



April 6-8, 2010  
Renaissance Vinoy  
Resort & Golf Club  
St. Petersburg, Florida



For questions and more  
information, email  
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or call 203-434-4804.

# The Only Research Conference on Enterprise Learning and Talent Management

## Session Descriptions

### Special Sessions:

#### Executive Roundtables

Josh Bersin, *President*, Bersin & Associates

Tuesday, 1:30 to 2:45 PM

Tuesday, 3:00 to 4:15 PM

By invitation only; attendance limited. These sessions, reserved for senior learning and HR executives, will be facilitated forums for frank discussion on issues such as organizational restructuring, budget prioritization, globalization, integrated talent management, adapting talent-related processes to current business challenges, technology strategies, and much more. For more details, contact [elaine.lonergan@bersin.com](mailto:elaine.lonergan@bersin.com).

#### Defining a Social Learning Strategy

David Mallon, *Principal Analyst*, Bersin & Associates

Max Meadow, *Director, Strategic Services*, Bersin & Associates

Tuesday, 1:00 to 2:45 PM

Most corporate learning organizations can't create programs fast enough to meet their learning needs. High-impact learning organizations are incorporating into learning strategies a variety of informal learning approaches to achieve new efficiencies. "Formalized informal learning" requires new skills sets, disciplines, technologies, and audience perspectives – as well as a highly defined, carefully crafted learning architecture.

In this activity-driven session, we will use data from the recent study, *High-Impact Learning Practices*, as well as real-world examples of informal learning in practice to work through sample processes for designing an informal learning strategy. We will also discuss what steps an organization should take to begin implementing such a strategy.



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## Advancing Your Integrated TM Strategy

Stacey Harris, *Principal Analyst & Director of Research Operations*, Bersin & Associates

Barb Arth, *Principal Consultant*, Bersin & Associates

Tuesday, 3:00 to 4:45 p.m.

You've already invested in defining your core talent processes: competency management; talent acquisition; performance management; career and succession management; and, leadership development. Now, to take your strategy to the next step, you need to:

- Link talent processes to ensure greatest business impact
- Ensure existing technology can support process automation
- Evaluate and select a talent management technology provider
- Implement governance to ensure alignment and input from executives and lines-of-business
- Define metrics to gauge success

During the session, facilitators will share and discuss best practices, practical applications, and case studies. Topics covered include:

- Talent strategy planning
- High-impact HR organizational structures and roles to support talent management
- Talent management suites
- Talent analytics and business impact



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### **CLO for a Day**

Bob Danna, *Executive Vice President*, Bersin & Associates  
David Vance, *Founder and Former CLO*, Caterpillar University

Friday, 8:00 a.m. to noon

Well, really a half day.... Designed to increase the business acumen of training and HR professionals, this special workshop utilizes state-of-the-art simulation to give you the opportunity to walk in the shoes of a senior learning executive. Participants will learn how to apply benchmarking, best practices, and business and economic concepts to significantly increase the effectiveness and efficiency of the training function and increase returns on investment.

The workshop leverages Bersin & Associates' benchmarking data, best practices from its high-impact learning research, and direct experiences in launching and managing a world-class, business-focused learning organization. During the simulation exercises, participants will be given multiple corporate and learning objectives and budget and staffing parameters. Teams of participants will work together to solve problems and accomplish objectives; each team will be scored on a range of effectiveness and efficiency metrics.

This workshop is intended for learning and HR professionals who manage learning functions, programs, or staff and who want to understand and implement best practices in developing business strategies and plans for the effective management of world-class learning organizations.

Participants will learn:

- Best practices in running training like a business
- What CEOs expect from training initiatives and organizations
- How to strategically align learning to corporate goals
- How to develop a compelling business case for learning
- How other companies have implemented these practices



## Keynotes:

G1

### **Enabling the Globally Integrated Workforce**

Ted Hoff, *Vice President, Center for Learning and Development, IBM*

Wednesday 8:00 to 9:00 a.m.

With more than 400,000 employees and 100,000 contractors, IBM is one of the world's largest employers. Forty percent of employees work remotely, and 71% are located outside of the United States. Hoff will share examples of just how IBM is managing – and leveraging – its employee talent to greatest business advantage.

