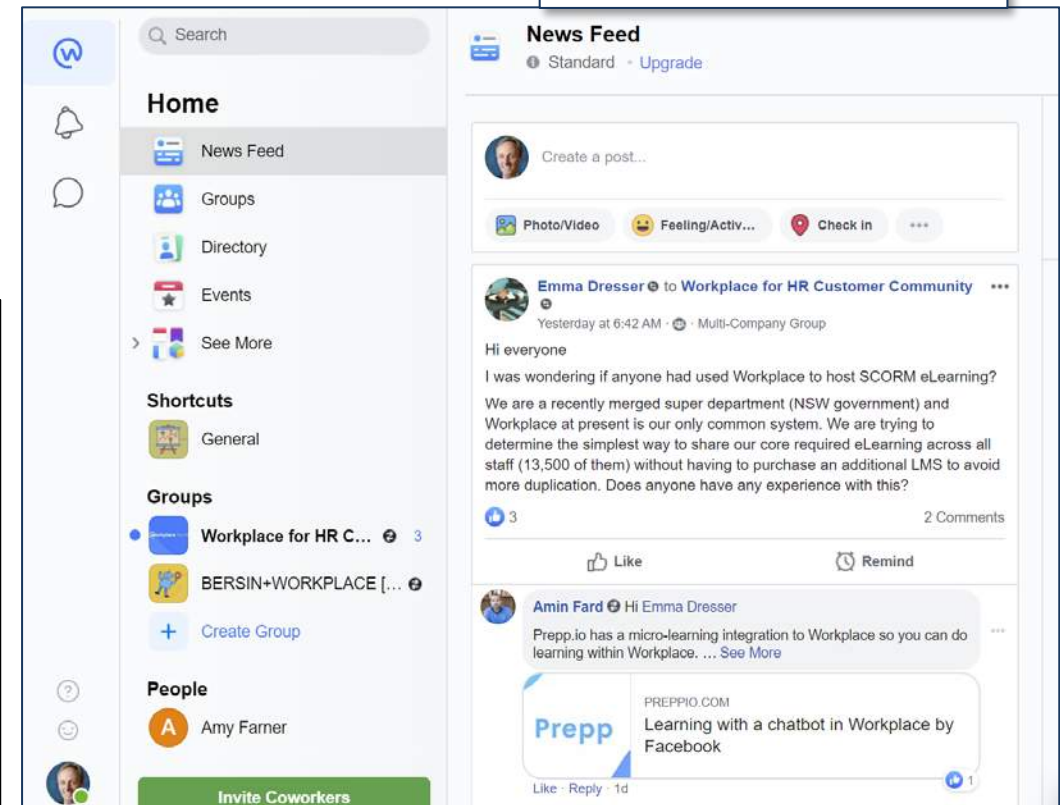
Period	Debit	Credit	Balance
Opening Balan...			552,991.11
01	995,914.11	433,933.00	552,991.11
02	91,683.00	32,409.27	59,273.73
03	50,043.00	14,330.00	45,713.00
04	376,283,336.12	69,193.00	376,204,143.12
05	424,010.98	75,670.00	348,340.98
06	75,300.18	65,660.44	9,639.74
07	553,976.47	595,428.25	-341,451.76
08	57,819.00	69,344.00	-11,525.00
09	276,525.57	85,601.55	189,924.51
10	909.00	100.00	809.00
11			



