

# crf

CORPORATE RESEARCH FORUM

MADRID

INTERNATIONAL CONFERENCE

# AGILITY 2.0

BUILDING ADAPTABLE ORGANISATIONS

2023 RETROSPECTIVE

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**KEYNOTE SESSIONS**

Overall Conference Takeaways

Agile Strategising

Agility 2.0 Needs Workforce 2.0

Organising for Agility

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How to Make an Elephant Run

Leading Through the Fog

From Adversity to Agility

Agility in Action

**FOREWORD**



Agility 2.0 is the key to having the speed and flexibility to respond to the market and an adaptable workforce. This year's Conference focused on this, with the concept of agility woven into the content from both a personal and organisational perspective.

Agility can be defined as both attitude and ability. Agility is a multi-dimensional concept, which starts with individual agility and flows into organisational agility. The importance of embracing agility, and role modelling this as a leader, is essential if you want agility to become an embedded organisational capability. We need to build our own agility before we can build it in others; we need to put our own oxygen masks in place before we help others.

The process of building agility starts with building an agile strategy, ensuring that the strategy itself is not rigid and has slack and flexibility built in, creating the ability to pivot as circumstances change.

The concept of experimentation is critical, as well as the safety to be able to fail. Agility does not mean we will get it all right the first time. It means we can pick ourselves up, reassess and restart. Becoming comfortable with discomfort and slowing down to speed up are part of the mindset we need to adopt.

But we know that this doesn't come easily. At Mercer, we believe sustainable agility requires significant shifts to embed agility as an organisational capability. The first lever to create agility is building a skills-powered organisation that can adapt, evolve and change based on the fluctuations in the market. This skills agility will enable the organisation to pivot and make sure it can happen at speed. The second lever is building an exceptional employee experience that leverages workforce technology to make us work smarter, and ensures that the technology does not become the blocker to a great employee experience. We see technology as an enabler to ensure agility, allowing employees to spend their time on value adding activities.

Developing a skills powered organisation requires a new work operating system that supports organisational agility and talent fluidity. Key principles to getting this work operating model right

include: starting with the work, achieving the optimal combination of humans and automation, considering all the options of work engagement – e.g. gigs, freelance, and projects – and allowing talent to 'flow' to work. As skills maturity develops, we see companies shifting from fixed roles to more flexible and task-based constructs. Our research shows a sustainable approach for skills involves aligning to business strategy, but also ensuring the vision and case for skills resonates with employees, line managers, HR and wider stakeholders. There are many challenges of implementing skills-based practices in organisations, so we encourage you to stay connected with the people you met at this conference and share your experiences along the way.

The HR function has a unique opportunity to take the lead on the digital employee experience. In recent research, we found that 60% of organisations were either dissatisfied or very dissatisfied with the return on investment from HR technology spending. We are now moving beyond the technology transition to digital transformation of the employee experience. This should be a space where employees have more personalised experiences, line managers can see people analytics to help their decision making and technology is helping teams come together and maximising each and every person's skills. Now is the time to get a return on investment of this technology. By taking a strategic approach to HR technology, we can revolutionise human resources processes, ensure agility and improve employee engagement for our people.

So, as you are planning for 2024 and beyond, there are three questions we should all be asking:

- 1 How are we building an organisation powered by skills to drive organisational agility?
- 2 How works gets done?
- 3 How can we get better return on investment from HR technology, create greater speed and agility and deliver a best-in-class digital employee experience?

Remember agility starts with you. Challenge yourself to reflect on your own mindset, think about your old voice and find your new voice. From there, you will be in a strong position to build the organisation agility, with your own oxygen mask in place.

Wishing you all the best with your journeys.

**Maura Jarvis**, Partner Workforce Transformation  
**Paul Habgood**, Partner Global Skills Subject Matter Lead



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# Agility 2.0: Building Adaptable Organisations

## 2023 RETROSPECTIVE INTRODUCTION

Agility is the capacity to sense and respond to changing customer needs and to make timely, effective and sustained organisation changes to maintain competitive performance advantage over the longer term. Those organisations which are able to build agility as an organisation capability are those which are best placed to survive and thrive in uncertain times.

At CRF's 13<sup>th</sup> International Conference, **Agility 2.0: Building Adaptable Organisations**, leading business thinkers and practitioners took us on a learning journey as we considered what agility means at the strategic, organisational, leadership and individual level.

Over three days in Madrid, our international delegates gathered to consider what features distinguish agile organisations, and how to develop agility across multiple dimensions. Looking at how agile organisations develop strategy, we discovered that they successfully navigate a key paradox: developing a strategy that's adaptable and allows for rapid course correction as circumstances change, while at the same time remaining anchored to an enduring business purpose. They also allow for distribution of decision-making and rapid responsiveness to cues in the external environment while providing a clear frame of reference for evaluating strategic options.

