

# **The Center for Talent Reporting**

## **2016 Conference**

### **Detailed Conference Agenda**

#### **Dallas, TX**

**February 24<sup>th</sup> — 25<sup>th</sup>, 2016**



**Driving Business Results Through Better  
Human Capital Management**

# Welcome to the Center For Talent Reporting Conference

Dallas, TX



The Center for Talent Reporting (CTR) was formed in October 2012 as a 501c6 not-for-profit organization. Our mission is to *develop and promote the adoption of reporting standards for human capital that meet the needs of senior executives, talent management leaders, program managers, and other stakeholders*. It is our vision that *Talent Development Reporting principles are broadly accepted and widely employed as the world-class reporting standard for all human capital processes*. Funding comes from memberships and our founding sponsors.

Governance is provided by a nine-member board of directors, including a Standards Committee, and an Advisory Council. Members have access to a measures library (with over 600 measures), more than 60 sample statements and reports in excel, and detailed guidance on implementing TDRp. Click to find out more [about us](#), [sponsorship opportunities](#) and [membership](#).

## Conference Goals

Our goal is to increase your knowledge and understanding of the measurement, reporting, and management of human capital with a focus on learning and development. The conference will ensure you are up to speed on the latest trends in the field as well as future directions. And we'll make sure you can answer the key questions facing our profession. It is also our goal to connect you with the thought leaders and leading practitioners in our field and to provide rich networking opportunities.

### Learning Objectives

1. Increase your knowledge of measurement and reporting
2. Improve your ability to manage human capital
3. Increase your knowledge of TDRp
4. Increase your business and financial acumen
5. Understand talent analytics and big data, and their relationship to measurement
6. Learn what CEOs and senior leaders are really looking for

February 23<sup>rd</sup>

### Reception Tuesday 5.30 – 7.00 pm, Game Room

Join your colleagues to relax and connect after an afternoon of travel. Following the reception you may choose to visit one of the restaurants in Grapevine for dinner or grab something in the onsite cafeteria.

February 24<sup>th</sup>

Wednesday 8.00 – 8.15 am, Room TBA

**Welcome**

Dave Vance, Executive Director, Center for Talent Reporting

Join Dave as he welcomes conference participants and reviews the agenda. He will also introduce the Center for Talent Reporting Board of Directors and the Advisory Council members, all of whom will be participating as speakers or panelists. He will also introduce the other speakers and panelists so you can more easily interact with all the speakers and panelists throughout the conference. He will encourage all participants to take advantage of the intimate nature of our conference to ask lots of questions and interact with presenters and panelists. They are here for you.

Wednesday 8.15 – 8.45 am, Room TBA

**Opening Remarks: Our Opportunity to Make a Difference**

Dave Vance, Executive Director, Center for Talent Reporting

The cover article in the June 2015 issue of *Harvard Business Review* calls for “blowing up HR.” In 2005, *Fast Company* magazine ran an article about why everyone hated HR. Apparently not much has changed in the last ten years. Why do people feel this way and why hasn’t it improved? How much of this applies to us in the human capital development field? And what can and should we do about it?

In his opening remarks Dave will address these questions and suggest that we have a tremendous opportunity to make a difference and to make a very significant positive contribution to our organizations and to society. Over the past 40 years the roles of physical capital and human capital have been completely reversed – an astounding change over a very short period of time. Our ways of thinking, and our systems for measurement, reporting, and management have not caught up. Join Dave to see why now is such an extraordinary time to be in the business of human capital development.

**Keynote** Wednesday 8:45-9:30 am, Room TBA

## **The State of Measurement in Talent: Current Trends and Future Directions**

Cushing Anderson, Program Vice President, IDC

The state of measurement in learning and development is falling behind other areas of the business. CLOs are often asked to demonstrate the value of training. But most aren't satisfied with the tools, resources or data available to them to properly establish training's impact. In fact, about three out of four enterprises use general training output data (courses, students, hours of training, etc.) to help show the impact training. And measurement of stakeholder and learner satisfaction with training programs is only completed about 60% of the time. Even as organizations increasingly leveraging analytics as a business decision making tool, fully 80% of CLOs report their learning and development measurement programs need to be better.

