

Spring Symposium: The HR Leader's Toolkit WORKBOOK

Thursday 15 May 2014 Clothworkers' Hall, Dunster Court, Mincing Lane, London, EC3R 7AH

Spring Symposium: The HR Leader's Toolkit

CORPORATE RESEARCH FORUM

Our annual Spring Symposium has become an established date in the CRF calendar and we are delighted you are able to join us for this year's event which, once again, will be an immersive, participative and challenging day. The format continues to be interactive and focused and we feel sure that you will find it worthwhile and stimulating.

Looking to gain exposure to leading-edge management thinking and keen to develop their networks with other like-minded professionals, our attendees will be those who are building a successful HR career and recognise the need for continuous learning and improvement.

This Workbook provides you with full details of the symposium and suggests some ways of getting the best out of the event. You will also be able to add your own thoughts and ideas as the day unfolds. Do continue to use the Workbook in the coming weeks, as you follow up on actions you set yourself, to ensure that this is not just a single day activity but the start of a continuum which will help you develop a broader range of management and leadership skills for the future.



WELCOME

Today's HR professionals – tomorrow's HR leaders – need a forum which facilitates interactive debate around topical issues and provides opportunities for longer-term networking. In collaboration with our Partners, we believe this intensive, stimulating and enjoyable day will provide genuine personal development for all attendees. We are delighted that you are here with us and are confident that our presentations and your networking will enable you to focus on some key issues, share ideas, make new contacts and leave the Symposium better prepared to recognise, and take advantage of, the range of challenges you will meet in your careers.

The requirements placed on modern organisations and its leaders are substantial. We are confronted with short-term demands, heightened employee expectations and evermore complex and competitive markets. With the global and UK economies recovering from recession and with real indicators of sustainable growth, business competitiveness is going to be vital to all types of organisations looking to take advantage of an improved environment. Individual opportunities will also present themselves and today will provide opportunities to get up to speed in a number of areas which will undoubtedly be useful in the coming years.

Have fun and enjoy!

Agenda

8:30	REGISTRATION	
9:00	Welcome, Introductions, Briefing & Table Discussion	
9:30	 Setting the Scene HR leadership - The next generation Functional and organisational leadership skills set What do business leaders want from their HR leaders? HR leading the business - what does it take? 	Karen Ward Deborah Baker Kath Durrant
9:55	The Future of HRWhere have we come from?Where are we going?How will we get there?	Deloitte
10:25	 The HR Leaders Toolkit - preparing the case Identifying the need Selecting and procuring The business case The personal case 	Ceridian
10:55	COFFEE & NETWORKING	
11:15 - 12:00 & 12:15 - 13:00	 Clinics run by expert presenters Three clinics running simultaneously twice (delegates pick two from three) Recruiting, Resourcing and Assessment Training, Learning and Development Technology, Big Data and HR Capability 	Talent Q GoodPractice IBM
13:00	LUNCH	
13:45	 Case study - "The Emerging Organisation" Draws out half a dozen tools Experts table hopping Three table presentations 	
15:00	 Evaluation of Toolkit What have we learnt? What have we missed? Evaluation of investment - personally, organisationally General discussion with presenters, Q&A 	Kath Durrant, Deborah Baker, Karen Ward & expert presenters
16:00	Keynote address - Teams & Teaming	Amy Edmondson, Harvard Business School
17:00	DRINKS & CANAPÉS	

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Chairing Our Symposium

We are delighted to welcome Deborah Baker and Kath Durrant who will jointly chair and facilitate our Symposium. Both are highly-regarded senior HR Directors with experience over a wide range of business sectors. They will ensure that our day retains its structure and openness and provide every opportunity for participants to become involved.

Both will work with you in addressing the issues which arise throughout the Symposium and will help in framing questions for our speakers and panel. They are looking forward to talking with you during the day on issues arising from the presentations or on matters which are prompted by the views of speakers and fellow attendees.

Do ensure you take the opportunity to speak with them.

Deborah Baker

Deborah Baker is the Director for People at BSkyB, the UK and Ireland's leading entertainment and communications company. Starting her career at Ford Motor Company she moved to Schlumberger, Grand Metropolitan and then into retailing. Before joining Sky she was SVP of HR for Burberry worldwide. Deborah has spent her career in the HR function covering every aspect of the people agenda. She has a particular interest in driving value and insight through the HR function.