We also considered the ways in which agile organisations are designed differently:

- 1 Flatter, decentralised structures that maximise surface area in contact with the outside world
- 2 Smaller unit sizes that foster shared commitment and customer responsiveness
- 3 A degree of slack in the system that allows for rapid redeployment of resources
- 4 Networks and cross-functional mechanisms that foster collaboration across silos
- 5 Cultures that promote experimentation, learning from experience and trust
- 6 Individuals who are equipped with the mindset, tools and methodologies to demonstrate agility in their day-to-day work.

Our days were interactive, participative and fun. We discussed, debated, challenged, reflected, and networked. We encountered new ideas, developed new insights, and drew new conclusions.

We hope this Retrospective, with its session summaries, speaker and delegate insights, key takeaways, and further resources, serves as a reminder of the time we spent together, and as a prompt to apply your learning to address your own organisational challenges.

For those who were unable to join us, we hope this Retrospective will encourage you to sign up for our next conference, [Applications and Implications of Emerging Technology](#), 7-9 October 2024 in Valletta, Malta!

[Gillian Pillans](#), Research Director, CRF



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**THE AGILE ORGANISATION**



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**Agility requires balancing paradoxes**, trade offs and tensions, such as committing for the long run whilst being adaptive in the short term, balancing purpose and profit, or both focusing and diversifying. Organisations need to reconcile these competing demands through adopting a 'both-and' mindset, and 'destroying to create' by eliminating projects or behaviours that are not adding value.
- 


More than just a buzzword, **agility goes straight to the heart of the organisation's ability to survive** and thrive in adaptive times. Agility should therefore always be anchored to a core purpose, or guiding north star, which should engage all stakeholders.
- 


**Organisations need to make conscious choices** about how and where they use agility, calibrating organisational design differently according to business needs. Avoid force-fitting agile teams everywhere in your organisation if it does not serve a purpose.
- 


Whilst agile organisations may be designed differently, they share common features – **decentralised decision making, proximity to customers, slack** built in, and designed for **lateral collaboration**.
- 

**Agility does not mean chaos and constant change**; there should be a frame of clear accountability and discipline in order to deliver on the strategy with a certain predictability.
- 

**Agility is underpinned by a culture that learns and experiments**. This should include an acceptance that not all experiments will be successful (tolerating mistakes, not incompetence) and a psychologically safe culture. Agility is a muscle strengthened through practice and the journey may feel uncomfortable at times.

**7**  **Storytelling, communication and change management are critical.** Organisations must tackle the 'ghosts' that can hamper progress: ghosts of the past (unprocessed trauma from previous failures); ghosts of the present (invisible patterns that employees follow unconsciously); and ghosts of the future (fear of losing identity). Organisations need to engage everyone in their agile journey and accept that some will 'self-select' out of the journey and leave.

**8**  **Watch for weak signals.** Develop mechanisms for picking up on emerging market or customer trends at the periphery of your vision. Find ways to bring this data rapidly to the attention of decision makers so you can act on those signals. However, don't ignore intuition when overwhelmed with data and information and remember that if you wait for conclusive data before acting, it may be too late.

**9**  **Individual level agility and mindsets are important.** Individuals need to foster resilient mindsets through viewing adversity as an opportunity for growth and practise being agile through trying new skills and behaviours.

**10**  The Chief Executive is pivotal to the success of your agile transformation. You are unlikely to achieve much without the active commitment of the senior executive team. **HR can play a critical role through providing change expertise and creating a supportive performance culture.**

**FURTHER CRF RESOURCES**

- CRF. 2017. [Organisation Agility](#)
- CRF. 2017. [Learning – The Foundation for Learning and Sustainable Performance](#)
- CRF. 2018. [Designing Adaptable Organisations for Tomorrow's Challenges](#)
- CRF. 2022. [Organisation Design for Agility](#)



## Agile Strategising

Strategic agility sounds like a paradox: if strategy is about making short-term decisive commitments and choices for the long-term, how can this concept be made agile? If strategy changes everyday, it is not really a strategy!

In complex, uncertain and fast changing environments, companies need to commit for the long run whilst being flexible and adaptive in the shorter and medium run. Strategic agility is the capability to give oneself options and be flexible by reconciling competing demands to thrive in uncertain environments.

To future proof themselves, companies need to master strategic agility at both the content level (i.e. where they compete and how they compete) and at the strategy formulation level (i.e. how they strategise).

### STRATEGY CONTENT

Options are essential to agility in an uncertain world. Therefore, executives need to shift from 'either-or thinking' to 'both-and paradox reconciliation.' Examples of competing demands that businesses may need to reconcile include:

- 1 PERFORM AND TRANSFORM:** companies need to both continue to innovate and deliver in today's core business while exploring their next S-curves and transforming to seize these opportunities. These changes should not be left to the last minute; strategic agility does not mean chaos and constant strategic change. Instead, combining present performance and transformation for the future makes companies stronger.
- 2 FOCUS AND DIVERSIFY:** Focusing makes it simpler to allocate resources but can make your company fragile if circumstances change. Conversely, diversifying mitigates risks but can spread resources too thin. When finding the right balance between diversification and focus, business executives need to consider their portfolio of products, countries and customer segments.
- 3 COLLABORATE AND COMPETE:** it may be simpler to control most resources and capabilities than to compete. However, future-readiness increasingly requires opening up to partnerships and the wider ecosystem to accelerate learning (e.g. sustainability transformations will likely require collaboration with competitors).