In this presentation, Cushing will describe the state of measurement in talent and learning programs (based on just released data from January 2016), examine recent trends, and suggest a possible future for measurement in talent development. Attendees will have an opportunity to contribute to this presentation by completing a survey of their "state of measurement" prior to the conference. That information will be shared during the presentation and compared to a broader population of CLOs and HR leader responses. Come to see how you compare and where the profession is headed.

Cushing Anderson is Program Vice President for IDC's Project-Based Services research. In this role, Mr. Anderson is responsible for managing the research agenda, field research, and custom research projects for IDC's Business Consulting, Human Resources and Learning research programs. He was named as one of the "Top 20 people to watch in corporate training, 2003" by Lifelong Learning Market He is on the editorial advisory board and writes a regular column for the industry magazine CLO - Chief Learning Officer and is on the board of the Center for Talent Reporting

Session 1A Wednesday 10-11 am, Room TBA

## **Introduction to Talent Development Reporting principles (TDRp): What Is It and How Can It Help You?**

Peggy Parskey, Assistant Director, Center for Talent Reporting

Our profession lacks standard terminology and processes, especially for the measurement, reporting and management of human capital. Moreover, we don't speak the language of business or communicate effectively with senior leaders so is it really all that surprising why we struggle for resources and why we are the first to be cut in a downturn?

Join Peggy in this session to learn how an industry-wide effort to address these issues resulted in the creation of Talent Development Reporting principles. TDRp defines standard names for terms, provides a framework for measurement and reporting, and brings standard management principles to our field. She will introduce the three recommended types of measures and reports, and discuss how you can use these to better manage your programs and entire department. This session is designed for those new to TDRp and presumes no previous knowledge.

In this session you will learn

- How TDRp provides industry standards for measurement, reporting, and management of human capital
- The three types of measures every organization should be employing
- The difference between measures you should manage and monitor
- The three types of reports you should be generating and how you should use them to get better results

Peggy is consultant with over 25 years of experience in driving strategic change to improve organizational and individual performance. In addition to her role at CTR, she is a part-time member the Advisory Services team with Metrics that Matter, CEB and has her own consulting clients focusing on strategy development and management of change.

Session 1B Wednesday 10-11 am, Room TBA

## **Building a Business Case for Your Program: What Elements Must You Include?**

Jeff Higgins, CEO, Human Capital Management Institute (HCMI)

We are often disappointed that our programs are not funded and that senior leaders do not share our enthusiasm for them. How many times have you made what you believed to be a very convincing presentation only to have leaders pick it apart or ask a lot of seemingly irrelevant questions? After a few of these you may be left wondering, “What exactly are senior leaders looking for and how can I communicate the value of my program in a way they will understand?”

Join Jeff in this session to learn what senior leaders really are looking for and how you can put together a presentation that will convincingly address their concerns. Jeff served as CFO of a (*what type*) company and had the opportunity to hear many presentations from HR asking for resources. While sympathetic to HR, he found many of these presentations sadly unconvincing which resulted in the denial of their budget requests. The business case portion of the presentation was often especially weak or lacking entirely. Jeff will share the CFO’s perspective and outline the essential elements that must be included if you are going to be successful.

In this session you will learn

- The five elements senior leaders want to see in a presentation for resources
- How to put together a convincing business case
- The importance of confidence and presentation style

Jeff has served in both the CFO and senior HR executive roles so he brings a very unique perspective to this topic. He is also a founding member of the PwC Saratoga Institute advisory council on metrics. He serves as treasurer for the Center for Talent Reporting board of directors.