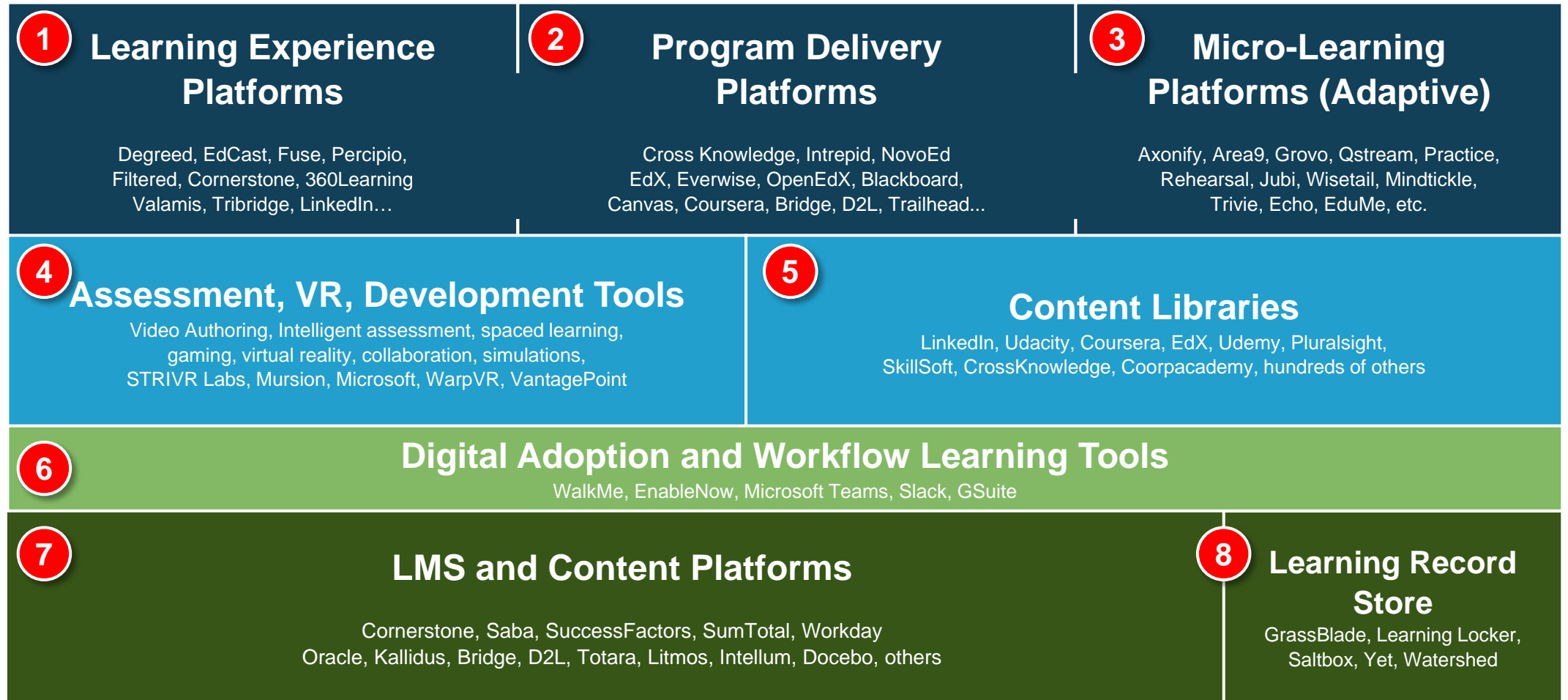
Learning In The Flow Of Work



Learning app in Microsoft Teams
Enabling learning in the flow of work



How The Learning Tech Market Looks



VR Market Is Exploding



 STRIVR

96%

reduction in training from
8 hours to 15 minutes

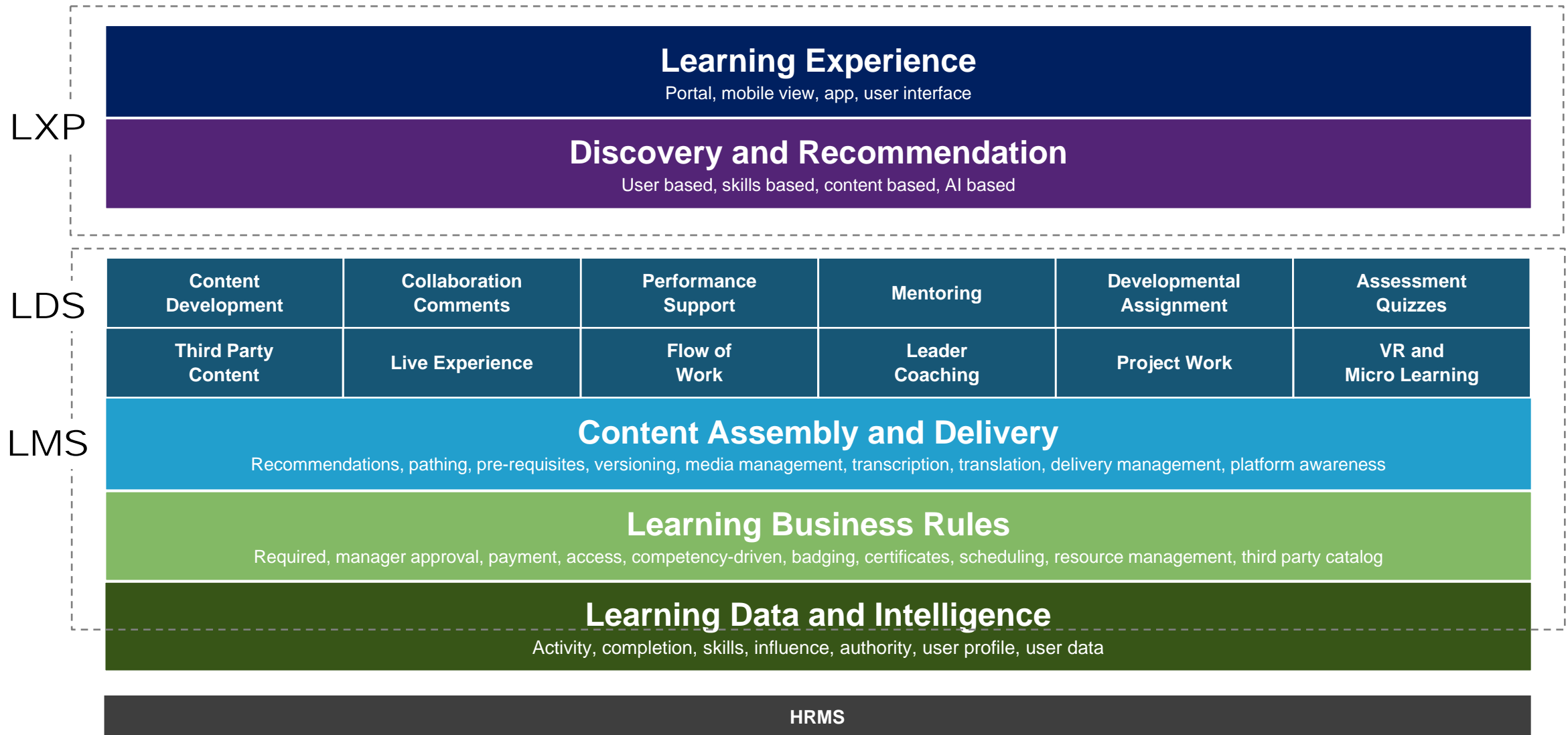
Walmart 

10%

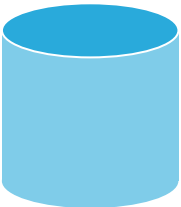
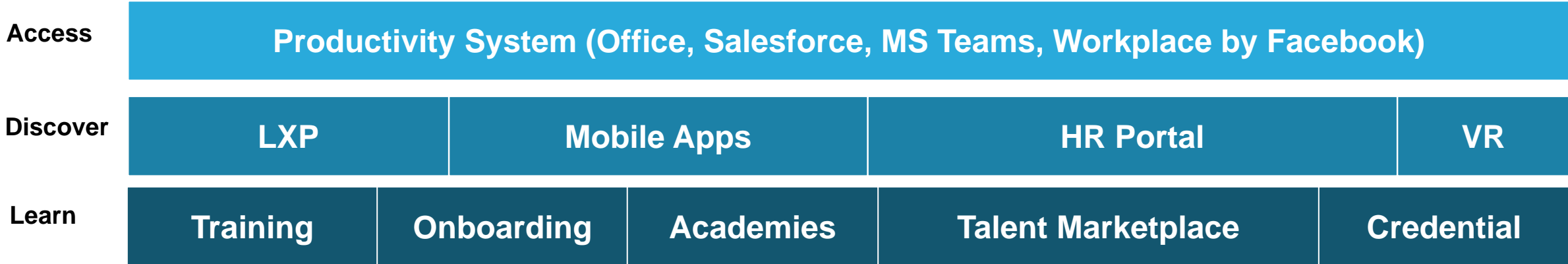
increase in customer
satisfaction in 6 months

Fidelity

The Complexity Of Corporate Learning



Learning Architecture of Today



LRS
Learning
Transaction
Data



LMS
Completion
Reporting
Data



HRMS
Job, Role,
Hierarchy,
Person Data



Content
Learning
Content and
Video Data



Skills
Skills data
Associated
With person



Providers
LinkedIn
Skillsoft
Others

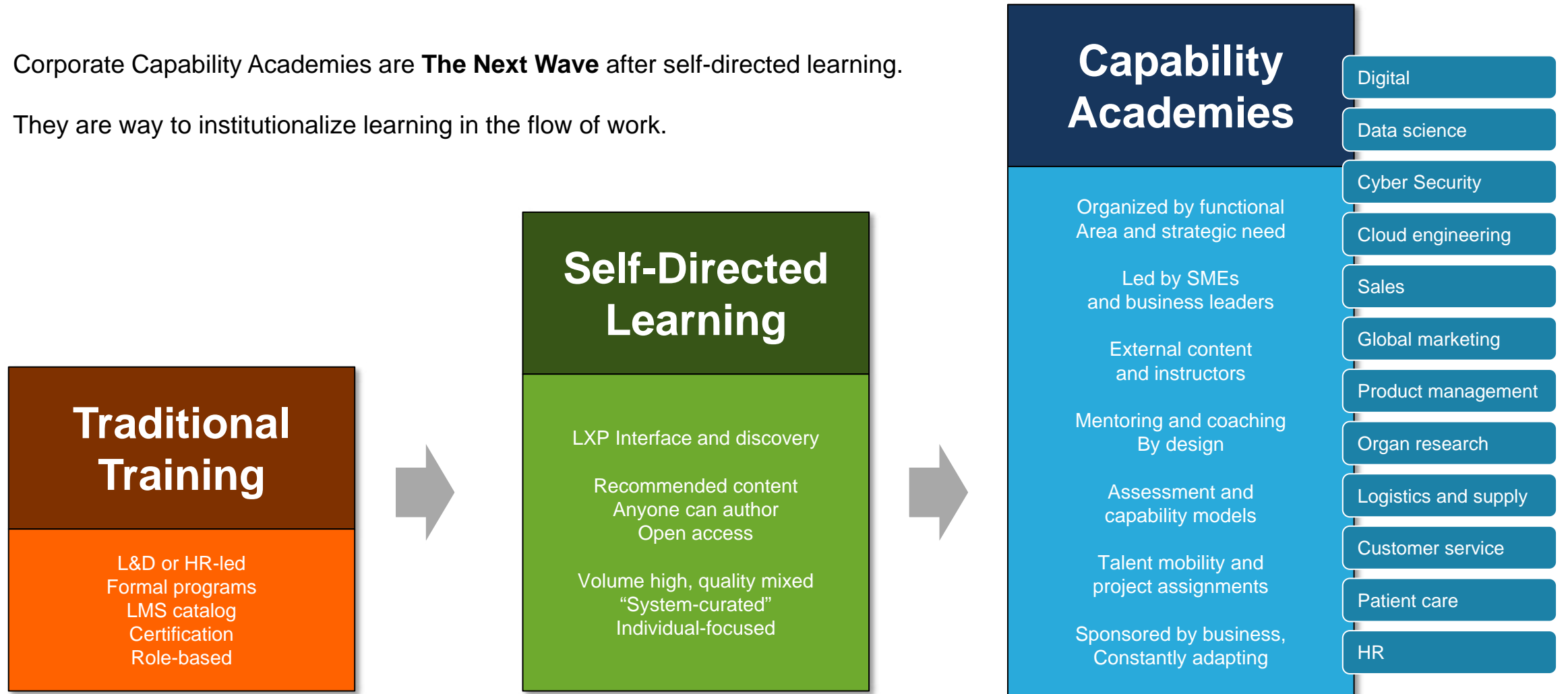
The War Of The Skills Clouds



The Next Step: Capability Academies

Corporate Capability Academies are **The Next Wave** after self-directed learning.

They are way to institutionalize learning in the flow of work.