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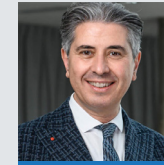
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**PROF STÉPHANE GIROD** is Professor of Strategy and Innovation at IMD Business School. His research, teaching, and consulting focus on the development of business agility in response to the many forms of disruption faced by organisations in today's world. He sets out his thinking on the topic in his book *Resetting Management: Thrive with Agility in the Age of Uncertainty*. He has particular expertise in the luxury sectors and leads IMD's Luxury 2050 initiative. Girod helps executives and established companies to foster agility at the strategy, organisational, and leadership levels in response to digital, (de)globalisation, and other forms of disruption. He is an expert on linking agility and digital transformations.



LINKEDIN

**DR. ANSGAR THIESSEN** is Global Head Operational Excellence and a member of the Operations Management Committee at Swiss Re Corporate Solutions, where he drives topics around Insurance of Tomorrow. Prior to this, he spent many years in leadership positions in change and management consulting. For more than ten years, he has been a thought-leader in how organisations can make their strategies broadly accepted and brought to life. Today, Thiesen is a regular lecturer and author on the subject at international business schools including CBS Copenhagen and IMD Lausanne.



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There are many tensions and obstacles to actually adopting a 'both-and' approach. As transformation experts, HR has a key role to play in managing these competing demands and in boosting the strategic muscle of leaders. This includes:

- 1 Ensuring people are hyper-aware, curious and consider the external world.
- 2 Creating clarity about which strategic competing demands matter for your organisation.
- 3 Removing any bottlenecks that impede 'both-and' thinking (e.g. by using OD tools to remove obstacles, creating incentives, or shaping leader's behaviour).

### STRATEGY FORMULATION

The way that companies formulate strategy is as important as what's in the strategy itself. The following are a critical part of making the strategy process more agile:

- 1 **PLAN AND IMPROVISE:** agile companies continue to run some level of traditional strategic planning (even if it means following a North star only) and to give more room to fluid experimentation and resource allocation. This could include mobilising employees' creative power.
- 2 **LINK STRATEGY FORMULATION AND EXECUTION MORE ITERATIVELY:** in his presentation, Ansgar Thiessen explained how he and the management team managed to turn around Swiss Re Corporate Solutions by closing four problematic gaps which were stopping employees from understanding and therefore delivering on the strategy: Alignment, Focus, Commitment and Action. Through an agile strategy activation process, this division managed to mobilise employees to breathe life into the new vision for the division and, through OKRs (Objectives and Key Results), identify which areas of the strategy or its execution had to be adapted in the journey.

**Remember that not every company needs to approach strategic agility in the same way: leaders need to calibrate how they reconcile competing demands and master the capabilities required by their industry and performance conditions, and even their ambitions.**

### CASE STUDY: SWISS RE CORPORATE SOLUTIONS

A few years ago, Swiss Re Corporate Solutions was unsuccessful and unprofitable due to a lack of engagement with the strategy, particularly below senior level. However, they were able to turn this around through agile strategising and activation. This included:

- \* Running highly interactive sessions to craft content for the strategy.
- \* Creating a visual representation of the strategy to support staff to better connect with the strategy and understand its context.
- \* Activating the whole organisation to engage with and deliver the strategy. For example, they created a dedicated strategy activation platform and people convened in small groups to discuss how they can best contribute to the strategy. This also enabled feedback loops into the strategy content.
- \* Implementing iterative 'expeditions' – cross-functional teams who identified barriers blocking the strategy. The findings at each stage were used to inform the next step.
- \* Adopting an agile approach to strategy implementation, including deriving annual 'must wins' informed by the previous 3 to 4 quarters and reviewing goals each quarter. Any learnings were taken forward into the planning of the next quarter.

**Senior management often respond to complexity with simplicity (e.g. 'the five pillars needed for success'). Instead, Swiss Re provided context to the complexity, rather than taking it away.**

### FURTHER RESOURCES

Girod, S. and Králik, M. 2021. *Resetting Management*. Kogan Page. <https://www.imd.org/research-knowledge/agility/books/resetting-management>

Girod, S., Birkinshaw, J. and Prange, C. 2023. *Business Agility: Key Themes and Future Directions*. California Management Review. Vol 65/4. [https://cmr.berkeley.edu/browse/issues/65\\_4](https://cmr.berkeley.edu/browse/issues/65_4)

Thiessen, A. and Wreschniok, R. 2023. *Strategy Activation Canvas*. Routledge. <https://uk.bookshop.org/p/books/strategy-activation-canvas-ansgar-thiessen/7534000>



## Agility 2.0 Needs Workforce 2.0: Ten Drivers of Success

In this session, Mercer's Kate Bravery and Kai Anderson introduced the **ten new truths\*** impacting work and the workforce in the people age, with a focus on three agility levers.