Session 1C Wednesday 10 – 11 am, Room TBA

## **Measurement, Evaluation, and Analytics: A Balance Between the Perfectly Precise and the Roughly Reasonable**

Patti Phillips, President & CEO, ROI Institute, Inc.

Are you looking for perfect measurement? Does your impact or ROI have to be without error before you present it? Do you let the desire for precision get in the way of progress? Only if you are a carpenter bee whose natural instinct is to drill the most precise, perfectly round holes in your back deck, will you accomplish absolute precision every time. Sometimes you have to balance the desire for perfect with the reality that the reasonable is good enough.

Join Patti as she describes how to conduct measurement using statistically precise and roughly reasonable methods. Engage in exercises that will provide food for thought as you decide which techniques are most suitable for you. Learn what it takes to ensure your data are credible, reliable, and precise enough to influence decisions in your organization.

In this session you will learn

- Techniques that measure the perfectly precise and roughly reasonable
- Why reasonable is often good enough
- How to increase the reliability of estimates
- Considerations when deciding to go with the perfectly precise or the roughly reasonable

Patti is co-author of the books *Handbook of Training Evaluation and Measurement Methods* 4th edition (Routledge, 2016), *High Impact Human Capital Strategy* (AMACOM 2015), and *Making Human Capital Analytics Work* (McGraw-Hill, 2015). She serves on the Center for Talent Reporting Board of Directors.



Wednesday 11.15 – 12.00 noon, Room TBA

## **Five + Disruptive Ideas: Panel Discussion with Industry Thought Leaders**

Kevin Oakes, CEO, i4cp

Laurie Bassi, CEO, McBassi & Company

Jean Martin, Solutions Architect, CEB

Jac Fitz-enz, CEO, Human Capital Source

Cushing Anderson, Program Vice President, IDC

Moderated by Kevin Jones, Director Research, Center for Talent Reporting

What should be keeping you awake at night? Or, if not awake at night, at least on your mind during the day? Join Kevin Jones and our esteemed panel as they suggest and discuss five ideas which have the potential to fundamentally change the way we think about our work and the future of our field. At the end of the session, Kevin will solicit contributions from the audience. The audience member with the most disruptive idea wins a free pass to a TDRp workshop or next year's conference so come prepared!

Lunch follows immediately after the panel, and you will an opportunity to continue the discussion by sitting at the thought leader's table.

Session 2A Wednesday 1-2:00 pm, Room TBA

## The Future of Corporate Learning

Kendall Kerekes, Senior Vice President, CEB

Peggy Parskey, Assistant Director, Center for Talent Reporting

The Learning & Development function is at a critical crossroads. Research shows that L&D functions capture only 20% of the ‘market’ for learning in their organizations and industry watchers project that this share could continue to decline given the shift in how people learn. Employees have nearly unlimited access to content, expertise and non-formal development opportunities both internally and externally. They rely less and less on the learning function for access to relevant learning content or even to develop the skills needed for success. These shifts demand that the Talent function adapt to a new reality both in terms of its role in the organization and its ability to measure the effectiveness of these learning methods to build the workforce of the future. In this session, you will learn how L&D functions are changing their focus and the implications for measuring the value of L&D in a rapidly changing world.

Kendall brings over 15 years of Talent Management/Measurement Executive experience to her position as Senior Vice President for CEB’s Analytics and Advisory Services. Kendall also serves on the Center for Talent Reporting Advisory Council.

Peggy is consultant with over 25 years of experience in driving strategic change to improve organizational and individual performance. In addition to her role at CTR, she is a part-time member the Advisory Services team with Metrics that Matter, CEB and has her own consulting clients focusing on strategy development and management of change.

Session 2B Wednesday 1 - 2 pm, Room TBA

## Running L&D and HR like a Business to Deliver Measurable Results

Dave Vance, Executive Director, Center for Talent Reporting

Jeff Carpenter, CEO, Caveo Learning

Many in L&D and HR simply lack the knowledge of how to run their programs or departments with business discipline and consequently don't have as much impact as they might. Senior leaders, seeing this lack of business discipline, are often reluctant to provide additional funding since they are not convinced it will be well spent. This is actually not surprising. Where would L&D and HR professionals have learned it? Most university programs with undergraduate or even graduate degrees in the field do not offer even a single course in managing the function. And since so few leaders in the field manage this way, there are few opportunities to learn it on the job.