What Is An Academy?

a·cad·e·my

/əˈkədəmē/ 

noun

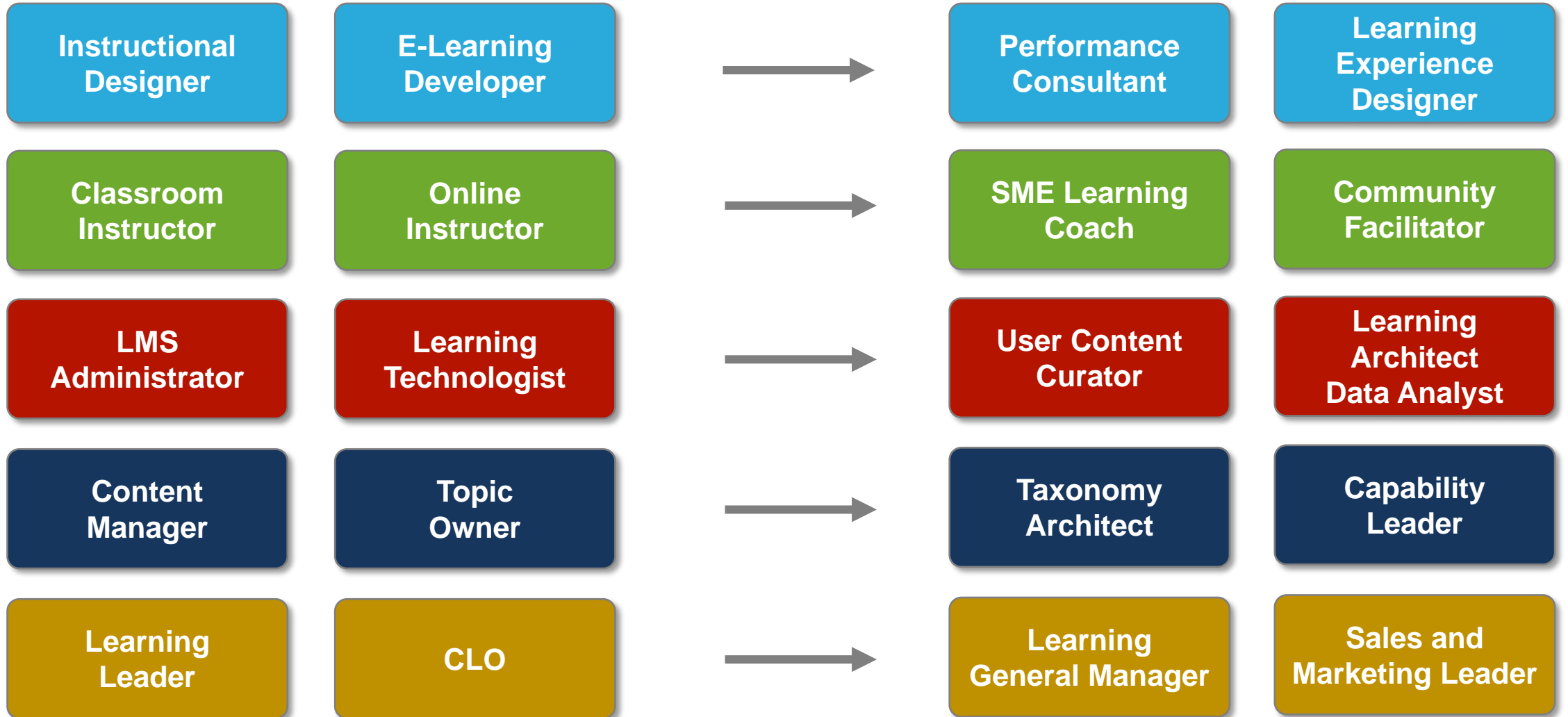
noun: **academy**; plural noun: **academies**



1. An Academy is a place of study in a special field, “a police academy.”
2. A society or institution of distinguished scholars, artists, or scientists, that aims to promote and maintain standards in its particular field.

1. An Academy is a place you go to study, learn, and advance your professional capabilities.
2. An Academy is a place you go to update your skills and knowledge in your field on a continuous basis.
3. An Academy is a place you go to transform your career, change jobs, learn to get promoted.
4. An Academy is a place experts go to teach, share, collaborate and advance the state of the profession.
5. An Academy is a place the profession relies on to build and maintain standards, thought leadership, and new directions of the field.

Evolving L&D Roles: Capability Development



Derived from LPI Capability Model, #LPICapMap

Learning In The Flow Has Arrived

We have used our LXP or other systems for Learning in the Flow of Work

3%

We are developing implementation plans for Learning in the Flow of Work

21%

We are augmenting existing programs with Learning in the Flow of Work content.

53%

We have no plans for Learning in the Flow of Work

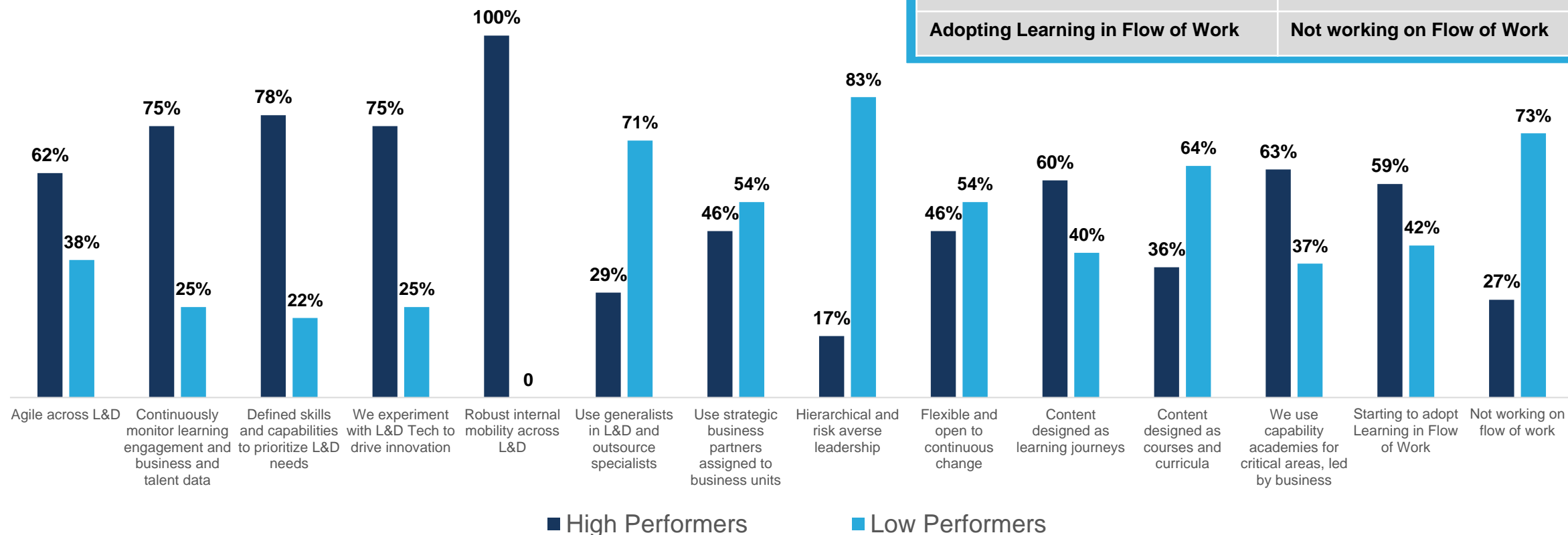
24%

76% of companies are planning or doing this now.

Adaptive Learning Research, Josh Bersin Academy and NIIT, not yet published.

Adaptive Learning Drives Performance

JBA-NIIT Adaptive learning research, 53 companies, more than 14 million learners, High Performers are top 30% of sample based on business growth and Glassdoor ratings.



High Performers	Low Performers
Agile across L&D	Waterfall process
Monitor learner engagement	No real measurement of learner sat
Experiment with L&D and technology	Wait for others to pioneer new ideas
Move L&D team into and out of L&D	Little or no job rotation out of L&D
Design content as journeys not programs	Outsource specialists to others
Focus on capability academies	Focus on hierarchical buyers of L&D
Adopting Learning in Flow of Work	Not working on Flow of Work

5

Careers In the Future of Work

Career | Work | Talent Marketplace



Three Models for Talent Mobility

Planned	Facilitated	Agile
<ul style="list-style-type: none">• Skills and experience• Tenure and reputation• Assessments, gated paths	<ul style="list-style-type: none">• Needs of the business• Developmental needs• May be stretch assignment	<ul style="list-style-type: none">• Changeable at any time• Based on interest and skills• Skills models may help

Clear functional career paths which employees traverse over time with succession, talent reviews, and manager-led coaching integrated into talent management.

Job moves, relocations, stretch assignments, and promotions are facilitated outside the model for high-potentials, critical talent needs, restructuring, M&A, and other rapid changes.

Individuals can find new gigs, assignments, jobs, and roles themselves, apply for jobs, and move internally – including gig work and projects.

The Talent Marketplace Arrives

innerMobility

Career

Projects

Good morning, Pauline
23 Opportunities are waiting for you today

Explore / 23 Saved for later / 2 Wishlist / 7

All opportunities Full-time job Project Mentorship

Project +

Finance Manager for Future Leaders League 2019 Organising Team
Not location specific

Position +

HR Content Expert for Digital Experiences Flagship 2020
Boston, MA, USA

Mentorship +

Be a mentor for Janina Bärbel
Toronto, Canada

More details



This is not just about adding a few more coding lessons. It is about fostering critical thinking, independent problem-solving, and lifelong learning that can help people adapt to change.”