Kath Durrant

Kath Durrant is Group Director of Human Resources at Rolls-Royce Plc. She was previously VP, HR & Communications for the Research and Development division of pharmaceutical company AstraZeneca and has held senior positions with GUS and GlaxoSmithKline. She started her career at the London Stock Exchange and has a degree in History from Lancaster University, now sitting as an Advisory Board member for the University Management School.

Symposium Faculty

In addition to Deborah and Kath, we are delighted to be joined by our faculty of experts and are grateful for their participation. They will be around all day so please do take the opportunity to pick their brains on issues with which they will be happy to help.

The Symposium

With over 100 HR participants attending from a wide range of CRF member companies, our Symposium is an ideal opportunity to discover what other organisations and HR teams are up to. Entitled the 'HR Leaders Toolkit', the Symposium is divided into a number of parts facilitating regular discussion amongst attendees and presenters. Each element is explored in a different format looking at issues which our CRF members tell us are important and relevant to successful leadership. It is a day to think about how you approach these concepts on a professional basis, how you build on them moving forward and how you make the best use of them. You should expect to leave with some answers and also, more importantly, a variety of questions to ask when you return to your organisation.

You are not alone

Please **don't feel diffident or inhibited** during the Symposium. We hope all attendees will attend with the same **positive mindset**, determined to **contribute fully** to a challenging and stretching day. It would be all too easy to sit back and not contribute but **success depends on everyone taking part.** Everyone will feel slightly nervous but don't worry about it; talk with your neighbours, introduce yourself to strangers and speak with the presenters. There are plenty of **breaks for networking**; do use them by welcoming questions and conversations with fellow attendees and initiating introductions as often as you can.

Prepare and build

We hope you will **prepare** for the day by taking a look at this workbook and the list of attendees. We also **hope that you will be a thoughtful participant and contributor**. We are structuring the Symposium in a way that will naturally lead to you **staying in touch** with other attendees and building a number of networks around common areas or people who you find of particular interest. It is down to you to **go away and build** on the Symposium, assessing the contents of the day and the discussions with fellow attendees and the **issues you are facing** in your organisation.

Connect

Building your network is an important part of developing your career in HR. With plenty of opportunity for you to have discussions with fellow attendees around points raised throughout the day, there are also opportunities for you to continue conversations after the event.

Our **Corporate Research Forum LinkedIn Group** is a great way to connect with those you meet today and will provide you with the opportunity to start and participate in discussions on the members' page.

You can also follow CRF on Twitter at **@C_R_Forum**. The hashtag **#CRFSpring** has been specifically set up for the event to capture comments on a live Twitter feed throughout the day.

Feedback

Do let us know your views on the day. We will be sending you a brief feedback form to complete and it will help us in our planning of future symposia if you let us know the good and the not so good.

Providing leadership and guidance to create a synchronised, harmonious and effective organisation Begin using your workbook by jotting down thoughts raised by the points opposite, nothing extensive and strictly for your own use. A word or two noted down about an idea you have, somebody you want to meet or something you want to raise with our presenters during the day will help you get the most out of the Symposium and provide an invaluable checklist when you review in the future.

What We Would Like from You

The Symposium is a full day which will require stamina, concentration and a willingness to participate. We know that you will be looking forward to the day and here are a few tips to help you get the most out of it.

Relax

Make the most of the magnificent interior of Clothworker's Hall, its architecture, paintings and memorabilia (do take a few minutes o look round). We shall be **businesslike but informal** and, therefore, you might like to dress accordingly.

Get involved

We have a full day but presentations are interspersed with table discussions, activities and several refreshment breaks. Make the **best use of time** and, if you don't manage to raise your issues in the room, **seek out the people** you agree with, disagree with or just find interesting. If all else fails, make contact after the Symposium with an email, phone call or via our available social media channels. **It is up to you to shape the ambience and spirit of the day** and determine the benefits which flow from it.

This is for you, so switch off

Please don't spend the many breaks catching up on emails and calls - they will wait, an opportunity missed to meet someone new or discuss a particular point is gone forever. However, we would encourage you to tweet during the day, sharing your views for the benefit of all. This is for you, a rare day out to be a bit selfish and do something for yourself - **make the most of it**.