Join Dave and Jeff in this session to learn how to apply standard management principles to L&D and HR. They will argue that we should be held to the same standards as our colleagues in other departments in the company who are expected to produce a business plan (or case) with specific, measurable goals, and once approved the plan should be executed with discipline to come as close as possible to achieving the agreed-upon plan. And, since many of our programs should support the organization's goals, they will also address the very important issue of strategic alignment.

In this session you will learn

- How to achieve and demonstrate strategic alignment to the organization's goals
- How to create a plan with specific, measurable goals
- How to execute that plan with discipline each month to deliver the planned results

Dave is the author of *The Business of Learning: How to Manage Corporate Training to Improve Your Bottom Line*. He was formerly the Chief Economist for Caterpillar and President of Caterpillar University.

Jeff is a Principle at Caveo Learning. He is also a member of the center for Talent Reporting Advisory Council.

Session 2C Wednesday 1-2 pm, Room TBA

## HR Analytics: What, Why, How, and So What?

Laurie Bassi, CEO, McBassi & Company

Analytics is all the rage right now. Could you define what is meant by analytics? Is it different than the measurement activity you already are doing? If so, how and why would you add people or budget to do it? And if you did devote more effort to it, what could you expect from it?

Join Laurie in her session on analytics to get answers to these questions and more. These are actually very serious questions which every participant in our conference should be able to answer. We have all seen organizations (over)invest in the latest “new thing” only to be disappointed later. Laurie will help you sort all this out so you can develop an analytics strategy that is right for your organization.

In this session you will learn

- How analytics is defined and how it may differ from what you are doing today
- How analytics can be used to identify opportunities, test assumptions, and clarify results
- How analytics fits into the TDRp framework

Laurie is the author of the *HR Analytics Handbook*, and she has helped numerous companies address these issues. She is also Chair of the Center for Talent Reporting Board of Directors.

Session 3A Wednesday 2.15 – 3.15 pm, Room TBA

## How to become a Strategic Business Partner: Three Important Steps

Carrie Beckstrom, VP of Learning, ADP

Claudia Rodriguez, VP of Devices Product Management, Motorola Solutions

Dave Vance, Executive Director, Center for Talent Reporting

We hear all the time that we should become strategic business partners. What does that mean and why would we want to do it? How would it help us be more effective? What would we have to do differently? And what are the implications for our own career progression?

Join Carrie, Claudia and Dave in this session to discuss what it means to be a strategic business partner at both the business unit or division level and at the enterprise level. Each will share their own experiences and lessons learned. They will suggest three important steps you can take to transform your relationship as well as some current behaviors you will need to discontinue. They will end by discussing how becoming more strategic can enhance your career and promotion opportunities.

In this session you will learn

- What it means to be a strategic business partner
- The three steps you will need to take and several current behaviors you will need to discontinue
- What it may mean for your future if you succeed

Carrie has worked in the field of learning and development for over 25 years. She is currently VP of Learning at ADP. She is also Secretary of the Center for Talent Reporting board of directors.

Claudia is VP of Devices Product Management at Motorola Solutions. She responsible for optimizing product portfolio planning and investment decisions. She is also a member of the Center for talent Reporting board of directors.

Dave is the author of *The Business of Learning: How to Manage Corporate Training to Improve Your Bottom Line*. He was formerly the Chief Economist for Caterpillar and President of Caterpillar University.