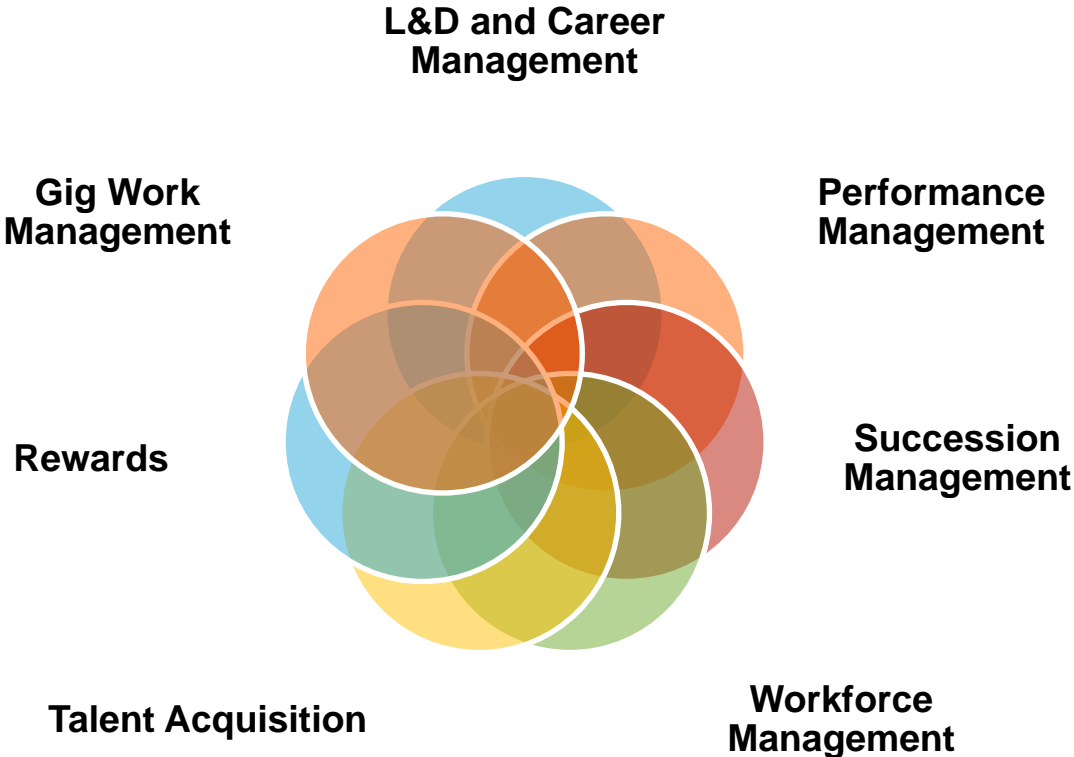
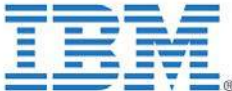
- Christine LaGarde

Vendors Fit Different Models of Talent Mobility

Career Development	Planned	Facilitated	Agile	Sourcing & Recruiting
	<ul style="list-style-type: none"> • Skills and experience • Tenure and reputation • Assessments, gated paths 	<ul style="list-style-type: none"> • Needs of the business • Developmental needs • May be stretch assignment 	<ul style="list-style-type: none"> • Changeable at any time • Based on interest and skills • Skills models may help 	
	Development Planning		Gig Work Management	



Talent Marketplace Is Central To Talent Management



6

Wellbeing Meets Employee Experience

Health | Productivity | Meaning



An Explosive Market

- \$46 billion market growing at 4.8% per year
- 32% of payroll now spent on benefits, a 19% increase in last 8 years
- Healthcare and wellbeing program spending increased by 43% in the last five years
- Only 10% of workers have access to workplace wellness programs



https://globalwellnessinstitute.org/wp-content/uploads/2018/10/Research2018_v5webfinal.pdf

The Corporate Wellbeing Market: Explosive Growth Continues

62% of Americans feel significantly more stress than a year ago.
- American Psychological Association

The #1 issue at work today is "I feel tired."
- MetLife Survey of 9,000+ May 2020