The need for agility is not new; we have long lived in an increasingly connected and complex world. However, Agile 1.0 struggled to deliver its promises due to excessive focus on processes, unmanaged information flows, loss of accountability and a lack of empowerment. In many cases, Agile was used as an excuse for chaos or lack of planning. These areas that Agile 1.0 overlooked should inform how we think about agility now. Specifically, Agility 2.0 should be:

- 1 Spread across the whole organisation (rather than just an 'HR' or 'IT' led intervention)
- 2 Anticipatory, based off new data and better insights
- 3 Based on experimentation
- 4 Led by a purpose (rather than agile for agile's sake)

### \*10 Truths for Winning in the People Age:

1. Goodbye Employees, Hello Contributors;
2. Stressed Out, Burnt Out, and Quietly Quitting;
3. The New Rhythm of Work;
4. It Doesn't Pay to Stay;
5. Purpose Rules and Empathy Wins;
6. Trust and Accountability Are a Team Sport;
7. Intelligence Is Getting Amplified;
8. Skills Are the Real Currency of Work;
9. Supply Is Unchained;
10. Sustainability Starts with People

A more relatable and flexible operating system is required to ensure sustainable growth. Agile 2.0 is therefore imminent, though building Agile@Scale requires a number of factors to work together.

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**KAI ANDERSON** is one of Germany's most sought-after change experts. He is driven by and driving topics of organisational agility and human-centered transformation. A sparring partner for executives, Kai supports realigning and transforming companies with modern people management. In 1999, he founded Promerit AG as a consulting firm for transformation and talent management. Today, he develops cutting-edge management methodologies such as the agile organisation model. Kai is a popular speaker at industry events and author of the books *Das Agile Unternehmen (The Agile Enterprise)* and *Digital Human*.

EMAIL

SLIDES



**KATE BRAVERY** is a Partner and the Global Advisory Solutions and Insights Leader at Mercer. Her role involves strategising growth opportunities for Human Capital Consulting, bringing new products to market and supporting the business' professional practices: Talent Strategy, Mobility, Workforce Rewards, Executive Rewards, HR Transformation and Communication. With experience in Human Capital consulting helping organisations to achieve a talent advantage through people, Kate has expertise in people strategy, talent management, assessment/ leadership development and HR process design.

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### FURTHER RESOURCES

Bravery, K., Bonic, I. and Anderson, K. 2023. *Work Different: 10 Truths for Winning in the People Age*. Wiley. PREORDER: <https://www.amazon.co.uk/Sustainable-People-Strategies-Organizations-Employees/dp/1394181299>



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Organisations need to understand the new rhythm of work that people are gravitating towards, re-evaluate how traditional pay models can better support agile ways of working and create a healthy workforce pipeline with capacity to embrace new ways of working. Mercer research shows that there are certain fundamentals organisations need to get right to achieve this:

- 1 **FOCUS ON CAPACITY** – where are you spending your energy? What gets in the way? What does your technology landscape look like?
- 2 **RETAIN A FOCUS ON HEALTH AND WELLBEING**, including looking at new metrics and using predictive modelling.
- 3 **BUILD A PARTNERSHIP MINDSET** amongst leadership, supporting leaders to renegotiate areas that are constantly evolving (e.g. pay).

Once organisations get the above three fundamentals right, then they can accelerate to focus on **three levers** that really unlock agility:

- 1 **SUPPLY UNCHAINED**: Tap into agile talent supplies to scale up/down. Agile 2.0 rests on flexing the supply curve.
- 2 **SKILLS ADVANTAGE**: Learning is the new knowing; flow to work beats agile teams. As many transactions become more automated, we will need to build relationship-focused skills (e.g. empathy, coaching, managing). Agility 2.0 will require learning in the flow of work.
- 3 **SMART WORKING WITH AI**: Generative AI will change 70% of all business processes by 2030, freeing up time from static work and creating an opportunity for enhanced creativity. HR will need to prepare the organisation for this AI-augmented future; Agile 2.0 will be built on humans and technology working together.

**Equipped with real-life examples, Mercer showed how HR leaders and the C-suite can chart a truly agile course for their organisations' long-lasting success. This includes rethinking work foundations and enabling agile/different working based on a culture of Trust and Accountability, Empathy, Equity and DEI. Always guided by company purpose and values (North Star), Agile 2.0 rests on flexing the supply curve, requires learning in the flow of work, and is built on the human-tech combination.**

- Q** **How does budgeting and funding come into this vision of Agile 2.0?**
- A** *We need to highlight the business case to secure funding, which is something that HR can struggle with. Putting people sustainability on your P&L can help. It's important to also look at the whole package of reward, putting compensation and benefits together.*





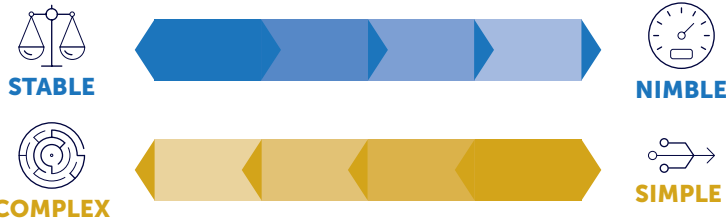
## Organising for Agility

Recent studies, including the latest [PWC State of Agile Report](#) (2023), agree: organisations are trying to reduce rigidity by embracing more agile ways of working. This enables them to respond to fast change and environmental uncertainty and embed digital transformation.