See the day through

We have a **long day** in front of us but do **stay with us** - and you will be rewarded with a drink or two with which to wind down. This will also be your last chance to nail down those final introductions or go back to the interesting people you met this morning. **It is surprising how enjoyable this is with a drink in hand!**

Stay in touch

An important part of the day is **networking** and we hope many of the **connections** you make will be **long term** - this won't happen unless you work at it but **one thing is certain, successful leaders are well networked**. We cannot over emphasise the value and importance of this and, once established, **networks have to be maintained** - for mutual benefit.



Jot down thoughts, names and numbers and take a few minutes to think about how you can contribute to the day, projects you have been managing and problems you have faced. Everyone will be interested in at least some of things you and your organisation have been dealing with.



Setting the Scene - HR Leadership, the Next Generation

Before considering the HR Leader's Toolkit, some context is required in terms of understanding the job to be done. We set the scene with a discussion around what will be required of future HR leaders in terms of:

- Functional and organisational leadership skill sets
 how do they differ and how do they impact on the business?
- What do business leaders want from their HR leaders
- HR leading the business what does it take functionally and personally?

The end is nigh. Or so you might think if you believed recent studies on the future of HR. Critical reviews abound and the headlines are made from CEOs asking whether they need HR at all. In this session we shall explore the issues of HR leadership in light of these critical voices. What does it take to be an effective HR leader in 2014? We will hear from two leading HR Directors about how they see the health of their profession and we will explore what it takes to be an effective HR leader.

We will look at the different aspects of leadership which need developing throughout your career how to lead yourself and others; how to lead a function within an organisation and how to be a senior leader at an organisational level. Recent research and experience have demonstrated that effective HR Leadership requires strong role modelling and the courage to speak truth to power and that many HR functions are found wanting in both these areas. Today's event will provide the opportunity for you to consider what your leadership challenge might be.

This session will enable you to clarify your views on the future role of HR leaders and begin to think about your own skill set viewed against the likely requirements in years to come.

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Karen Ward

Karen is the Programme Director for the Corporate Research Forum. Karen has previous consulting experience at Ashridge; Bath Consultancy Group; Bridge and Talent Psychology. Karen was a Senior Civil Servant working on developing strategic change capability in the UK public sector and has held senior leadership roles within organisations in the global pharmaceutical and financial services sectors. She began her career with PA Consulting Group. She has lived in Nigeria, USA, Germany and UK and worked globally for over 24 years.



So What Does the Future Look Like?

Having set the scene in terms of the elements of HR Leadership we will now look at the context in which HR leaders might well be operating in the future. Our lineage can be traced over the last 50 years or so but with the rapid and continuous rate of change in the economy, the business world and society at large, our ability to adapt will be the determining factor of our future. Mark Bowden of Deloitte will share with us the latest trends in HR and his view of the future.

"The war for talent is over, and talent won" - Josh Bersin

HR functions have been through transformation since the mid-1990s and the majority of those organisations moved to a structure based on David Ulrich's Business Partner supported by HR technology. As the challenges facing HR change we are seeing organisations beginning to ask 'What next?'. Cost remains important but HR leaders are being asked to show the value HR brings to the business, how does it contribute to the bottom line?

Deloitte will present the latest trends in Human Resources and introduce a view as to how HR functions will develop in 2014 to deliver greater impact for organisations.

Most developed economies are emerging from recession and years of austerity, due to the improving economic environment 2014 will be a year where highly-skilled people will start to exert control in the talent debate. People will want meaningful and rewarding work with top performers demanding career growth and mid-level staff striving for development.

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Mark Bowden

Mark Bowden is a Director in the HR Advisory team in the People & Programmes practice. He has six years consulting experience and 14 years HR experience. Mark is an HR professional and has advised HR Directors in a range of private sector clients across the full remit of HR. Mark is the current Management Consulting Association HR Consultant of Year; Mark was awarded this for his work on transforming two multinational companies, bringing an innovative and new approach to HR transformation.

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The HR Toolkit - What do you need?

Identifying the need for and procuring a new HR tool - be it on behalf of your organisation or for personal development - requires a disciplined approach and a process of evaluating costs and benefits. In this session, Nick Laird and Shaun Dunphy, of Ceridian will take a look at what might be available to HR functions and their leaders and how decisions regarding preparing a procurement business case might be informed.