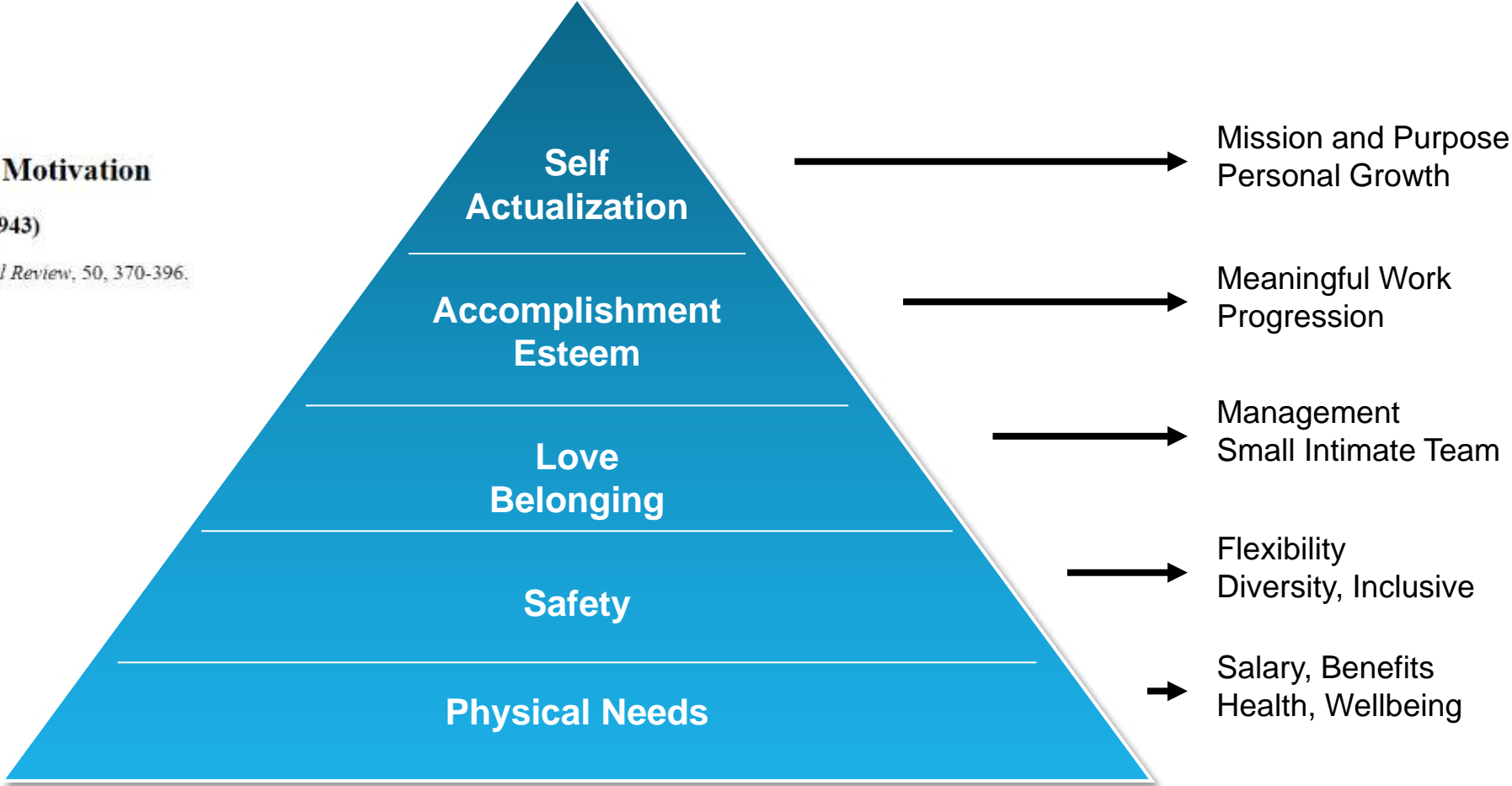
joshbersin

What Really Matters

A Theory of Human Motivation

A. H. Maslow (1943)

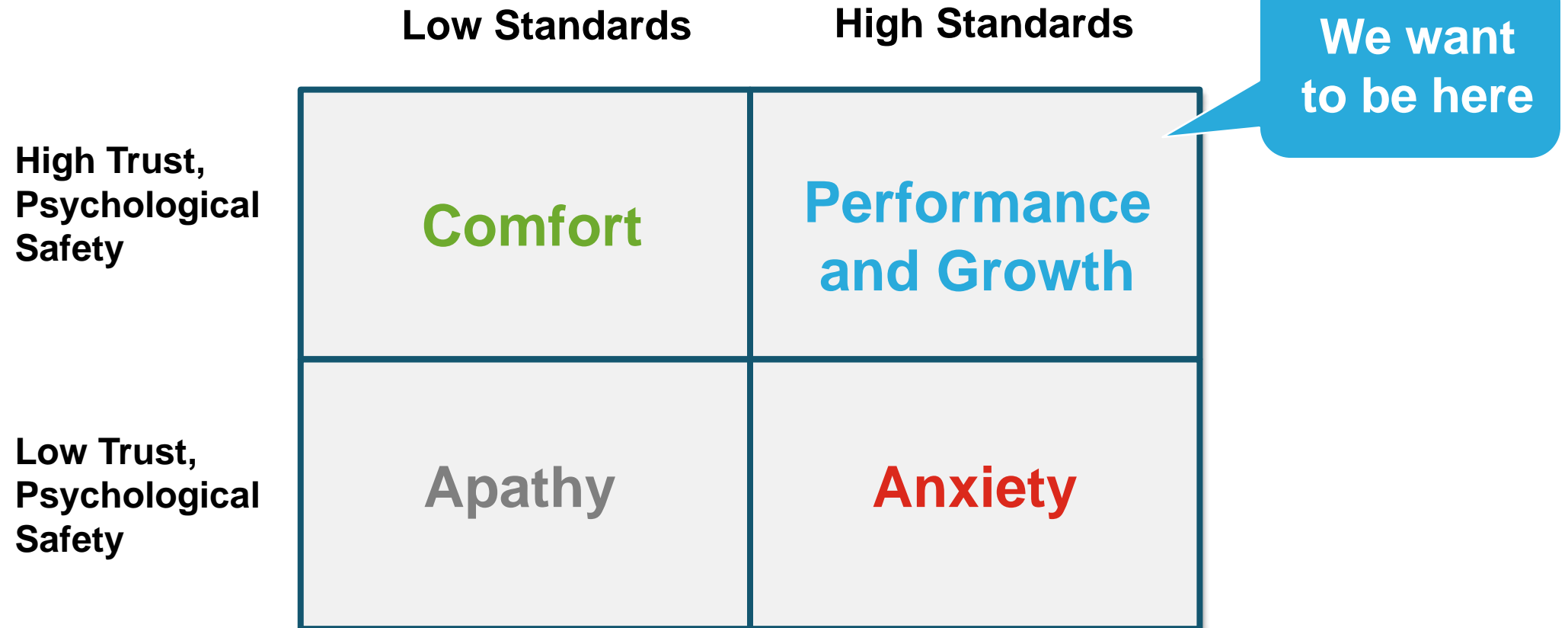
Originally Published in *Psychological Review*, 50, 370-396.



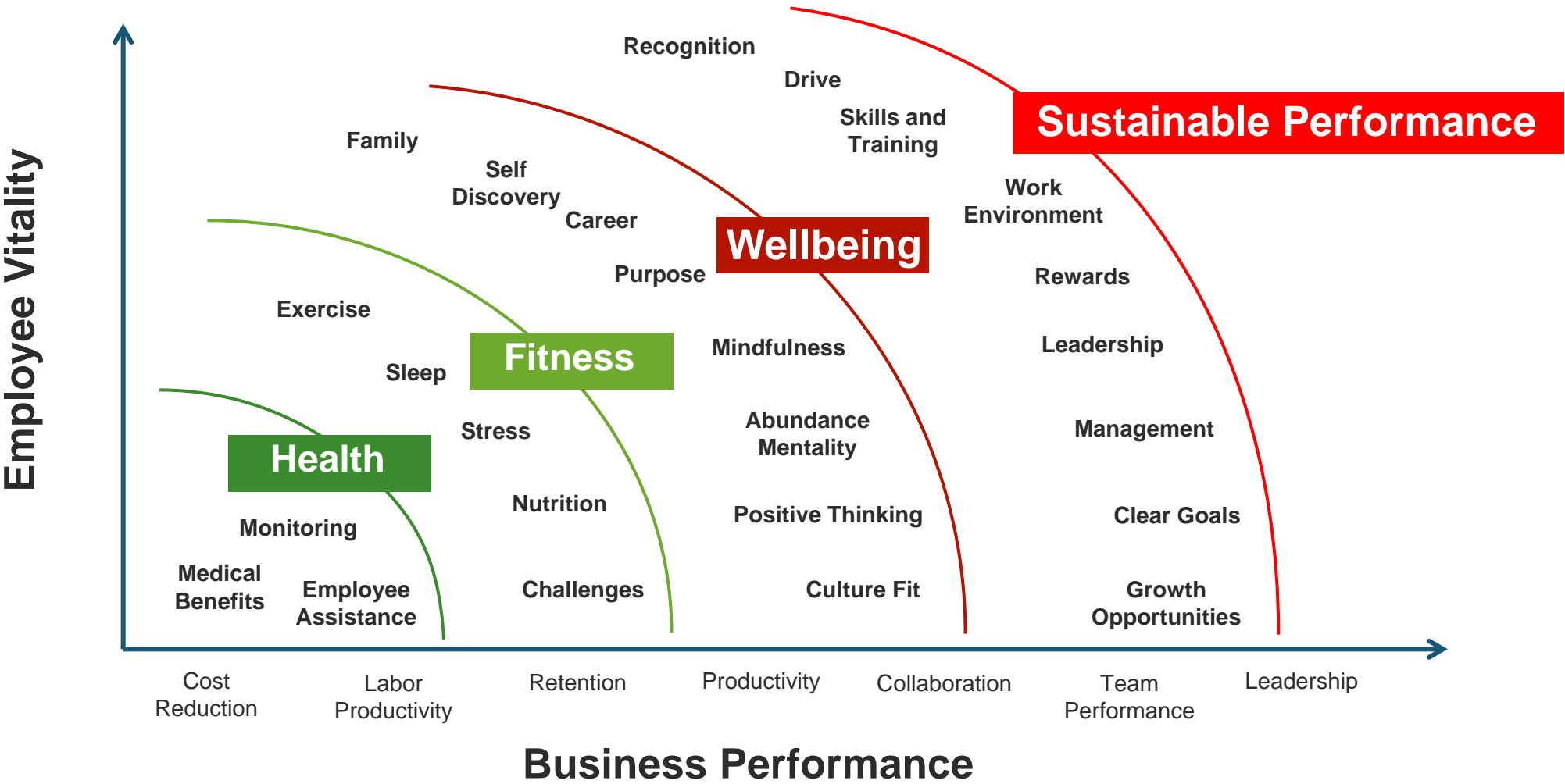
Remote Work. The Five Topics To Consider

Tools	Rules	Norms	Culture
<p>Integrated tools for conferencing, video, file sharing, messaging.</p> <p>Simplicity</p> <p><i>This is easy and it works.</i></p>	<p>Established practices for security, time, space, communication, style.</p> <p>Clarity</p> <p><i>I know what's expected.</i></p>	<p>How we join, appear, communicate, behave, listen, talk, and share.</p> <p>Accountability</p> <p><i>I understand how to behave.</i></p>	<p>How we get to know each other, level of hierarchy, trust, and psychological safety.</p> <p>Trust</p> <p><i>I can be myself and thrive</i></p>
<p><i>IT infrastructure, laptops, phones, systems, applications we use.</i></p>	<p><i>Security, cameras, desks, chairs, internet access, space, time.</i></p>	<p><i>Scheduled meetings, behavior on calls, face time, 1:1s, coaching, feedback.</i></p>	<p><i>Trust, empowerment, psychological safety, development, growth.</i></p>
<p>Resilience</p>			

Remote Work: Creating Psychological Safety



Wellbeing & Resilience: The New Performance Equation



VC Data: CB Insights

Explosion of Wellbeing Vendors (small subset)

Financial



Physical



Emotional



Cultural



Platforms



Maturity Model for Wellbeing Strategy

Level 4: Wellbeing for Social Good

Value: organization as a force for good; sustainability, health, and value to community
Focus on contribution to society outside of work, communities, localities, political alignment

Level 3: Wellbeing for Business Performance

Value: reduce wasted time and energy at work, help people with schedule, travel, priorities, train managers
Focus on performance sustainability, attention, focus, education, career, and total performance at work