However, two factors hinder legacy businesses from reducing their rigidity: **excessive stability** (i.e. their lack of acceptance of risk taking in the form of innovation and entrepreneurship) and **excessive complexity** (e.g. layers and layers of hierarchy and multiple bureaucratic processes that do not add value and distract everyone from the market and customers).

In this session, Stéphane and Janine reviewed why legacy businesses' journey towards greater organisational agility should take the form of:

- 1 Accentuating their nimbleness without creating chaos
- 2 Simplifying the organisation without becoming simplistic



At the highest level, this is enabled by creating organisational designs and cultures that reconcile competing demands. The balance required between stability and nimbleness, and complexity and simplicity, will vary, with different organisations calibrating their organisational designs differently.

Most organisations have rolled out agile ways of working within their traditional hierarchies (i.e. hybrid organisations). These approaches tend to obsess over the mechanics and ceremonies of agile without changing incentives and rewards, leadership styles, or core values to form a glue between the agile and non-agile parts. In other words, most organisations are *doing* agile but not *becoming* agile.

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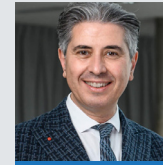
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LINKEDIN

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**JANINE VOS** is Member of the Managing Board and CHRO of Rabobank. She is also a member of the Supervisory Board of KLM and Olympia and participates in the Advisory Board of SER Topvrouwen and Social Capital. In 2017 Janine was declared 'CHRO of the Year' because of her vision on the future of work and her inspiring belief on the future of leadership. In 2021, she won the award 'Topvrouw van het Jaar', which empowers her in her mission to contribute to more diversity, equity and inclusion at work. Janine studied law at the University of Utrecht and started her career as corporate counsel at KPN in 1997. After several business roles she transferred to HR in 2005, where she became HRD in 2014.



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Another smaller group of legacy businesses have been creating radically new organisational forms to become more adaptive and entrepreneurial. Some, like Rabobank, have been using an approach known as 'agile at scale'. Others, like Haier in China, have been rolling out 4000 micro-enterprises networked with one another to create market breakthroughs at a cut-throat pace. This company achieved agility without doing agile.

The key for them is to:

- 1 **USE DESIGN PRINCIPLES** to accentuate the importance of faster customer experimentation, pushing empowerment and decision-making down to the front line. This should happen within a frame of clear accountability and discipline in order to deliver on strategy with a certain predictability. In these models, agility does not mean chaos.
- 2 **CUT DOWN ON HIERARCHICAL LAYERS**, simplify processes but avoid over standardising and force fitting processes and ways of working that do not make sense. These organisations use core values and a clearly communicated strategic frame to bond all employees together towards a mindset of collaboration, learning, customer orientation and performance delivery.

**Q What has been the role of leadership in Rabobank's agile transformation?**

*We first began by implementing agile in the management board – including daily huddles, rituals, a SCRUM master and an agile coach. This was important to role model and ensure the top management was on board – if your top management doesn't want to do agile then your initiative will likely fail. It's also important to think about who is your sponsor, and have 2 or 3 sponsors in the executive board.*

**Q How did you balance the values of staff supporting each other's development, whilst being accountable for their own?**

*This was discussed internally at Rabobank. We emphasised that people are not only responsible for their own craft, but also for ensuring that people learn from them. This approach was also recognised in performance management.*

**CASE STUDY: RABOBANK**

Rabobank implemented Simplify@Scale, an agility transformation initiative to support faster product development and customer service. This included:

- \* **Re-organising the business into multi-disciplinary teams (squads)**. Each squad has a product owner and specialists with different areas of expertise, speeding up decision making and building in risk management by design.
- \* **Ensuring accountability and discipline** through quarterly business reviews and budgets allocated on a quarterly basis, giving financial flexibility to respond to emerging challenges.
- \* **Encouraging agile leaders to step up their story-telling skills** to articulate the strategy in a way everyone can understand.
- \* **Accommodating complexity** and not force-fitting agile teams everywhere in the organisation if it does not serve a purpose. Additionally, Rabobank linked people working in an agile framework with those who were not through using one set of values, determined by employees.
- \* **No agility without learning and relearning**. Learning was secured by chapters, featuring specialists with the same areas of expertise.

HR played several essential roles in accompanying the transformation and mitigating its challenges. These include:

- \* Accompanying leaders to learn to refocus on what will drive performance in this new framework (e.g. shifting from focusing on input to output and delivery).
- \* Reinventing the employee journey: one cannot reinvent customer experience without rethinking the employee journey and clarifying what is expected from them in an agile culture.
- \* Combining HR with IT and facilities to create a really user-centered employee experience.
- \* Bringing all of HR together every quarter providing squads with space to stand up and report on what they delivered and learned, and impediments they faced. Learnings were then incorporated into future cycles.