Hoff will discuss the six characteristics of a globally integrated enterprise. He'll also cover specific programs and practices IBM has implemented to help it achieve higher levels of workforce management and gain more insight into its workforce.

For instance, Hoff will discuss its Corporate Service Corp, a leadership development program which gives IBMers short-term assignments within the community, government, and other organizations. He'll talk about the IBM Career Smart Framework, a centralized collection of resources for career development and learning guidance.

Based on lessons learned at IBM, Hoff will offer guidance on leveraging new collaborative platforms, gaining greater levels of insight into employees' skills and experiences, implementing processes for talent mobility, and adapting new learning and development approaches.

G2

### **New Imperatives for Learning and HR**

Josh Bersin, *President, Bersin & Associates*

Thursday, 8:15 to 9:00 a.m.

Over the last two years organizations in all industries have faced unprecedented transformation in their product and services, organizational structures, and go-to-market strategies. The economic climate, globalization, workforce demographics, and new technologies are among the factors driving the imperative to manage people differently.

In research conducted throughout 2009, Bersin & Associates has identified five key people strategies which will define success in the coming years. Bersin will describe these new trends, their potential business impact, and the internal changes required. Additionally, he'll advise you on how to engage senior executives and board members to play an active role in responding to these new trends and developing new solutions.



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G3

## How to Become a Capability Development Champion

Don Vanthournout, *CLO*, Accenture

Thursday, 3:00 to 3:45 p.m.

Accenture's consulting, technology, and outsourcing business is based in large part on the skills and capabilities of its 180,000+ people around the world. Ensuring Accenture's growing and increasingly diverse workforce has market-relevant skills is the primary focus of Don Vanthournout, Accenture's chief learning officer and head of the company's capability development organization. During this keynote, Vanthournout will present Accenture's capability development strategy and offer suggestions on how you can adapt to your own business needs. The keynote will cover these and other topics:

- Partnering with business and HR leadership
- Creating powerful learning experiences that can help employees build skills where, when, and how they need them
- Being a true champion for capability development
- Managing infrastructure and operations at a global scale
- Investing in pragmatic innovation
- Transforming the learning and HR organization to meet the business needs of tomorrow





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## Learning and Leadership Track

LL1

### Practitioner Panel: Successes in Sales Training

William Danskin, *Director, eSales and Service*, AT&T Operations, Inc.  
Nick Howe, *Vice President, HDS Academy*, Hitachi Data Systems Corporation  
David Rubenstein, *Director, Learning*, Coldwell Banker Commercial  
David Mallon, *Principal Analyst*, Bersin & Associates

Wednesday, 9:15 to 10:30 PM

An effective and knowledgeable sales force is a clear competitive advantage. The best way to achieve a great sales force is through a continuous and concerted investment in training and performance support for your sales professionals. However, many sales organizations view training with skepticism – seeing the training department as reactive and slow and traditional training programs as taking too much time away from selling.

In this session, panelists will share best practices and their own stories of sales training success. They will answer these and other questions:

- How to best align sales training programs with sales training needs?
- How to meet the learning needs of sales professionals using methods and strategies best suited for the realities of sales?
- How to accelerate the learning curve and reduce time away from selling?

LL2

### Research: Leadership Development Facts and Trends

Kim Lamoureux, *Principal Analyst and Director of Research*, Bersin & Associates

Wednesday, 10:45 to 12:00 PM

Leadership development strategies must be designed to identify and build strong individual leaders. At the same time, strategies must build bench strength at all levels of management. Relatively few organizations succeed at both.

In this presentation, Lamoureux will share findings from her 2010 study, *High-Impact Leadership Development*. She will reveal the best practices for mature leadership development, including executive engagement, talent management alignment, and comprehensive learning approaches. In addition, the session will highlight a number of case studies from world-class organizations that demonstrate the successful implementation and positive business impact of each best practice.

LL3

### Case Study: High-Impact Learning Organizations

Jubal Raffety, *Global Program Manager*, Agilent

Wednesday, 1:30 to 2:45 PM

Agilent manufactures industrial and scientific testing and measurement tools. Spun off from HP in 1999, the company has approximately 19,000 workers. Given that the company is in the business of measurement, it's no surprise that the company's learning team is focused on tying learning and development activities to business performance.