Level 2: Wellbeing for Personal Improvement

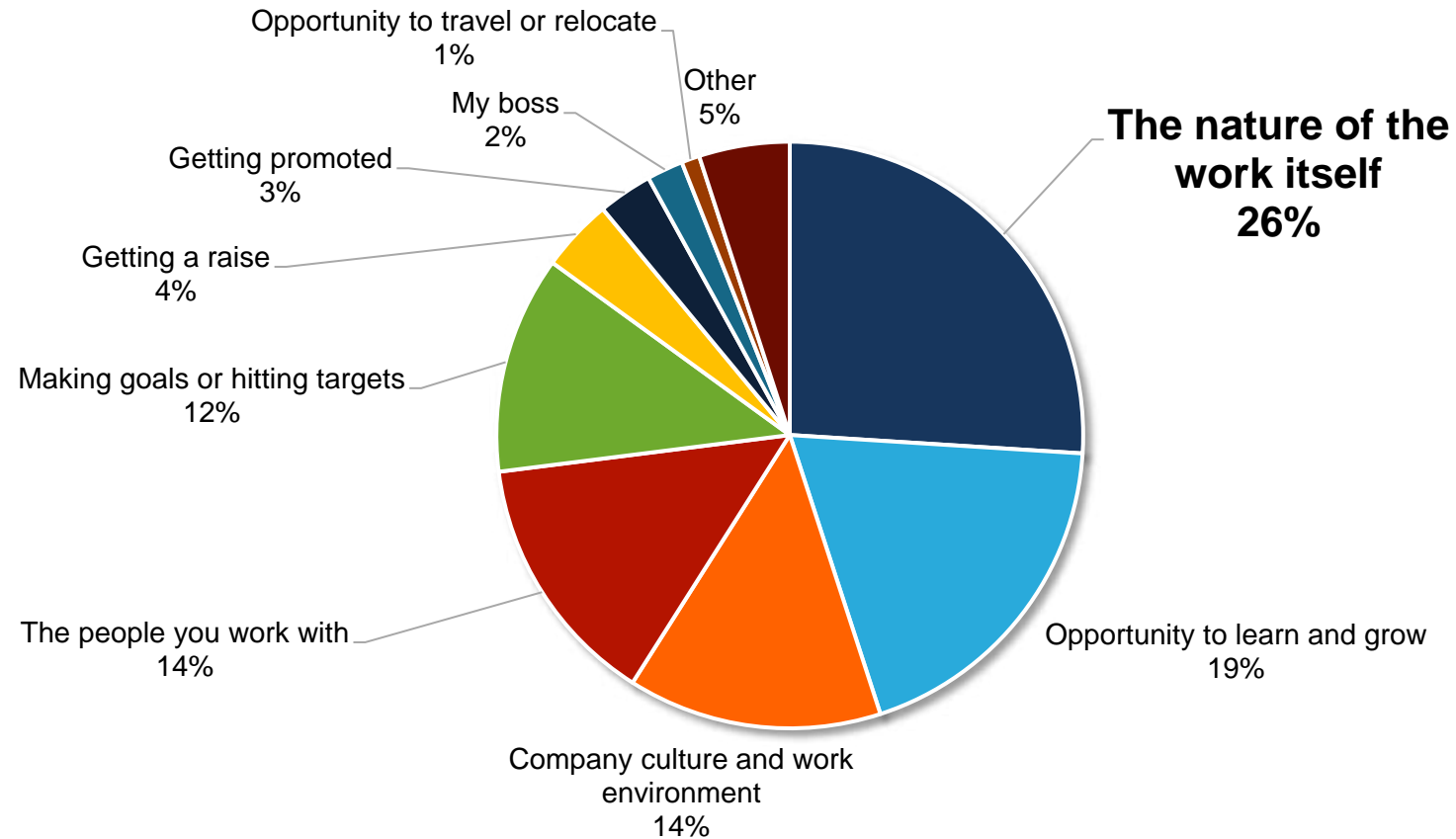
Value: make work life better, reduce stress, help employees with personal and financial wellbeing
Focus on personal, family, and financial support, education, job, and off the job tools and support

Level 1: Wellbeing as a Healthcare Benefit

Value: reduced cost, reduced turnover, improved insurance expense
Focus on disease reduction, accident prevention, overall health of workforce

What Matters Most? Meaningful Work.

What Is The #1 Thing That Inspires You To Be Happy And Work Harder?



The right job is twice as important as culture and four times more important than money

N=2,800 professionals, Fall 2018, Bersin and LinkedIn Research, <https://www.linkedin.com/pulse/want-happy-work-spend-time-learning-josh-bersin/>

7

People Analytics Is Now Essential

Merging People Data with
Operational, Location, External



People Analytics Is Now Essential

72%

of respondents rate analytics important;

1/3 are now doing some form of predictive modeling!

35% year-over-year improvement in analytics capabilities

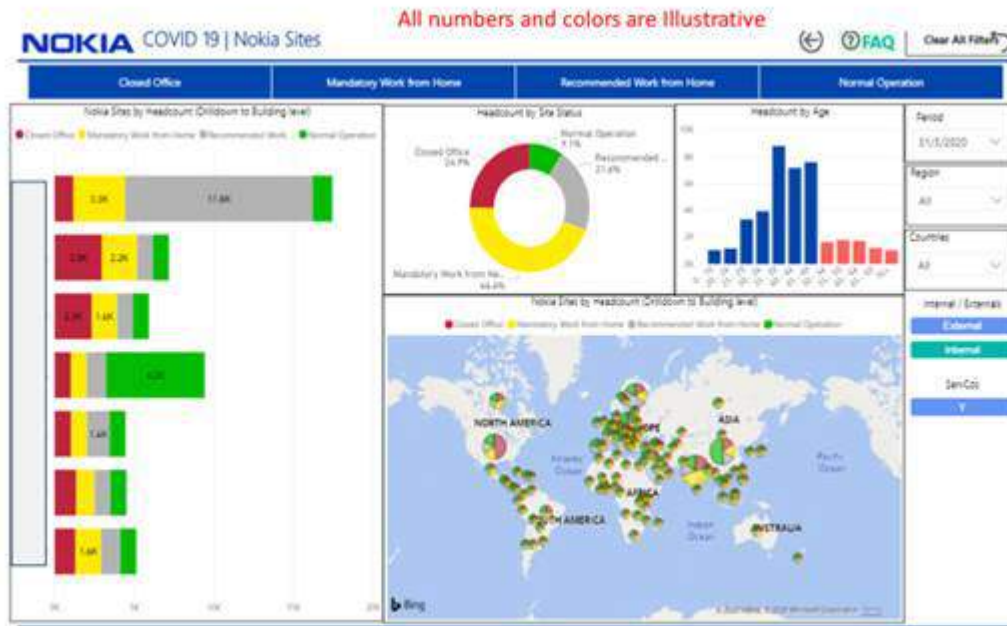
31% have increased staff, and **19% are buying new tools.**

Year over year there has been major improvement in People Analytics.

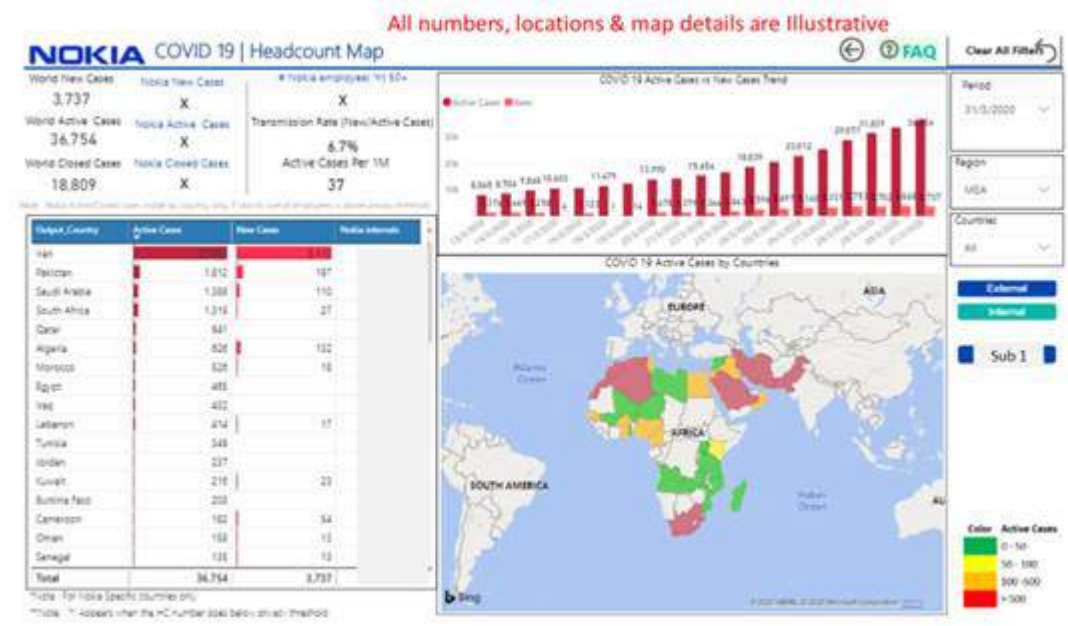
The percentage of companies who believe they are “excellent” doubled from 4% to 8%, and the percentage who are now using analytics to predict business outcomes is 34%!



Leveraging People Analytics Immediately



Work from home profile.



Headcount by affected location.