**THE RESULT**

**Rather than just doing agile, Rabobank is being agile. For example, there has been a significant leap in employee engagement, customer satisfaction, and leadership. This gives space to employees, while the top and bottom line of the bank continue to outperform.**



## How to Make an Elephant Run Bupa's Transformation Programme

Driven by the need to move at greater speed and to adapt to new surroundings, Bupa has recently updated their organisational purpose, strategy and values. This includes a new 3x6 strategy to help Bupa achieve their purpose.

### WHY WE DO WHAT WE DO

#### OUR PURPOSE

Helping people live longer, healthier, happier lives and making a better world

#### WHAT WE'LL DO

##### OUR AMBITION

To be the world's most customer-centric healthcare company

##### OUR 3x6 STRATEGY

3x Ambition KPIs  
6x Strategic and Enabling Pillars

#### HOW WE'LL DO IT

##### OUR VALUES

##### BRAVE

Make new possibilities happen

##### CARING

Act with empathy and respect

##### RESPONSIBLE

Own your decisions and actions

### STRATEGIC PILLARS

#### CUSTOMERS

Obsession with our customers' experience

#### GROWTH

Strong performance and governance

#### TRANSFORMATION

Continuous innovation and preparation for tomorrow

#### SUSTAINABILITY

Making a positive impact on the world

### ENABLING PILLARS

#### DATA

Enhanced data-driven decision making

#### AGILE CULTURE

The best, most diverse people and a great place to work

### HOW WE'LL DO IT

#### KPIs

40%

Customer care touchpoints owned by Bupa

60%

Active digital customers

80

Net Promoter Score of 80

Overall Conference Takeaways

Agile Strategising

Agility 2.0 Needs Workforce 2.0

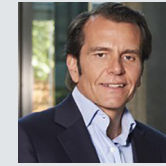
Organising for Agility

### How to Make an Elephant Run

Leading Through the Fog

From Adversity to Agility

Agility in Action



**IÑAKI PERALTA** is CEO of Sanitas Europe and Latin America. He is accountable for Bupa's businesses in Spain, Chile, Poland, Brazil, Türkiye, Mexico and Latin America. Iñaki was the General Manager of Sanitas Seguros, Bupa's health insurance business in Spain, from 2013 to 2020. He also led Bupa's health insurance business in Mexico. In his 20 years with Sanitas he has held a variety of roles including leading Sanitas Hospitals, and Operations Director of Sanitas Mayores, Bupa's aged care business in Spain. Iñaki holds a bachelor's degree in Economics and Enterprise Administration from the Universidad de Navarra, a master's degree in Management of Health Centres from ESADE, an MBA from IEDE and completed the AMP (Advanced Management Program) at Wharton.

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[SLIDES](#)



**NIGEL SULLIVAN** is Chief People Officer at Bupa. As a member of the Executive Team, Nigel leads the transformation of People Functions including all aspects such as payroll, operations, recruitment, talent, OD, engagement, training and development. Prior to joining Bupa, Nigel was Group Human Resources Director for TalkTalk from 2010 – 2017. He started his career in Human Resources at Rover Group and subsequently held senior HR positions at Nortel Networks, Marconi and the logistics group Wincanton plc. He is a Non Executive Director of the Royal United Hospitals NHS Foundation Trust in Bath.

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### MAKING THE ELEPHANT RUN

Bupa created the metaphor of ‘making the elephant run’ in order to make the transformation strategy more easily accessible for all employees. Creating an agile culture was a key strategic pillar of making the elephant run and included:

- 1 Prioritisation of communication, with a focus on explaining to all staff why Bupa needed to change and how they could be part of it. This included creating the **‘Running Elephant’** podcast.
- 2 Adopting a customer listening approach where the whole organisation is encouraged to listen to customers and innovate based on what they heard. As part of this, Bupa has a customer listening app, based on NPS methodology, into which people can put ideas.
- 3 Changing payment plans so that management were incentivised to deliver the new strategy. Bupa’s lack of shareholders enabled greater flexibility in reward.
- 4 In Bupa Europe and Latin America, the organisation created the **‘We have a Dream’** tool in 2021. This encouraged everyone to dream big to implement the strategy.
- 5 Running an **‘Eco Disruptors’** competition, now in its third year. In this project, 18 squads, each containing 7 people, look for disruptors in the eco space and support them with a 13 week agile development programme, all whilst working to an agile methodology. Bupa then awards prize money to the employee-selected winner.
- 6 Implementing a leadership programme called Bupa Advanced, based on the ideas of **Run, Change and Empower**. The ability to run and change at the same time is difficult – Bupa has therefore invested in identifying and equipping talent to excel in these areas.