In this session, you'll learn about the initiatives that Agilent has implemented to support business objectives and how it measures results. The discussion will touch on the company's leadership development framework, a cascading development program that has been adapted to all levels of leadership, as well as individual contributors. Content supports specific business challenges; performance is tied to actual business results. Attend this session and come away with practices that can help you support your business and more tightly align with business leaders.



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LL4

### **Case Study: Social Learning and Knowledge on Demand**

Liviu Dedes, *Vice President, Organizational Development, ARAMARK*

Wednesday, 3:00 to 4:15 PM

The speed of change is accelerating exponentially; relevancy is measured in months instead of years. How do you fully leverage employee talent – likely your company's best competitive asset? ARAMARK believes the answer is through a range of social, collaborative, and informal learning activities – some currently implemented and some still in planning stages. During this session, Dedes will share ARAMARK's vision for social learning.

LL5

### **Case Study: Innovative Leadership Development**

Jayne Johnson, *Director, Learning & Leadership Development, GE*

Thursday, 9:15 to 10:30 PM

How is GE staying at the forefront of leadership development? This session will discuss several of the company's innovative practices, which include sharing perspectives with external thought leaders and taking a fresh look at curriculums and delivery approaches to address emerging business challenges. As part of its leadership development focus, GE is uncovering the capabilities its leaders will need to succeed and thrive in this reset economy, extending learning beyond the classroom by enhancing coaching and teaching capabilities within its leadership ranks, and increasing the use of informal learning. Learn how GE is working with partners such as Harvard Business Publishing to design programs that deliver content and learning experiences more closely integrated with leaders' daily work.

LL6

### **Research: Best Practices and Examples for Cultivating a Strong Organizational Learning Culture**

David Mallon, *Principal Analyst, Bersin & Associates*

Thursday, 10:45 to 12:00 PM

Recent Bersin & Associates research shows that a company's learning culture is the strongest factor in whether or not the organization's learning and development efforts will achieve business impact. A learning culture doesn't just happen; such a culture must be supported, facilitated and reinforced. Fostering and cultivating a strong learning culture is a key role and responsibility for high-impact learning organizations. In the session, Mallon presents findings from our just-published study of organizational learning culture. He'll answer these and other questions:

- What truly defines a strong learning culture?
- How does a learning culture directly affect business outcomes? Where are the strongest relationships?
- How can you elevate the importance of a learning culture to senior executives?
- Which elements are of greatest import and influence?



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LL7

## Practitioner Panel: Experiential Learning for Leadership Development

Dr. Kim Armstrong, *Senior Manager, Enterprise Lean+ Training, Boeing*  
Kee Meng Yeo, *Director Global Talent Development, Amway*  
Matt Tabor, *Leader, Action Learning Forum, Cisco*  
Kim Lamoureux, *Principal Analyst and Director of Research, Bersin & Associates*

Thursday, 1:30 to 2:45 PM

Let's face it – leaders learn best when they are placed in uncomfortable situations and undertake challenging tasks that "stretch" their abilities. Experiential learning provides leaders with this platform, exposes them to different parts of the company, and enables them to demonstrate their potential. The company benefits by testing and evaluating leaders in real-time while solving critical business issues.

In this panel discussion, participants will share best practices and insights for implementing experiential learning, including action learning, job rotation, and simulations. They will answer these questions:

- What types of experiential learning are most common or effective for different leader levels?
- What are the benefits and challenges of experiential learning?
- What are success factors for implementing experiential learning activities?
- What is the role of business leaders in defining experiential-based solutions?





## Talent Acquisition and Management Track

TM1

### Research: What Makes a High-Impact HR Organization?

Stacey Harris, *Principal Analyst and Director of Research Operations*,  
Bersin & Associates

Wednesday, 9:15 to 10:30 PM

Would your CEO agree that HR is meeting business needs today? HR organizations have a full plate – heaped with initiatives such as major business transformations, integrating talent management strategies, and developing leadership capabilities. And on the side are the responsibilities involved in the day-to-day management of HR operations. Last year, we set out to understand the most critical practices for high impact HR organizations to help you prioritize and order your approach to HR and facilitate your planning. Join us to hear the results of this research, including our *Top 10 Mandates for Business Impact*.