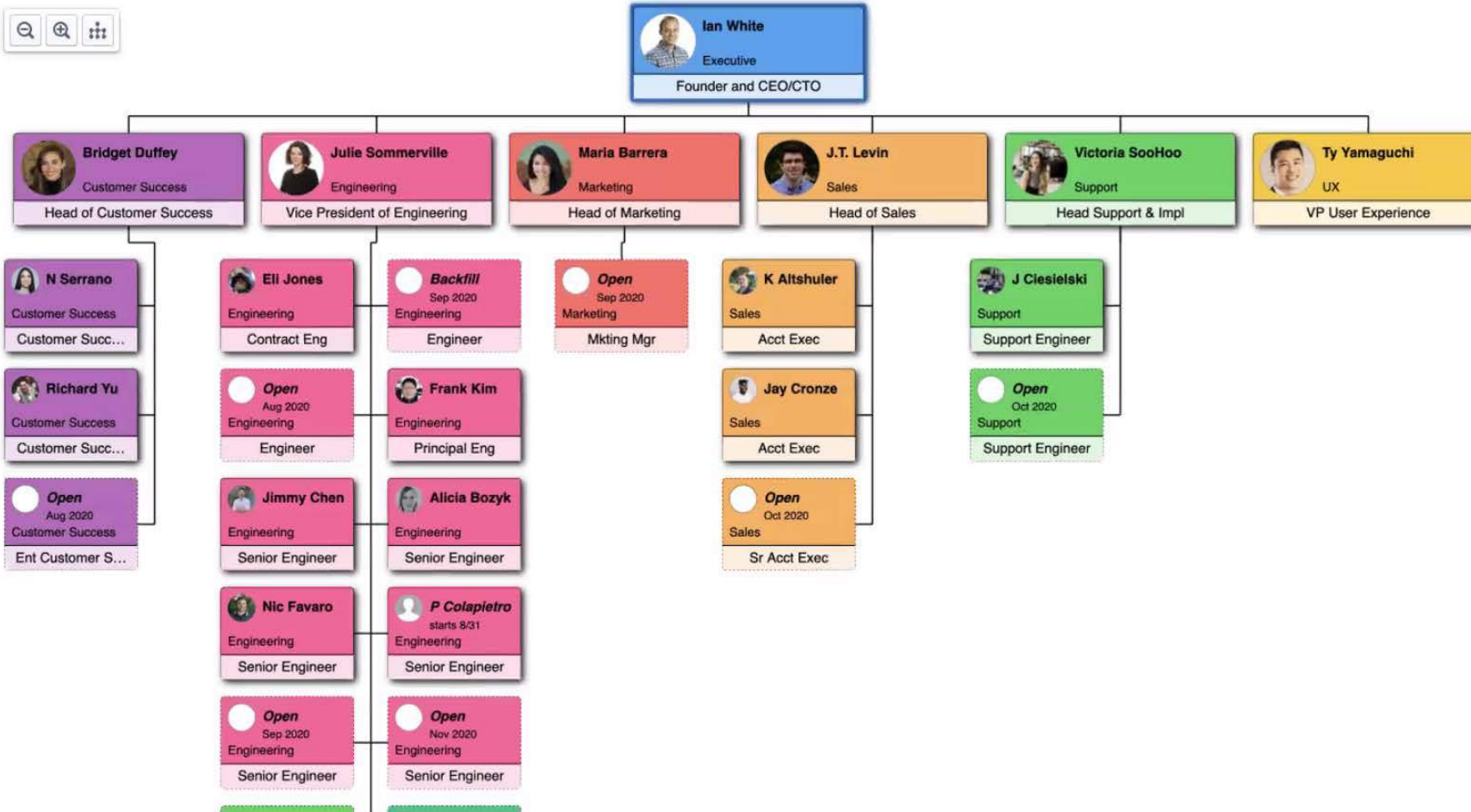
Visual People Analytics

Scenario Primary Date Thu Aug 27 2020 Today

Jan '18 Jan '19 Jan '20 **Aug '20** Jan '21 Jan '22 Jan '23

Search by job, person, or group

Show All Jobs Highlight Department



Ian White
Founder and CEO/CTO

[View Profile](#)

[Edit Job](#) [Edit Person](#)

[Move](#) [Backfill](#) [Terminate](#)

[Add Report](#) [Clone Job](#)

[Details](#) [Job History](#)

Founder and CEO/CTO

Managing 16 people, 11 open

Directs 6 people

Employment Full Time

Band L8 - C-Level

Department Executive

Teams Product Engineering Team Revenue Team

Location ChartHop HQ

Ian White

[Start Date](#) Jan 25 2018 (2 years)

[Work Email](#) ian@charthop.com

[Mobile](#) 617-470-0081

[LinkedIn](#) [in](#)

[Twitter](#) [@eonwhite](#)

[GitHub](#) [@eonwhite](#)

[Work Phone](#) 617-470-0081

[TriNet ID](#) 00001305207

15 Keys To Success in People Analytics

Organizational

Organization Design

(Reporting, leadership, ownership)

Team Governance

(How projects are assigned, staffed, measured)

Business Partners

(How business units or HRBPs are supported)

Integration w/Finance And Ops

Workforce Planning

(data, knowledge, and processes for WFP)

Skills

Business Knowledge

(Understanding of the systems, data, finance, and business itself)

Analytics Skills

(data, statistics, reporting skills)

Engineering Skills

(SQL, dbms, cloud, ETL expertise)

Visualization Skills

(presentation, visualization, story telling)

AI & Model Skills

(building, monitoring, and training AI)

Technical

Systems Integration

(Integrating data systems, creating a dictionary)

Data Quality

(quality, governance, ownership, trust, validity, recency of data)

Privacy and Protection

(data privacy, protection, recovery)

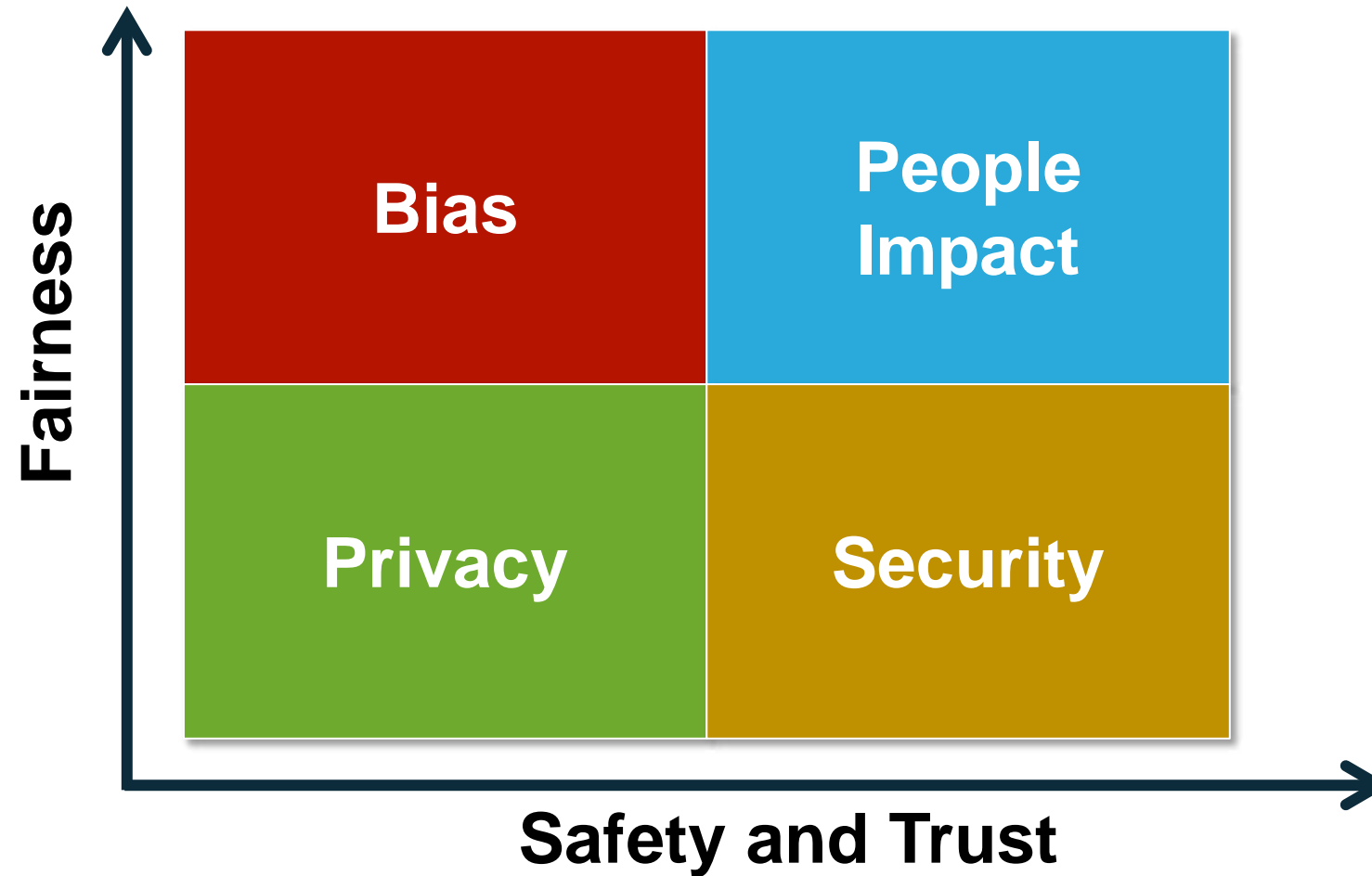
Tool Set

(visualization, analytics, and platform tools)