Session 3B Wednesday 2.15 – 3.15 pm, Room TBA

## Capturing Returns on Informal Learning

Jean Martin, Talent Solutions Architect, CEB

Kendall Kerekes, Senior Vice President, CEB

The prevalence of unstructured learning opportunities presents both enormous opportunity and enormous challenge for the L&D profession. As employees become more self-directed in their education and they leverage the vast archive of technology-enabled learning options on their own time as well as at work, L&D must redesign how it works with employees and business leaders to ensure learning is productive.

Join Jean Martin to hear the latest findings in how L&D is redesigning itself to build a “culture of productive learning” and to understand how measurement is evolving to make sure that informal learning benefits are captured.

In this session you will learn:

- Ways in which informal learning trends are changing the role of Learning & Development
- Emerging Best Practices for Measuring Informal Learning Impact
- Recommendations for how to ensure your organization is well-positioned to leverage informal learning to drive business performance

Jean Martin serves as the Talent Solutions Architect at CEB, overseeing product and insight development in CEB’s Talent Management and Human Resources businesses. Jean has more than 15 years’ experience providing C-suite executives with leading-edge insights in performance management, leadership development, learning, and organization management.

Kendall brings over 15 years of Talent Management/Measurement Executive experience to her position as Senior Vice President for CEB’s Analytics and Advisory Services. Kendall also serves on the Center for Talent Reporting Advisory Council.

Session 3C Wednesday 2.15 – 3.15 pm, Room TBA

## **Improve Your Financial Acumen: What do You Really Need to Know?**

Jeff Higgins, CEO, Human Capital Management Institute (HCMI)

How many VPs of Training or SVPs of HR become CEOs? (Virtually none) How many move out of HR to head other divisions or business units? (Very few) Have you ever wondered why? Are learning and HR leaders somehow inherently inferior to their colleagues in other departments like sales, manufacturing and finance? (No) Or are we simply missing something? (Yes – financial acumen) And what are senior leaders looking for when they promote HR professionals to director or department head positions? (Financial acumen would be a plus)

Join Jeff in this session to learn how important financial acumen is to your success and its essential elements. The good news is that you do not need an MBA or even a couple of courses in accounting or finance. You don't need to know financial ratios or very much about accounting. You do, however, need a very basic understanding of financial statements. You need to speak the language of business and have a business mentality. And you need to understand how senior leaders think. Jeff will lay all this out for you so you know what is required for success.

In this session you will learn

- What senior leaders look for in up and coming leaders in terms of financial acumen
- The essential elements of financial acumen including the
- Language of business
- Basics of financial statements
- How senior leaders think
- What is HR most afraid to talk about?

Jeff has served in both the CFO and senior HR executive roles so he brings a very unique perspective to this topic. He is also a founding member of the PwC Saratoga Institute advisory council on metrics. He serves as treasurer for the Center for Talent Reporting board of directors.

Session 4A Wednesday 3.45 pm, Room TBA

## The 10 Metrics That Matter Most in Online Learning

Laura Rexford, Director, Client Loyalty & Measurement, Skillsoft

Metrics can enable L&D leaders to both influence and serve key stakeholders. Metrics can also be confusing, frustrating, and even a little frightening. Gaining clarity of the metrics that matter most when building your complete value “story” for investments in online learning will not only help you demonstrate success, but will make the journey less stressful.

In this session, Laura will share the most common and useful metrics from nearly 20 years of studying client practices related to online learning. She will share specific metrics recommended for digital and/or blended learning programs, as well as bring forward examples from a global customer base illustrating successful use of the data.

In this session you will learn:

- The value of providing complete metrics to describe impact of online learning investments.
- The 10 metrics that matter most.
- The role and purpose of each metric.
- How to translate the metrics into a “story” stakeholders will care about.

Laura collaborates with clients and Skillsoft account teams from all across the globe influence positive results in the areas of stakeholder engagement, alignment to business goals, adoption of online learning on the organizational level, and demonstrating value of investments in digital learning



Session 4B Wednesday 3.45 – 4.45 pm, Room TBA

## **Kirkpatrick, Phillips, Analytics, and TDRp: How Do They All Fit Together?**

Dave Vance, Executive Director, Center for Talent Reporting.