In our session today, we'll cover:

- HR philosophies that predict business impact
- The importance of the HR business partner role
- Global organizational structures, role definitions and governance models
- Critical centralized and/or regionalized services
- Workforce strategies and practices for organizations of various sizes
- Key gaps and challenges inhibiting successful delivery of HR initiatives
- The impact of change management on effective delivery models
- Ways to measure the effectiveness of HR programs, processes and deployed technologies

TM2

### Practitioner Panel: Best Practices for Performance Management

Jane Pierce, *Vice President, Talent and Organizational Development*, ADM

Tessa Tubbs Ekukanju, *HR Director*, PepsiCo University

David Mallon, *Principal Analyst*, Bersin & Associates

Wednesday, 10:45 to 12:00 PM

High-performance organizations design their performance management systems to support a culture of accountability and to align business strategy and operations across the enterprise. These organizations pay particular attention to ensure that the building blocks of employee performance management (e.g., goal setting, performance development planning, coaching and evaluation) are well-executed and create the optimal conditions in which people can excel. With this solid foundation, high-performance organizations are equipped to address the broader talent issues of career and succession management, engagement, and retention.

In this session, panelists will share best practices and personal experiences in taking a systematic and integrated approach to managing individual and team performance across an organization. We will compare and contrast alternative approaches to core PM practices such as goal setting and assessing employee performance, as well as strategies for ensuring that these practices are successfully and effectively adopted by management at all levels in the organization.



TM3

### **Practitioner Panel: The Latest on Onboarding**

Tracy Conn, *Assistant Vice President*, Federal Reserve Bank of Cleveland  
Roald Steen Jakobsen, *President*, BU People & Culture, Vestas Wind Systems A/S  
Cindy Naughton, *Organizational Development*, Strategic Effectiveness, RWD  
Steve Wells, *Senior Director*, Learning & Performance, Pfizer  
Madeline Laurano, *Principal Analyst*, Bersin & Associates

Wednesday, 1:30 to 2:45 PM

Too often, companies find new hires only to lose them because of weak processes for onboarding. But some companies are making innovative use of new tools and technologies to automate and strengthen their onboarding processes. Based on highlights of recent research into onboarding technology, this session will show why onboarding is so critical to retention and engagement and where it can go wrong.

(Hint: one size does not fit all workforce generations!)

TM4

### **Research: Talent Acquisition in Today's Business Climate**

Madeline Laurano, *Principal Analyst*, Bersin & Associates

Wednesday, 3:00 to 4:15 PM

Talent acquisition is one of the most dynamic and complex areas of talent management today. After the economic turmoil of the past year, organizations are looking to start rebuilding workforces and integrating recruiting strategies with other areas of talent management. This presentation will examine the major elements of talent acquisition – sourcing, screening, assessing, hiring, and onboarding. It will also focus on topics critical to talent acquisition including contact management, employer branding, and internal mobility. This presentation will help talent acquisition and HR professionals provide guidance on these and other topics:

- How to develop a comprehensive strategy
- Effective and modern practices for sourcing, screening, assessing, hiring and onboarding new hires
- How talent acquisition impacts various workforce segments (direct hires, contract, hourly)
- Adapting programs and technologies to unique hiring needs and corporate cultures
- Innovative new strategies in talent acquisition



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TM5

## Practitioner Panel: Getting the Biggest Business Bang from Talent and Learning Integration

Aimee George-Leary, *Director, Training Related, Booz Allen*

Linda Heselton, *Vice President, Director of Training, Administrative Services and Finance, KeyCorp*

Marquam Piros, *Senior Director, Global Performance Management & Learning Operations, Seagate Technologies*

Max Meadow, *Director, Strategic Services, Bersin & Associates*

Thursday, 9:15 to 10:30 AM

Over the years, we have steadily beaten the drum about the value of integrated talent management. Learning has always played a central and fundamental role in our model. Learning ensures that succession plans can be executed and that organizational skill gaps can be filled; learning is required for career and leadership development.

In this session, panelists will share best practices and personal experiences for integrating learning with talent management and performance management. They will answer these and other questions:

- What approaches are used for ensuring learning is aligned with the company's broader talent strategy?
- What are key process integration points between learning, succession management, and performance management?
- What is the role of learning for ensuring business strategies are achieved?
- What is the role of the business leader to ensure learning priorities are business aligned?