Few changes occur in a business today without a "business case"; especially those expenditures that are seen as discretionary. Whether you want to invest in a new product, opening up business in a new country, or updating a supporting process or technology you need to identify clearly and quantify what the benefits are for your company.

This session will have a look at where value can lie in an organisation and it will give some hints about the places you can go and look for value. We'll also get you thinking about how a business case gets signed off, as well as why. We hope to give you some "hot words" to be on the lookout for, and we'll share some real examples of business cases accepted by boards for HR technology and process change and how they were realised.

In terms of personal development you need to develop your own process which identifies a need, is successfully implemented and, crucially, evaluates outcomes. Are you getting what you thought and does it deliver in adding to your personal toolkit?

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Nick Laird

Nick joined Ceridian in 2010 as Chief Commercial Officer, responsible for commercial strategy, marketing and sales. Nick has overseen huge growth at Ceridian with 2013 and 2012 the best in Ceridian's history.

Nick started his career at Ford Motor Company in finance, sales and then marketing roles; moving on to be operations and commercial director with Cellular Operations, a telecommunications business that he helped grow and sell to Vodafone. Prior to Ceridian, Nick was a director of TMM, a private equity company. A graduate of Oxford University, where he studied engineering, Nick also undertook an MBA at INSEAD business school in France.



Shaun Dunphy

Shaun has over 25 years' experience in the HR and payroll industry in various roles including consultancy roles at PA Consulting, Alsbridge, Fujitsu and Atos. Shaun joined Ceridian as a Principal Consultant in 2012 where he works with Ceridian clients and prospects to shape and design solutions including the people, process and technology. He specialises in shared service design, process design and re-engineering, cost and resource modelling and outsourcing.



Symposium Clinics

Our Symposium Clinics, facilitated by CRF Partners, will run during the second half of the morning. There are three clinics and each will run twice for 45 minutes. You will be able to attend two out of the three. Therefore, it is up to you to decide which you will attend, with the only restriction being on numbers.

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Recruiting, Resourcing and Assessment

The Court Room 11.15 and 12.15



Training, Learning and Development The Livery Hall (Main Room) 11.15 and 12.15



Technology, Big Data and HR Capability The Court Luncheon Room

Recruiting, Resourcing and Assessment

Presented by Dr. Richard A. Mackinnon, TalentQ

In this presentation, Richard will explore the value of psychometric assessment in the context of organisational change. Many organisations fail to capitalise and leverage the data they collect when assessing applicants and employees. This is particularly true during times of organisational change - when it is needed more than ever. Richard will summarise recent trends in assessment and illustrate how effective assessment can add significant value to both selection and development of talent, particularly in the context of organisational change.

The session will highlight how data collected through psychometric assessment can inform multiple talent management activities concurrently, representing a 'win' for HR professionals and their clients. Core themes to be covered include:

- The relevance of personality assessment in organisation change contexts
- Aligning "what good looks like" with strategy and the context of the organisation
- The use of "aspirational profiles" in working through organisational changes
- The use of validation studies to gather evidence to support theories re personality/ability
- The value of objectivity during the upheaval of change

Richard will use a recent client case study to illustrate how appropriate use of employee assessments supported significant business realignment, developing planning, succession planning and external recruitment.

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Dr. Richard A. MacKinnon CPsychol CSci AFBPsS

Head of Learning and Development Solutions

Richard leads the development and deployment of Talent Q's Learning and Development offering. This includes training in the use of our assessment products, broader assessment skills and more general development interventions.

Richard's consultancy activity is primarily in the development space, focusing on the identification of high potential employees and the design of workshops and training to better focus development interventions. Richard's recent clients include: Carlsberg, Virgin Atlantic, Lloyds Banking Group, Jersey Telecom and London Ambulance Service.

Prior to joining Talent Q, Richard was a consultant at Kenexa, where he specialised in the measurement of employee engagement, interpretation of employee survey data and identification of organisational change priorities based on this data.

Richard began his career as an internal consultant at Royal Mail Group, conducting research into topics as varied as organisational change, training evaluation and employee satisfaction.



