



Management Institute

Strategic HR Leadership Through a Time of Transformation and Change

February 21st-23rd, 2016

Omni Champions Gate, Orlando, FL

Program Agenda



Sunday, February 21st, 2016

11:00 - 1:00 Institute Registration

1:00 - 1:15 Welcome Address and Chairperson's Opening Remarks

1:15 - 2:00 HR Transformation: Ricoh Americas' Story of Success



Donna Venable, SVP of HR, Ricoh

With technology and the world around us evolving at a rapid pace, delivering what the customer desires and achieving business growth may require a refreshed focus and, in some cases, organizational change. Once your company has committed to transformation, what does this mean for you and your HR team?

This session will share the strategic role the HR team continues to play as part of Ricoh Americas' transformation from a product-centric company to a services-led organization. During Ricoh's transformation, HR helped support and drive the company's cultural change and constantly provided a measure of stability.

But when was the right time for the HR team to make its own transformation and ensure they were positioned effectively to continue supporting employees? Ricoh's HR2020 initiative will demonstrate how and when the timing is right for HR to make their move.

After this session, attendees will be able to:

- Position their HR team for success to support organizational change
- Develop an organizational design which shifts from the traditional model to one that is more focused on specialist's roles
- Implement new technology that empowers all employees and managers to readily find what they need, when they need it
- Identify how simplifying HR processes for the business, improving the employee experience, and building stronger partnerships throughout the organization impacts employee engagement

2:00 – 2:45 Eliminating Engagement Barriers to Drive Better Results



Jack Morehouse, COO, Executive VP, Perceptyx

We have all heard how many "actively disengaged" employees there are in the workforce. Despite years of companies trying to drive engagement, the number of disengaged workers hasn't changed much, if at all. Why is it that most employee engagement programs don't show results? Employees want to be heard; they want to be valued and they want to make a difference. Employers want – in fact, need – productive, engaged workers. Perhaps there is a different way to think about employee engagement.

In this session we will share a transformational approach to employee engagement that actually works. These



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simple and effective methods can yield engagement and performance improvements broadly across the organization. In this session, we will cover:

- The key link between engagement, performance and success (both personal and business)
- The single most important...and often overlooked...element in employee surveys
- The most common mistakes companies make before, during and after an employee survey and how to avoid them

2:45 – 3:30

HR Solutions Showcase: Meeting Common HR Challenges



Chris Bjorling, President & CEO, Fidello Training Technologies
Anne Fulton, CEO, Career Engagement Group
Lindsay Stanton, Chief Client Officer, DigiMe

The HR Solutions Showcase is designed to provide attendees with insight and information on cutting edge technologies and solutions to help improve the performance of their organizations. The following solutions will be presented.

Chris Bjorling, President and CEO of Fidello will discuss a unique approach to providing a customized S.A.A.S model for talent management and its components. He will discuss:

- In meeting your needs, the “one size fits all” concept may not work so then what?
- Your culture, your processes, your strategic vision can be all be supported and enabled within your timeline your budget

Anne Fulton, CEO of Career Engagement Group will showcase how organizations are achieving engagement uplift through providing compelling career path propositions and strengthening their EVP with customized career propositions. In this session you will learn:

- The three best practice principles to deliver an engagement uplift in your organization
- How to deliver a customized career proposition to all your employees in a simple, visible and scalable manner
- How it can be easy to provide career pathways to all staff
- How to support your managers to have powerful, effective career conversations with their people
- Learn how other organizations have achieved an engagement uplift within 12 months

Lindsay Stanton, Chief Client Officer at Digi-Me, will discuss strategies to overcome various recruiting challenges:

- Recruiting challenges: brand recognition, candidate engagement, quality applicants, and time to hire
- Job seekers are social and mobile
- Reach niche talent pools through social media and a viral spread
- Employee referral programs that save time and money
- Real life case studies from recent clients

3:30 – 5:00

Business Meetings



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5:00 – 5:45 Developing a Culture of Leaders



Steve King, VP, Talent and Leadership Effectiveness, Allstate Insurance Company

“Culture eats strategy for breakfast”. All organizations have their own culture based on shared beliefs, history, values and behaviors. One of the major challenges facing HR leaders today, when building an organization based on leadership is culture.

Join Greg Burns, SVP of HR for Allstate Insurance Company, as he discusses why Allstate recently redefined what it means to be a leader. You will learn about Allstate’s new Leadership Principles, developed in partnership with employees from every level and every area of the company, and built on the belief that every Allstater, not just managers or directors, are leaders. You will also find out how Allstate’s multi-faceted approach, is bringing Leadership Principles to life in record time.