TM6

### **Practitioner Panel: Fostering Talent Mobility for Maximum Impact**

Eva Majercsik, *Manager, Business & Technical Leadership*, IBM

Neil Neveras, *Global Practice Leader, Leadership Development*, Deloitte

Harold Zagunis, *Chief Risk Officer*, Redwood Trust

Kim Lamoureux, *Principal Analyst and Director of Research*, Bersin & Associates

Thursday, 10:45 to 12:00 PM

One of the biggest success-drivers in enduring organizations is their ability to rapidly and transparently move people from role to role and function to function as business needs change. Talent mobility can only be achieved through a well integrated talent management strategy with strong processes and programs for effective recruiting, career development, and capability development. In this session, panelists will share best practices in recruiting, leadership development, succession management and career management for enabling talent mobility. They will answer these and other questions:

- How do you encourage managers to give up their best talent?
- What is the role of the employee in creating a mobile culture?
- What types of tools and technology are necessary for mobilizing talent?
- How do you ensure that both positions and talent are available at the right time?

TM7

### **Practitioner Panel: Talent Management by the Book**

Marc Effron, *Former VP, Global Talent Management*, Avon

Larry Israelite, *Vice President & Manager, Human Resource Development*, Liberty Mutual Group

Stacey Harris, *Principal Analyst and Director of Research Operations*, Bersin & Associates

Thursday, 1:30 to 2:45 PM

This session will focus on the just-published book, *Talent Management: Strategies for Success from Six Leading Companies*. Both contributors to the book, the panelists will discuss how talent management processes, tools and techniques are used in the organizations highlighted in the book and provide tips on how you can successfully adapt them to your own organization. Discussion will also cover the four critical requirements for a successful talent management strategy identified in the book.



## Applications and Experiences

AE1

### Practitioner Panel: Customer Experiences in Talent Acquisition Systems

Jerod Funke, *Sr. Global Recruitment Director*, Shire Pharmaceuticals

Theresa Valentine, *Recruiting Operations Lead, HR*, Aetna

Jim Wahl, *Talent Acquisition Manager*, 7-Eleven

Madeline Laurano, *Principal Analyst*, Bersin & Associates

Wednesday, 9:15 to 10:30 PM

The talent acquisition technology market is one of dramatic change and innovation. Both during strong and weak economies, investment in talent acquisition systems remains a priority for best-practice companies looking to gain a competitive advantage and secure a solid talent pipeline of both active and passive candidates.

In this session, panelists will share best practices in selecting and implementing in talent acquisition systems. They will address these and other questions:

- What should organizations consider during both a strong and weak economy?
- What should organizations include in their RFPs?
- What are some of the core and advanced features organizations can expect from solution providers?
- What factors should organizations consider when needing global support?
- What are common implementation challenges and how can you avoid them?

AE2

### Case Study: Moving Beyond Engagement to Achieve Strategic Alignment

Tracy J. Edmonds, *Program Director, HR Strategy & Planning*, WellPoint, Inc.

Wednesday, 10:45 to 12:00 PM

With a challenging economy and health care reform on the horizon, the health insurance industry faces major challenges. Those companies with the right strategy, the culture to support it, and engaged associates to execute it have the greatest chance of weathering the storm successfully. But how do you know that strategy, culture, and associate engagement are aligned? This presentation demonstrates how to move beyond measurements of satisfaction to behavior-based engagement and how to align your survey program with your strategy to gain meaningful cultural insights to drive change. WellPoint's ongoing evolution from a traditional to a strategic engagement survey program will be highlighted.

AE3

### Research: Benchmarks & Trends in Corporate Learning and Talent Management

Karen O'Leonard, *Principal Analyst*, Bersin & Associates

Wednesday, 1:30 to 2:45 PM

This presentation will provide detailed metrics and best practices against which organizations can compare their learning and talent management efficiency and effectiveness. Are you spending too much or too little? Do you have the appropriate staffing for your HR and learning functions? Where should you allocate your resources for the greatest impact? This presentation will draw on data from our annual benchmarking studies and will include examples from high-impact organizations. In addition, the session will highlight key trends in learning and talent management that will help organizations shape their strategies for the future.