Peggy Parskey, Assistant Director, Center for Talent Reporting

The Kirkpatrick and Phillips approaches to evaluation have been around for some time. Analytics is the current rage and now we have TDRp. Could you explain to someone how these four relate to each other? Are they complementary or at odds with each other? Which have a place in your measurement, reporting or management strategies?

Join Dave for what we hope will be a lively discussion late Wednesday afternoon on this topic. He will share his view and invite the audience to share theirs as well. He will begin by comparing and contrasting the Kirkpatrick and Phillips approaches to evaluation and then talk about their place in the TDRp framework. Next he will talk about analytics and how that relates to evaluation and to TDRp. Finally he will suggest a model tying all four together. Join the session to see if you agree. You might not or you might have a better framework. In any case, everyone will leave with a better understanding of the contribution of each and how they relate to each other.

In this session we will discuss

- The differences between the Kirkpatrick and Phillips approaches to evaluation and the strengths of each
- Where each is reflected in the TDRp framework
- What analytics adds to our toolbox and its touchpoints to traditional evaluation approaches and to TDRp.
- How all four fit together

Dave is the author of *The Business of Learning: How to Manage Corporate Training to Improve Your Bottom Line*. He was formerly the Chief Economist for Caterpillar and President of Caterpillar University.

Peggy is consultant with over 25 years of experience in driving strategic change to improve organizational and individual performance. In addition to her role at CTR, she is a part-time member the Advisory Services team with Metrics that Matter, CEB and has her own consulting clients focusing on strategy development and management of change.

## Reception Wednesday 5.30 – 6.30 pm, Room TBA

Join us to discuss and reflect on the day's activities in a casual atmosphere. Afterwards make plans to visit one of the many restaurants in nearby Grapevine or get a quick bite to eat in the cafeteria.

The quaint town of Grapevine is only 2.5 miles away with traditional Texas cuisine as well as Italian, French, Mexican, Southwestern, and Pacific Rim restaurants. There are three golf courses nearby: the Bear Creek Golf Course, the Cowboys Golf Club, and the Grapevine Golf Course. For those who love shopping, Grapevine has plenty of local shops as well as an Abercrombie and Fitch Outlet, Historic Downtown Shops, a Farmers Market, and the Grapevine Towne Center shops which offer more than 20 different stores. Local Transportation is provided by the hotel within a five-mile radius. (Contact the hotel Transportation Desk by calling **972-453-0600** or visit the desk located in the hotel lobby.)

Dallas is 28 minutes away by taxi. Learn more about the Hotel and Conference Center [here](#). To learn more about the town of Grapevine click [here](#).

February 25<sup>th</sup>

Welcome Thursday 8.00 – 8.05 am, Room TBA

Keynote Thursday 8.05 – 8.45 am, Room TBA

## **Running Training Like A Business: What It Means and Why You Should Do It**

Edward Trolley, Consulting & Advisory Services, NIIT

How does training close the gap between hard-edged business issues and training solutions that will make a measurable impact? The answer can be found in an approach called “Running Training Like A Business”. This approach ensures that your training can and will deliver clear business value to your organization. In this session, author Edward Trolley will make the business case and then share with you a five-step process for transforming traditional training organizations into training enterprises capable of delivering unmistakable value.

In this session, you will learn:

- How to make T&D a full strategic partner in business decision-making
  - How running training like a business helps the organization realize the strategic value of training
  - How to transform your current training capability into a well run “training business”.
- Edward will also share his thoughts on learning transformation and the mandate for all of us to dramatically improve the effectiveness and efficiency of training.

Edward Trolley is Senior Vice President of Consulting and Advisory Services for NIIT. He is widely recognized for having started the training outsourcing industry when he orchestrated the first comprehensive training outsourcing deal between DuPont and The Forum Corporation in 1993. In his last role, he was head of DuPont’s Training and Education where he oversaw and guided the training and education for the 110,000-person multi-national corporation.