Training, Learning and Development

Presented by Owen Ferguson, Good Practice

Supporting managers through organisational evolution and change

For over a decade, GoodPractice has been conducting research into the learning habits of managers. Rather than lean on conventional wisdom, Owen and his team have conducted in depth interviews, collaborated with the polling company ComRes on surveys, observed managers and leaders at work and analysed vast set of data collected from online support platforms.

After 14 years of studies into the people management issues that managers find most challenging, how they learn away from the classroom and what resources support them best, GoodPractice have a unique and powerful insight into how to support managers through organisational, development and change.

In this session, Owen will share the most valuable insights from his team's research and what this means to HR departments and their future leaders embarking on an organisational journey.

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Owen Ferguson

Owen Ferguson is Product Development Director for GoodPractice, a company devoted to supporting leaders and managers in the workplace.

Owen started his career in L&D as an internal consultant, and later manager, with a number of FTSE 100 companies. Seeing the growing potential in learning technologies, he joined GoodPractice eight years ago and currently leads its product development team.

Passionate about performance improvement, Owen and his team use data, user-centred design and experimentation to develop and refine online solutions to real-world problems. Owen is a Fellow of the Learning and Performance Institute.



Technology, Big Data and HR Capability

Presented by Dave Millner, IBM

This session will cover the following aspects:

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- The impact that technology is having upon the changing role of HR
- The future role of technology as an 'expert adviser to line managers' and what this means for the HR practitioner of the future
- The changing emphasis that the collection and analysis of big data will have upon HR roles as the desire to create more of an evidenced based HR function continues to gather momentum
- The future capabilities needed in HR and what our data says about the readiness of HR for those capabilities

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Dave Millner

Consulting Director, Workforce Science, IBM Smarter Workforce, EMEA

With over 25 years consulting experience working with global clients on performance and organisational development demands, Dave's focus is to ensure that organisations are able to both unify their talent practices and also maximise the benefits that integrated people practices can provide.

Dave is responsible for IBM's HR Institute which supports HR functions in becoming more commercially focused, more responsive and more cost-effective by providing HR practitioners with appropriate thinking processes, models and broad knowledge that can be applied in assisting the transformation of HR practices.

Case Study - The Emerging Organisation

Our case study has been developed in conjunction with our partners as a way of raising a number of issues and learning points which you should identify and discuss, thinking about the consequences and possible actions.

Debating the situation at Provincial Mutual with colleagues around your table will also, hopefully, bring to mind similar issues which you have experienced within your own organisations and allow you to draw parallels and share your experiences with fellow participants. We are looking to use the case study as a learning vehicle to explore the issues raised and to work through any number of possible outcomes based on your group's collective knowledge and experience. However, remember that the title of this symposium - 'The HR Leader's Toolkit' and carry out your analysis of the case always thinking about the tools you might need to deal with issues you identify.

Work through the case study collectively to ensure that you:

- identify as many issues as possible
- consider the implications and possible solutions
- share similar examples from your own experiences
- prepare observations and questions to share in the panel session
- think about 'best fit' solutions
- identify issues of particular relevance to you, which you may want to take away and use.

Panel members and our Symposium Chairmen look forward to joining in your table discussions, therefore make use of their expertise and ensure you extract as much as you can from the case study and the time available.

After lunch, Deborah Baker and Kath Durrant will facilitate a Q&A session with our Panel, inviting you to share your thoughts, make observations and put your questions. We believe that the case study is broad enough to generate wide debate on a range of issues. So, be rigorous in your analysis of Provincial Mutual's problems and imaginative in your observations and questions, perhaps bearing in mind earlier sessions.

Case Study - Provincial Mutual

Provincial Mutual is a long established, FTSE 250 financial services company enjoying a period of sustained growth. However, there are challenges and opportunities ahead with sustained economic recovery, further competition and more stringent regulation.

Following several years of underperformance, Provincial Mutual is now enjoying a period of sustained growth as an upper quartile performer as measured against its sector peers. Offering a range of financial services and investment products, the company aims at the 50+ age group of high net earners and pensioners. With a strategy of transparent low cost management fees, strict regulatory compliance and low to moderate investment risk, the company is now performing well following the economically austere market of the last decade.

A new CEO was appointed recently and you have now joined the company as Main Board Director for People, Property and Technology with a remit to ensure that the assets in each of these areas are capable of delivering the target 30% growth in business in the next three years whilst continuing to provide the outstanding customer services which clients demand. The growth target is predicated on a range of new products designed to take advantage of the economic upturn and targeting a new market of young professionals requiring the need for financial planning and services for the first time.