This session will consider the following:

- What does it mean to be a leader?
- Understanding culture: challenges and opportunities
- Leading by example
- Leadership principles and strategies to support a leading organization

5:45 – 6:45 Managing Talent in a Time of Transformation and Change: A Panel Discussion



Tiffany Morrison, VP, Talent Management & HR Business Partner, Sears Holding Corporation
Christopher Henry, VP, Talent and Change Management, Sutter Health
Stephanie Neuvirth, VP Talent, Mars Pet North America, Mars, Inc.
Jeff Lupinacci, VP, Talent, Sally Beauty
Harry Glantz, VP HR, RailWorks



For many organizations responding to today’s fluctuating and sometimes unstable market forces, the rate of change can be overwhelming. Organizing effective change management strategies and solutions can be a daunting process however; it is also now recognized by leading organizations as a critical business tool linked to superior financial results.

This session will investigate effective methods of integrating one of your most precious assets into your change management strategy, your talent. Join us as we hear from three leading experts on how they are managing change in their organizations.

6:45 – 10:00 Cocktails & Dinner



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Monday, February 22nd, 2016

7:30 – 8:15 Breakfast

8:15 – 9:15 Diversity and Inclusion: Leveraging ERG's as Strategic Agents of Change



Moderator: Shirley Engelmier, CEO, Inclusion Inc.
Andres Gonzalez, VP, Chief Diversity Officer, Froedtert & Medical College of Wisconsin
Elizabeth Morrison, Global Director, Diversity & Inclusion, Campbell Soup Company
Grady Crosby, VP, Public Affairs and Chief Diversity Officer, Johnson Controls
Rosanna Durruthy, Chief Diversity Officer, Cigna



Effective Employee Resource Groups (ERGs) are driving performance and making real business impact in many leading organizations today. As our esteemed panel of diversity and inclusion experts explain, ERGs are delivering value to organizations in a multitude of areas, including talent acquisition and management, engagement, retention, productivity and performance.

Join Shirley, Andre and Elizabeth as they discuss the power of ERGs and how they can work to change your organization for the better.

- What is an ERG?
 - How do ERG's today go beyond affinity specific dimensions?
- How do I properly structure my ERG for best results?
- How do I continually evolve my ERGs to increase employee engagement and business value?
- Qualitative and Quantitative results seen from ERG's
 - Improved employee health and wellbeing
 - Improved employee engagement=Increased productivity=Increased profits

9:15 – 10:00 Changing Demands for HR Leaders: HR's Critical Role in the Future Organization



John Schwarz, Co-Founder & CEO, Visier

More than ever before the business world needs strong HR leaders. The workforce in the developed world and China is rapidly aging. New first-time workers are barely replacing workers who are retiring. And, despite increasing automation, in the next 20 years there will be a serious shortage of skilled workforce everywhere.

It is commonly understood that companies with Workforce Intelligence capabilities outperform their peers in quality of hire, retention, and leadership capabilities. Yet recent research by Harvard Business Review and Harris Poll has found a large gap between what companies expect from HR -- data-driven insight and action -- and the capabilities that are necessary to deliver it.

In this session, John Schwarz, CEO of Visier, the leading innovator in Workforce Intelligence, will discuss:

- The results of these recent studies
- The path HR leaders can take to deliver data-driven strategic value to the business



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9:15 – 10:00 The Future Workforce: Are You Prepared?



Jennifer Nation, Regional Director, National Accounts, Keller Center for Corporate Learning of DeVry University

Technology. Globalization. Aging Workforce. Acquisitions and Mergers. New Career Standards. Young Leaders with Little Experience. These external forces are the current challenges facing HR and continue to reshape many organizations' most-sought-after need: Top Talent.

Organizations are fiercely competing to hire the BEST of the BEST and maintain their existing "Top Talent". They are also looking for ways to increase employee engagement and tenure. By offering training and development to their future leaders, through tuition assistance organizations are finding that their "Top Talent" are staying and employees are feeling more empowered and engaged.

The workforce and workplace have changed and organizations must be prepared and fully equipped to adapt to this constant evolution. Successful organizations have a clear path to upward mobility, and are prepared for the future workplace and workforce.

Learn how to prepare the future workforce when recruiting and developing your potential TOP leaders:

- Global Recruiting – Looking at talent on a wider scale and learning their cultures and values
- Adaptability – Leaders in today's workforce must be nimble to adapt to the future workforce
- Training Leaders – High potentials for the future
- Redesign Your Employees' Profiles – Across the board

There are many seismic changes reshaping our workforce and workplace. Does your organization appreciate the power of having the best talent? Discover how leading organizations have mastered the future workforce and workplace through recruitment, leadership development and ongoing education.