Mr. Trolley is co-author of the book, *Running Training Like A Business: Delivering Unmistakable Value*.

Session 5A Thursday 9 – 10 am, Room TBA

## Creating a Measurement Strategy: What Are the Key Elements?

Dave Vance, Executive Director, Center for Talent Reporting

Have you have been tasked with pulling together a measurement strategy for your department or taking a fresh look at your existing strategy? Do you know where to start? What types of measures should you include? How many? Who should you involve? What questions should you be asking of others? What do you do with the measures once you have them?

Join Dave in this session to get answers to these questions and more. We know a lot of you have been given exactly this assignment and we want to help you craft the best measurement strategy possible for your department. Talent Development Reporting principles (TDRp) provides specific guidance about the types and number of measures you should choose. Moreover, Dave will discuss the importance of starting with a management strategy before crafting your measurement strategy so you can start with the end in mind. He will also focus on the critical distinction between measures to manage and measures to monitor. He will also share the most commonly used measures. Bring your existing measures and leave with confirmation that you already have the right measures or ideas for different measures which may serve you better.

In this session you will learn

- The importance of starting with a management strategy which addresses how the measures will be used and by whom
- The three types of measures you should include
- The optimum number of measures, and the difference between measures to manage and measures to monitor
- How to report the measures

Dave is the author of *The Business of Learning: How to Manage Corporate Training to Improve Your Bottom Line*. He was formerly the Chief Economist for Caterpillar and President of Caterpillar University which won numerous awards for its measurement strategy.

Session 5B Thursday 9.00 am, Room TBA

## Center for Talent Reporting's 2nd Annual Review of the TDRp Technology Market

Kevin Jones, Director of Research, Center for Talent Reporting

From the C-Suite to Wall Street, talent has emerged as a key source of competitive advantage. Internally, CHROs are increasingly challenged to measure and report on their organizations ability to acquire, develop, retain and promote talent that drives business performance but they are struggling to get at the underlying data. The emergence of Talent Suites coupled with industry focus on Big Data and Predictive Analytics, is driving vendors to improve their reporting solutions but the lag in adoption and lack of clarity as to customer needs are key constraints to success.

Join Kevin as he presents CTR's second annual evaluation of the TDRp technology market. Kevin will provide an overview of the different types of tools available today, together with advice to organizations looking at options to automate the measurement and presentation of Talent metrics. Kevin will also provide his thought provoking insights on the longer term future of the market based on lessons gleamed from his research of the evolution of financial and sustainability reporting, as well as the emergence of integrated reporting. This session is designed for those new to TDRp and presumes no previous knowledge.

In this session you will learn

- Demand side of the Talent Analytics Market: what are we asking from our software vendors? Where are we on the road to maturity? Who are the leading lights?
- Supply side response from the HR Software market: how are vendors responding? What is the current maturity of their offerings? Who are the vendors to watch? Which vendors are meeting the demands of TDRp?
- Long Game: what does the future hold? Will the emerging war for talent drive investors and regulators towards more standardization of talent and development reporting?

Kevin is a Chartered Accountant, an experienced HR professional, and was a founding contributor to the development of TDRp. In addition to his role as Director of Research for the CTR, he is managing partner of Flint & Jones Associates LLC.

Session 5C Thursday 9-10 am, Room TBA

## How to Sustain your TDRp Initiative

Peggy Parskey, Assistant Director, Center for Talent Reporting

After the brass bands and fireworks of your TDRp launch have faded away, you are faced with the reality of life in organizations, sustaining your momentum and making TDRp the 'way work gets done.' How do you do that when the organization is continually reorganized, priorities shift, resources get realigned and the urgent pushes out the important?

Join Peggy for this session to get tips and techniques on managing the change and keeping the momentum of your TDRp Initiative alive. Peggy will present a model for driving change along with the critical success factors for sustained focus on the principles, process and practices of TDRp. This session is designed for individuals who have prior experience with TDRp.