Looking round your own senior team you have doubts about the abilities of a number of key post holders in terms of technical ability, commercial acumen and leadership skills in being able to raise their game from the 'steady as she goes' organisational era to the more demanding expansionist environment of the future. Clearly the three areas of responsibility are interconnected with a property portfolio of well-staffed largely high-street branches all linked to head office by adequate but limited transactional IT systems. The online market is currently a significant, but by industry standards, relatively small proportion of overall business.

However, the key to the future success of Provincial Mutual is its people. There is a need to identify and empower leaders at all levels of the organisation and in all disciplines to ensure that the Board's vision for the future is delivered, accepted and implemented. The company is also going to need to recruit in a number of specialist areas such as marketing, compliance and technology, demonstrating that it is a forward looking well led employer offering opportunity, creating and rewarding careers to those willing to join and enhance the current organisational capabilities of sound but unexceptional financial services skills. You and your main board colleagues are having a strategy weekend in a month's time, the first such event you have attended, when you will be presenting for discussion your plans for People, Property and Technology over the ensuing five years. In terms of people, but having due regard for your other responsibilities, how will you prepare for the strategy discussions such that you create the best opportunity of establishing yourself as an accepted and trusted colleague, leading value adding activities aligned to the overall business success of Provincial Mutual?

Evaluation of Toolkit and Symposium Review

Deborah Baker and Kath Durrant will spend some time with you reviewing the case study and invite your views on how you could respond. Our presenters will also contribute as we broaden the discussion into a symposium review. You will want to reflect on the value of the day to you personally and the learning points you will be taking away of benefit to your organisations.



This is your opportunity to develop issues you have thought about during the day with our faculty and to share with other delegates helpful experiences and problems overcome.

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Amy C. Edmondson is the Novartis Professor of Leadership and Management at Harvard Business School

The Novartis Chair was established to enable the study of human interactions that led to the creation of successful business enterprises for the betterment of society. Professor Edmondson teaches MBA and Executive Education courses in leadership, team effectiveness, and organisational learning, and a doctoral course in field research methods.

Keynote Speaker

This is a rare opportunity to debate issues with a globally-recognised expert - seize the moment!

Our keynote speaker, Amy Edmondson, will introduce attendees to the notion of teaming - a verb as contrasted with team - a noun.

Amy will draw on examples of teaming from her academic and consultancy work and will develop the concept as an integral element of the HR Leader's toolkit as organisations become much more fluid and project oriented with teams forming and reforming on an almost continuous basis. Leadership in this environment is not the same as managing a series of repetitive, discrete activities in a steady state unchanging world.

As your leadership journey progresses, teaming becomes evermore crucial to successful outcomes as fresh challenges arise and unintended consequences have to be managed on the fly. Understanding and being able to lead in the ambiguous and complex circumstances of fast-moving organisations will be a vital tool for successful HR leaders.

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Leave better equipped to contribute to the high performance of your organisation

Partners



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Battlefields to Boardrooms

MANAGING DIRECTING LEADING

6th Annual International Conference: 30th September - 2nd October 2014, Berlin

The CRF International Conference has become an established date in the diaries of senior executives who focus on the way people add value to their organisations.

With an audience of 300+ senior business leaders, our Berlin conference will use the catastrophic (for all sides) Battle of the Somme as an opening case study and will seek to explore the importance of intelligence gathering, decision making, planning, strategy and motivation in the twin contexts of the military imperatives of 1914 and the business imperatives of 2014. Chaired by **Rt. Hon Dame Tessa Jowell DBE MP**, our expert faculty will include:

- Stephen Bungay, Director, Ashridge Strategic Management Centre
- Stephen Carver, Lecturer in Project and Programme Management, Cranfield University
- Dr. Tomas Chamorro-Premuzic, Professor of Business Psychology, University College London
- Murray Steele, Strategy Consultant, Businessman and Academic

CRF members qualify for two places as part of their annual membership. Attendance for non-members costs £1,500 + VAT (excluding flights and accommodation).

For further information please visit www.crforum.co.uk or contact Lynn Little at lynn@crforum.co.uk or 020 7470 7104 to reserve your place.



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