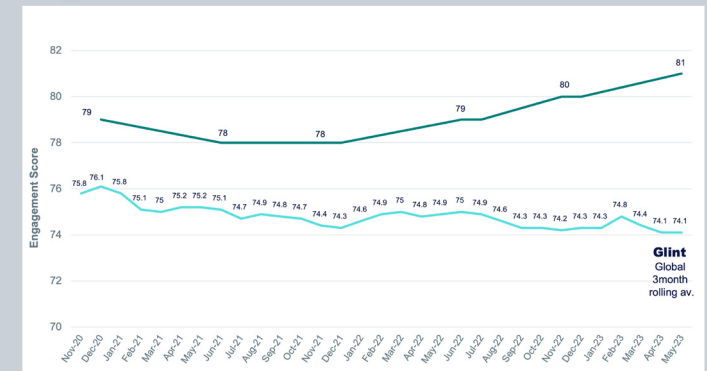
### RESULTS

Since the strategy began to be implemented in 2020, Bupa has seen considerable growth and is now on the path to 50 million customers. Engagement is also increasing, despite downward trends in the market.



### VIEW THE BUPA ENGAGEMENT SCORE HERE:

*Click to enlarge*





## Leading Through the Fog

Today's turbulent world presents unique and persistent challenges. Data to justify a decision comes in when it is too late to decide and yesterday's strengths become tomorrow's weaknesses. Seemingly conflicting demands – purpose/profits, life/work, empowerment/decisiveness, meritocracy/inclusivity – feel paralyzing. In other words, leaders are in a thick fog. How do we thrive in this uncertainty and speed up when everything tells us to slow down?

In his session, Scott Anthony described how thriving in an era of predictable unpredictability requires embracing the *Dao of Disruptive Change*. Specifically, leaders should:

- 1 ACT WHEN THE DATA TELLS THEM NOT TO** by amplifying weak signals of change. If you wait until the data is conclusive to act, it will often be too late.
- 2 LISTEN TO THE VOICE THAT DOESN'T SPEAK.** A lack of meaningful alignment is a critical problem for organisations – individuals often verbally agree to ideas that internally they do not truly believe in and groups collectively decide to do what no one individually wants. **Strategic sparring\*** sessions can help surface hidden misalignment.

**\*Strategic sparring** applies a structured session to a problem with no clear answer. It is based on:

- Data-informed (rather than data-driven) dialogue.
- Framing the discussion as a battle of assumptions, not beliefs (thus making the discussion less emotional).
- Making the alignment as visible as possible, such as showing your position on an imaginary line. Physically seeing where people stand and hearing the assumptions which inform this has been shown by research to lead to more robust discussions and better alignment.

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**PROF. SCOTT ANTHONY** is passionate about helping individuals and organisations to develop the capacity to thrive in today's world of never-ending change. He is a Professor at the Tuck School of Business at Dartmouth College, where he teaches: Leading Disruptive Change, and a Managing Director and Partner Emeritus at Innosight, where he helps leaders design new growth strategies, build innovation capabilities, navigate disruptive innovation, and manage strategic transformation. Scott has written eight books, including most recently *Eat, Sleep, Innovate* (2020) and *Dual Transformation* (2017), which describe how forward-thinking organisations can navigate disruptive change and own the future. He has given keynote addresses on six continents and is Harvard Business Corporate Learning's most in-demand external subject matter expert. In 2021 Scott was named the world's seventh most influential management thinker by Thinkers50.



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**LEADING THROUGH THE FOG**

### FURTHER RESOURCES

Anthony, S., Colella, K., Ottman, E. and Waldeck, A. 2023. **What Lies Beneath.** *Dialogue.* <https://dialoguereview.com/what-lies-beneath>

Siren, M.A., Anthony, S. and Bhatt, U. 2022. **Persuade Your Company to Change Before Its Too Late.** Harvard Business Review. [www.hbr.org/2022/01/persuade-your-company-to-change-before-its-too-late](http://www.hbr.org/2022/01/persuade-your-company-to-change-before-its-too-late)



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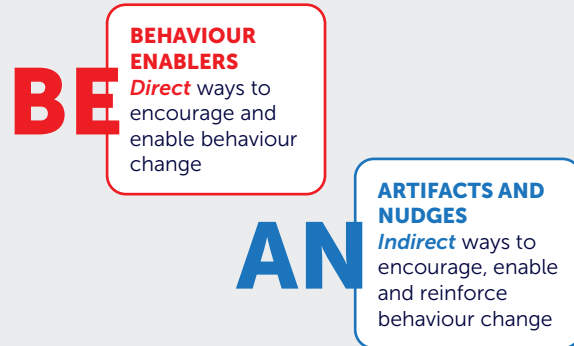
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**3 DESTROY TO CREATE** by identifying the **'ghosts\*'** which inhibit change efforts and defeating them. Learning to say no gives us the time and resources to do things which add value.

**\*Ghosts** inhibit change and agility. Echoing Charles Dickens' A Christmas Carol, the three common ghosts we encounter are:

- Ghosts of the past (e.g. unaddressed organisational trauma, such as a previous scandal or failed product launch).
- Ghosts of the present (recurrent invisible patterns that employees follow without being aware of them 'this is the way we've always done things').
- Ghosts of the future (the fear that change will invalidate someone's identity).