10:00 – 12:00 Business Meetings

12:00 – 1:00 Networking Lunch

1:00 – 1:45 Taking on the Challenges of HR Management in the Age of Globalization



Gary Cunningham, Global Head of HR, Oerlikon Balzers Coating

With global markets rising and falling in "the blink of an eye", emerging markets can be especially tough to navigate from a global HR perspective. Nonetheless, HR still has to deliver on a harmonized People Agenda that provide sustainable business value. Learn what this Swiss-based, global market leader does to align its culture around the world in the 34 markets it operates to provide value added People Solutions.



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- The “Red Ribbon”
- Building a community of practice
- One HR vision & ‘the way forward’

1:00 – 1:45 Transitioning to a Shared Services Model



Girish Ganesan, VP & Global Human Resources Client Services Head, Manulife Financial

Efficiency, cost savings and quality improvement, these are all components of a thriving organization and also some of the many benefits of implementing a shared services model. The shared services model had been increasing in popularity across mid-sized and large organizations over the years. Deloitte Consulting’s 2011 Global Shared Services Survey Results show an 11% increase in shared service centers since 2009.

Join Girish Ganesan, VP & Global Human Resources Client Services Head of Manulife Financial as he discusses his recent experience transition to a shared services model as well as some of the results seen.

- Why consider shared services?
- How to realize and sustain the vision of shared services?
- Manulife’s story: Translating enterprise strategy into specific of shared services objectives and goals

1:45 – 2:30 Where We’re Going We Don’t Need Roads: The Transformation of the Workforce through Artificial Intelligence



Bruce Morton, Global Head of Innovation, Allegis Global Solutions

Robotics is one of the fastest-growing industries in the world and not just in factories. It has been estimated that by 2025, half of the jobs in the United States will be performed by brilliant machines and intelligent systems. Digital Machines are the next major innovation to transform the workplace. We are living through a key moment in the evolution of how work will be perceived in the future – the second machine age. The following session will look at some of these innovations and discuss:

- How artificial intelligence is changing the world of work and how to be prepared for it
- How your company may use artificial intelligence to improve its decision making
- What may be the true value of artificial intelligence?



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1:45 – 2:30 You're LEAVING? You Just Got Here! Why it's Not Just About Acquiring the "Best Talent"



Mike Bollinger, Global AVP, Thought Leadership & Advisory Services, Cornerstone

5% of employees make the decision on their first day to look for another job. If a new hire leaves within the first year, are you due your money back? Onboarding is more than insuring that employees fill out their paperwork, understand their role and meet their manager. On boarding is a continuation of the talent acquisition process that you worked so hard to attract your candidate with, as matter of fact, the same techniques can be made for any type of "transition" an employee has. These moments are periods of acute vulnerability, because employees lack established working relationships and a detailed understanding of their new role. Each employee is on a "journey" and it is up to us to make that something each employee values as unique. Learn how to reinforce the talent brand, how to predict success early on, how to accelerate the time to productivity and how to insure that your new employee comes "on board" motivated, excited and ready to contribute.

- Understand the high risk period for an employee and why it matters
- Learn to create brand continuity from attraction to retention
- Use techniques to bring employees on faster, more productively and with a higher level of satisfaction throughout the organization
- Understand how to create an environment where the employee has less anxiety, and feels immediately a part of the team
- Learn how to set organizational expectations for success
- Discover why on boarding techniques apply to more than just the "new hire"
- Know what an Employee Experience Journey Map is and how to create one

2:30 – 2:45 Afternoon Break

2:45 – 4:45 Business Meetings

4:45 – 5:30 Using the Wellbeing Framework to Achieve Employee Engagement and Decreased Costs



Julie McGovern, VP, HR, Anne Arundel Medical Center

Many organizations work hard to improve employee engagement with little success. Nationally the percentage of engaged employees has remained stagnant for almost 30 years. The roadmap to improve engagement exists, but for many organizations the road map has not resulted in higher engagement scores. By focusing on wellbeing, you can improve engagement. The data shows employees with high wellbeing are 12 times more engaged than their counterparts who are struggling with wellbeing.

- What is the link between wellbeing and engagement?
- How do you use the wellbeing framework to guide human resource initiatives?
- What do leaders do to support wellbeing?
- How do you measure wellbeing and how does wellbeing impact the bottom line?