AE4

### **Practitioner Panel: Customer Experiences in Outsourcing**

Tom Clancy, *Vice President*, Educational Services, EMC  
Julie Holmes, *Training Director*, Reynolds, Smith & Hills  
Jenni Radtke, *Senior Director*, Global Learning Operations, Philips  
Al Johnson, *Principal Advisory Consultant*, Bersin & Associates

Wednesday, 3:00 to 4:15 PM

Over the last year, many organizations have cut budgets and resources in response to economic challenges, while dealing with critical business needs and talent challenges. Research has found that outsourcing various elements of learning and HR functions can help increase both the efficiency, agility, and effectiveness of your organization.

In this session, panelists will share best practices in partnering with outsourcing solution providers and ensuring tangible business benefits from the relationships.

They will answer these and other questions:

- What critical elements should be included in an outsourcing RFP?
- What type of service level agreements are most effective in an outsourcing relationship?
- What type of metrics are most effective when measuring the effectiveness of your outsourcing relationship?
- What types of management processes should be in place?
- How do you ensure that your organization is taking full advantage of your outsourcing relationship?
- What learning and HR functions are most successfully outsourced?

AE5

### **Practitioner Panel: Customer Experiences in Talent Management Systems**

Jamie Parsons, *Vice President, Chief Human Resources Officer*, Mountain States Health Alliance  
Susan Swoboda, *Senior Director Global HR Operations*, Symmetricom  
Madeline Laurano, *Principal Analyst*, Bersin & Associates

Thursday, 9:15 to 10:30 AM

Organizations are finally embracing integrated talent management systems. In this session, participants will address the key challenges and strategic actions in the talent management suites marketplace – and provide real-world insights into the best practices for the selection, implementation and business impact of such systems.

Participants will address these and other questions:

- What is the current state of organizations' talent management systems? What systems do they currently have and how are they pursuing an integrated systems strategy?
- What are the benefits of a talent management suite? How does it help organizations improve business performance, talent development and organizational alignment?
- Given today's HR and systems environment, how does an organization select the right solution?
- What are the business drivers for implementing a talent management suite? How does one cost-justify such a system?
- What are the most prevalent approaches to implementing a talent management suite? What are the best practices for implementation, governance, rollout and change management?



AE6

### **Case Study: Linking Human Capital Management with Business Performance**

Andreas Melcher, *Head of Assessment & Human Capital Metrics, Credit Suisse*

Silvan Winkler, *Assistant Vice President, Human Capital Metrics, Credit Suisse*

Thursday, 10:45 to 12:00 PM

In the financial services industry, employees represent the largest expense item and simultaneously function as the most important competitive differentiator. Therefore, there's much pressure to measure the effectiveness of human capital management and to identify which human factors have the biggest influence on the financial success of the firm. This presentation demonstrates with practical examples the framework and approach to the measurement of human capital that proves to be successful in Credit Suisse. Attendees will learn how metrics are used to help determine human capital investments and brings a new dimension to discussions between HR and business. Credit Suisse research (conducted over four years) into the linkage between employee engagement and financial performance will be a central element of the presentation.

AE7

### **Practitioner Panel: Implementing Informal Learning**

Pam Aigner, *Director of Online Programs, Westinghouse*

Valerie Keesee, *Director, Human Performance, Blue Cross Blue Shield, Michigan*

Pete Premenko, *Director, Brinker Learning Center, Brinker*

Nicole Roy-Tobin, *Chief Learning Officer, Deloitte Financial Advisory Services*

David Mallon, *Principal Analyst, Bersin & Associates*

Thursday, 1:30 to 2:45 PM

The mainstream adoption of new social and collaboration tools, coupled with budget decreases and the need for timely knowledge sharing, is putting a bright spotlight on informal learning. In fact, Bersin & Associates' research finds that a hallmark practice of modern, high-impact learning organizations is the ability to formalize informal learning, thereby creating a rigor and structure around social and on-demand learning. Presenting on this panel are representatives from several organizations that have found practical and effective uses for informal learning and have incorporated different approaches into formal programs. They will share their own experiences and lessons learned for carefully architecting informal activities to ensure positive learning experiences, establishing clear objectives, evaluating success, and blending as appropriate with other major learning programs.