AI-Enabled Systems

(AI apps or systems)

A Framework For Ethics of Data and AI



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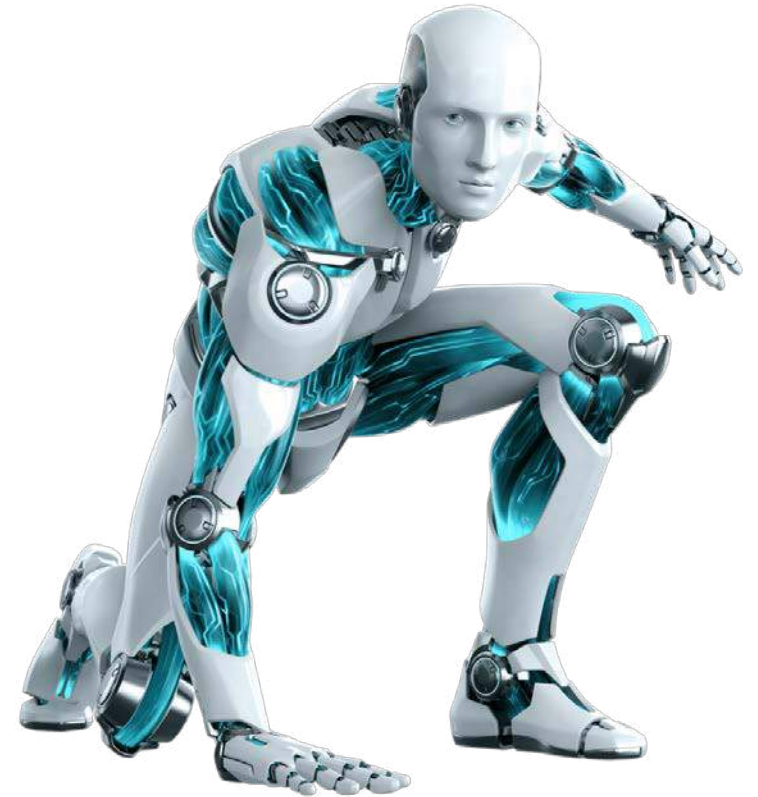
Important Vendors To Watch



8

Creating An Employee-Centric HR Tech Architecture

Flexibility | Adaptability | Growth



Lots Of Room for Improvement

“After analysis of work practices, we found that we were losing approximately **174 man-years** of wasted effort in our performance and talent review process.”



“By studying the time we spend in meetings, we found that we could save **\$24 million per year** by reducing size and frequency of meetings.”



“We had **52 different steps** and managerial actions involved to order an employee credit card.”



Crisis Response

“We took our onboarding program and turned it into a “Crisis-Response” platform **over the weekend.**”

“95% of our employees are now working at home. We developed new policies for volunteerism, family leave, and home technology **within one week.**”

“Not all our HR teams have to do crisis response. We are **still running the business,** and responding to this too.

“Our **local business partners are calling the shots now,** we are supporting them.



UnitedHealth Group



The Process Shredder at Pepsi

BE CONSUMER CENTRIC
Share your ideas

ACT AS OWNERS
Share your ideas

FOCUS & GET THINGS DONE FAST
Share your ideas

VOICE OPINIONS FEARLESSLY
Share your ideas

RAISE THE BAR ON TALENT & DIVERSITY
Share your ideas

CELEBRATE SUCCESS
Share your ideas

ACT WITH INTEGRITY
Share your ideas

THANKS FOR TAKING PART!
POP BACK ANY TIME!

Make life at PepsiCo simpler...

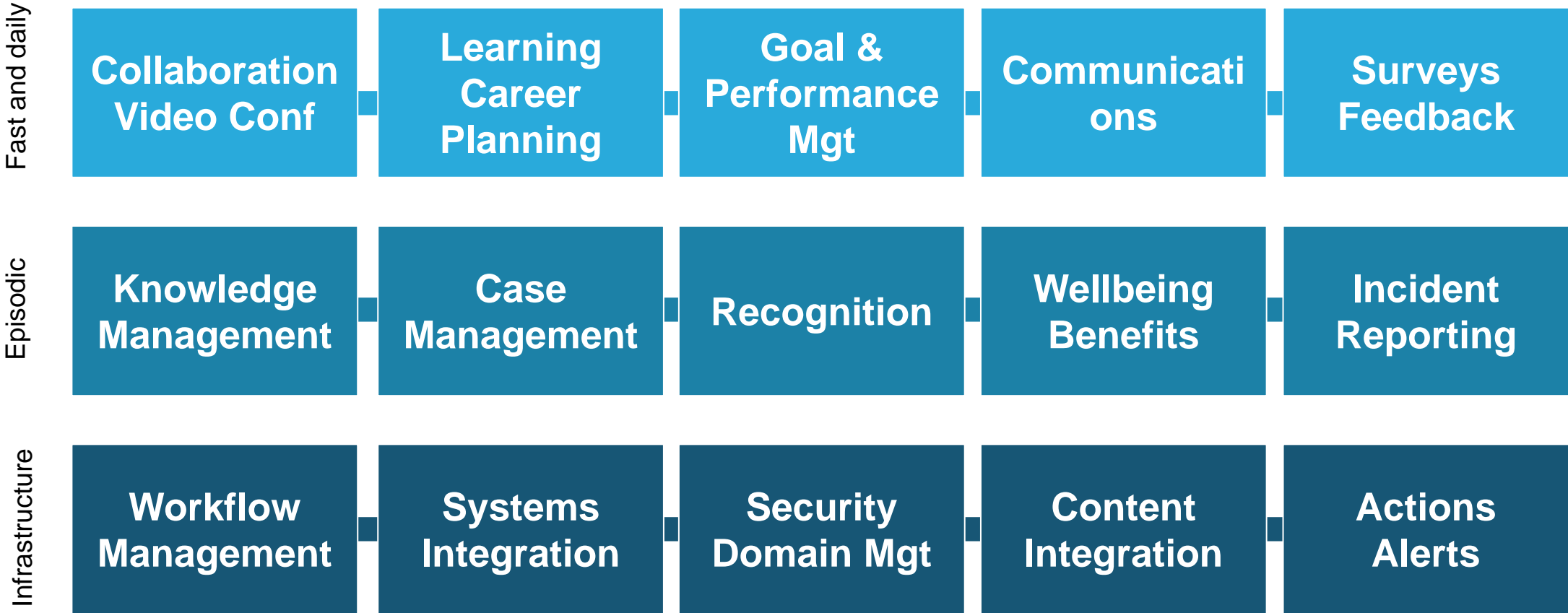
Happy to live The PepsiCo Way, but see something blocking you? If you could remove one barrier, what would it be?

Name one process that stops you from getting things done fast >

[Read our confidentiality statement](#)

PEPSICO

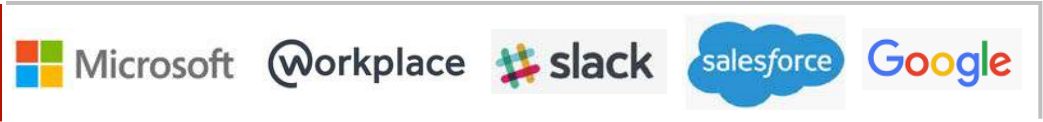
Focus On Employee Experience Apps



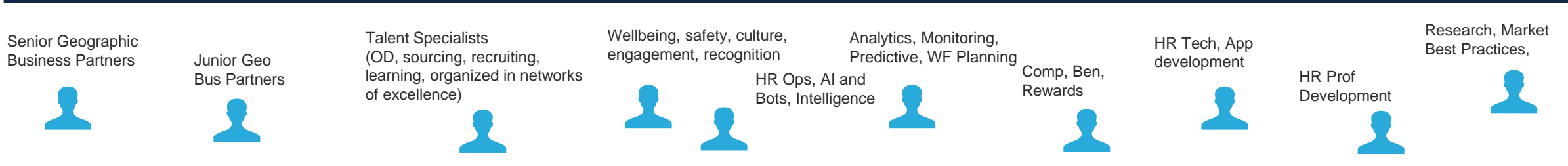
HR Technology Architecture: 2021 and Beyond



Work Tech: Systems of Productivity



Employee Experience Workflows: Chat | Survey | Communicate | Route Cases | Resolve





Welcome to the Josh Bersin Academy

The Josh Bersin Academy is a global community of HR professionals connected through powerful digital learning experiences that combine the best HR learning and education on the planet with unparalleled opportunities to collaborate with your peers. The Academy's mission is to prepare the HR community for the radical disruptions already happening in the workplace.



Josh Bersin
Founder, The Josh Bersin Academy

WATCH VIDEO

<https://bersinacademy.com>

[Programs](#) [Resources](#)



The HR Tech Workshop

HR Technology Market 2021

Disruption Ahead

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Bersin Academy members will receive a copy of this report.