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4:45 – 5:30 Strategic HR Business Partner Model: Delivering Strategic Value to the Organization in 90 Days



Len Carter, VP HR, FHN

Moving a good Human Resources team away from transactional and tactical based services into a strategic model can be intimidating, cause frustration and create additional costs if not done correctly. In July 2011, the FHN Human Resources function moved to a strategic based model built around the Strategic HR Business Partner and Center of Excellence concept. But why- HR was already a respected unit of the organization- why take the risk? In a 90 day timeframe, the HR completed a massive research, design and transformation built around four essential items:

- Off-load low level services: Automate transactional work and redesign or eliminate non-essential activities
- Refocus HRD's Vision: HRDs Roles, the HRD structure and the HRD Strategy Statement were redesigned to meet the future needs of the organization, without losing the "personal touch"
- Assume a proactive posture and Instill an HR-Business Unit Integration: In this new model HR Business Partners (HRBPs) partner with Directors to advance the department and organizational goals to achieve better business outcomes
- Formulate a Center of Expertise: The new model utilizes the highly specialized skill sets of HR professionals in the areas of recruitment, benefits, compensation, data analysis, resource identification, organizational development and learning. This concept is designed to provide proactive solutions to organizational demands

5:30 – 6:15 Talent Acquisition: Attracting the Next Generation of Workers



Obed Louissaint, VP, HR, IBM Watson, Watson Health, Research, Technical Talent & Corporate Functions, IBM

Recruiting and managing the best talent for your organization can be challenging, especially if that talent is generationally different than what has been considered the norm. Younger workers have different expectations than earlier generations of workers and employers must be able to adapt to ensure they stay current with the employees and company leaders of tomorrow.

Join Obed Louissaint, VP of HR at IBM as he explains some of the new and innovative methods IBM is using to attract a younger generation of top talent. From interview scavenger hunts to Hollywood effects immersion rooms, it appears as though this is "no longer your grandfathers IBM" but a much younger and more hip place to work and grow your career.

- The best recruiting tools to leverage
- Maximizing on the benefits of social media tools- Facebook, LinkedIn, Twitter, College/University media hubs
- Hiring the right employee (regardless of age)
- Leveraging progressive and effective internship programs
- Finding the talent that fits your culture
- Next generation management strategies
- Rewards and Recognition

6:15 – 7:00 Free Time

7:00 – 10:00 Cocktails & Dinner



Tuesday, February 22nd, 2016

7:30 – 8:15 Breakfast

8:15 – 9:15 HR Best Practices: Roundtables



Jon Canger, VP Global Talent Management, Marriott Vacations Worldwide
Rick Merritt, Chief HR Officer, OSI Systems, Inc.

This interactive roundtable style session is designed to provide attendees the opportunity to “huddle up” and talk through issues surrounding their top priorities, with an eye to uncovering best practices. Attendees will have the opportunity to select one of the following discussion groups in order to dive deeper into the topic, ask questions and to discuss with their peers their opinions and strategies employed.

Global Talent Management

Discussion Facilitated by: Jon Canger, VP Global Talent Management, Marriott Vacations Worldwide

Performance Based Engagement

Discussion Facilitated by: Rick Merritt, Chief HR Officer, OSI Systems, Inc.

9:15 – 10:15 Business Meetings

10:15 – 11:00 HR Due Diligence in the Face of Mergers & Acquisitions: The Creation of a New Corporate Culture



Valerie Blanchett, VP HR, Cargill, Inc.

For organizations involved in a merger or acquisition, creating a new company culture can either be the driver of success for the deal or the beginning of a dire cultural misalignment. In a recent survey, HR Leaders ranked organizational culture differences and human capital integration issues as the two most significant challenges faced by respondents in recent transactions.

This session will consider the following:

- How will the company culture change?
- What will the new organizational structure look like?
- How will HR manage the talent of the new organization?
- What steps will be taken to ensure effective cultural integration?



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11:00 – 11:45 No Labels: Driving an Ownership Culture with Performance Management and Doing Away With the Performance Review



Kim Stepanski, VP, HR, Pfizer

After decades of frustrating and fruitless performance management processes, companies are looking for innovative ways to make managing performance more impactful. An increasing trend in this arena is the elimination of performance ratings. This session will be a discussion of one company's journey to eliminate performance ratings – from decision through implementation and sustainability – as key steps in building an ownership culture.

- Ensuring the link between culture and talent strategy
- What are some of the key considerations when making the decision to eliminate ratings (i.e., it's not right for everyone)
- What's the impact of eliminating performance ratings on other HR processes (e.g., compensation, promotion, etc.)
- How does the corporate decision to eliminate ratings 'play out' in a specific division?
- What's the role of leadership in ensuring successful implementation and sustainability?

11:45 – 12:00 Closing Remarks

12:00 – 1:00 Closing Lunch