In this session you will learn

- How to gain clarity on TDRp success indicators and create a shared vision of the benefits of TDRp
- How to integrate TDRp into HR and business planning process
- The Role of the Department Head and how to handle inevitable changes in leadership
- Approaches to shift the focus from purely measurement to management of the Talent function

Peggy is consultant with over 25 years of experience in driving strategic change to improve organizational and individual performance. In addition to her role at CTR, she is a part-time member the Advisory Services team with Metrics that Matter, CEB and has her own consulting clients focusing on strategy development and management of change.

Session 6A Thursday 10:15-11:15 am, Room TBA

## **Implementation Tips and Techniques: Stories from the Front Lines**

Peggy Parskey, Assistant Director, Center for Talent Reporting

You've learned the TDRp theory and approach, you're excited to move forward, but you feel like an unlicensed driver and uncertain where you are going. You are probably wondering, "Others have gone through this journey, can't I just learn from them?" The answer is, "Of course!"

Join Peggy for a panel discussion of TDRp implementation tips and techniques. Peggy will query the panelists to reveal the secrets of their success, what's worked and what hasn't, obstacles encountered and how they have overcome them. This session is designed for individuals who have attended a TDRp workshop or webinar and want to learn more about implementation.

In this session you will learn

- Implementation success factors
- Creative approaches for getting organizational buy-in
- Common obstacles and which are most critical to address
- Approaches for adapting the TDRp process to your culture

Peggy is consultant with over 25 years of experience in driving strategic change to improve organizational and individual performance. In addition to her role at CTR, she is a part-time member the Advisory Services team with Metrics that Matter, CEB and has her own consulting clients focusing on strategy development and management of change.

Session 6B Thursday 10.15 – 11.15 am, Room TBA

## Reaching Agreement with Sponsors on Outcome Measures

Dave Vance, Executive Director, Center for Talent Reporting.

Practitioners tell us this is one of the most difficult aspects of implementing TDRp or running learning like a business. Most in our profession have never had these kinds of discussions with senior leaders before and consequently lack the knowledge and facilitation skills to feel confident. And yet this is one of the most important steps you can take, especially if you strive to become a highly-valued strategic business partner.

Join Dave as he walks you through the process including asking for the appointment, facilitating the discussion, and reaching agreement on both the outcome measures and the accompanying roles and responsibilities required to deliver the agreed-upon impact. He will explain that the plan for a specific outcome (like a 20% contribution to the sales goal or a low impact on achieving the engagement goal) is much less important than the process. The value is really in building the relationship and identifying what the sponsor must do in terms of making resources available and reinforcing the learning.

In this session you will learn

- How to plan and facilitate the meeting
- What preparation is required on your part (not as much as you might think!)
- How to reach agreement and how to proceed if you cannot reach agreement
- How to help the sponsor understand their important role in the learning's success
- How to create a list of roles and responsibilities for both of you
- How to follow up monthly with the sponsor

Dave is the author of *The Business of Learning: How to Manage Corporate Training to Improve Your Bottom Line*. He was formerly the Chief Economist for Caterpillar and President of Caterpillar University.



Lessons Learned on the Journey Thursday 11.30 – 11.55 am, Room TBA

### **Lessons Learned on the Journey**

Dave Vance, Executive Director, Center for Talent Reporting

Peggy Parskey, Assistant Director, Center for Talent Reporting

Dave and Peggy will share the lessons they have learned on the TDRp journey over the last five years and provide useful advice for anyone seeking to improve their measurement, reporting and management of human capital.

Wrap up and Drawing for I-Pad Thursday 11.55 – 12.00 pm, Room TBA

### **Wrap up and Drawing for I-Pad**

Dave Vance, Executive Director, Center for Talent Reporting

Stay till the end of the conference for your chance to win an I-Pad.

During registration, you will automatically be entered to win. The only restriction is that you must be present to win.