The **'BEAN' tool**, informed by change management literature, can help to defeat these **'ghosts.'** It is based on addressing change on two fronts – the rational part of our brain (through behaviour enablers) and the unconscious part of our brain (through artefacts and nudges).



These paradoxical practices require leaders to build the adaptive capacity to turn ambiguity into opportunity and accelerate when the fog of uncertainty descends. Scott Anthony described how adaptive capacity has three components:

- 1** The **COGNITIVE** capacity to use multiple frames to identify the widest range of possible solutions. Deliberately wandering and exploring new possibilities helps to build this capacity. This includes exposing yourself to new circumstances, such as actively trying new technologies.
- 2** The **EQUANIMITY** to stand calm in chaos, keeping grounded in the face of what can feel like overwhelming options. Leaders can build equanimity by consciously slowing down to speed up. For example, during a meeting, pay attention to data such as body language or who speaks and when. Tools like reflection and meditation can also help.
- 3** A **PARADOX MINDSET** that draws energy from tensions to identify 'both/and' solutions. The number of tensions and choices (including in agility) that we are faced with can make leaders feel paralysed. However, we have the power to explore both through embracing a paradox mindset; a 'paradox quest' to the unknown and unexpected can help leaders to build their comfort with discomfort.

**When the fog of uncertainty descends, it is natural to want to slow down. The right mindsets, mental models, and approaches can allow leaders to navigate disruptive change and own the future.**



## From Adversity to Agility

Professor Locke talked about the importance of individual agility and how leaders must start with boosting their own agility if they are to help others become more agile.

She talked about agility as a product of **attitude** and **ability**, in the same way that performance is a product of motivation and ability. In other words, we must be motivated to become agile.

### 1 ATTITUDE OR MINDSET

A resilient mindset is one that sees adversity as an opportunity for learning or growth. Resilience does not mean never feeling nervous, frustrated or angry, but it does mean being able to move on from setbacks more quickly. With the right tools and attitude, we can grow and become more resilient as the result of pain.

Part of adjusting our mindset includes becoming aware of negative voices in our heads and replacing them with positive voices. For example, referring back to a mental list of specific compliments can help to overcome impostor syndrome.

Additionally, do not fear negative emotions; these actually provide useful information. Instead, notice these emotions and consider what they are telling you. For example, is the problem: something within you (e.g. insecurity, fear), something out of balance in your physical body, or something in your environment that needs to change?

Professor Locke shared several tools to deal with negative emotions and increase awareness and acceptance:

- 1 **MINDFULNESS-BASED STRESS REDUCTION** This research-backed process makes the emotion generating part of the brain less reactive and emotions less strong and overwhelming.
- 2 A four-step process for **HANDLING NEGATIVE EMOTIONS**:
  - Notice the negative emotion
  - Realise it is inside you and not in reality
  - Do not identify with it ('frustration is here' vs 'I am frustrated')
  - When you change, everything changes



**PROF. CONNON LOCKE** joined the London School of Economics in 2008 where she teaches Leadership, Organisational Behaviour, and Negotiation and Decision Making. Connon has over 30 years' experience as an educator, coach, and consultant working in Europe, Asia Pacific, North America, and Australia. Prior to entering academia, she served as Regional Training and Development Manager for the Boston Consulting Group where she was responsible for the learning and development of consulting staff in 10 offices across Asia Pacific. Connon holds a Ph.D. and M.Sc. in Business Administration (Organisational Behaviour) from the University of California, Berkeley and a B.A. in Sociology from Harvard University where she graduated with honours. Her book, *Making Your Voice Heard*, uses the research on power and influence to help people speak up to those who have more power than they do.

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### FURTHER RESOURCES

Locke, C. 2021. *Making Your Voice Heard: How to Own Your Space, Access Your Inner Power and Become Influential*. Endeavour. <https://www.amazon.co.uk/Making-Your-Voice-Heard-influential/dp/191306820X>



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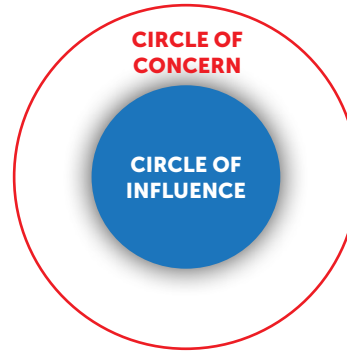
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- 3 **MORNING PAGES**, involving stream of consciousness writing of both thoughts and emotions, can help to reveal what might be bothering you and what you need to focus on.
- 4 Seek moments of awe, shifting your brain away from a **DEFAULT MODE NETWORK** (i.e. overly processing information in an ego-centric way). This could include nature, music or hearing inspiring stories.

**2 ABILITY TO BE AGILE**

Research shows that learning new skills and trying new behaviours helps us to practice being agile.

Begin by considering your **Circle of Influence**, focusing on what you can change and learning to accept the rest. Change the mindsets of people who are in your Circle of Influence by first asking questions and knowing the right time to act.



The following also help to increase the ability to be agile:

- 1 Experiment with different behaviours and learn new skills. For example, successful leaders develop by trying on different 'selves.'
- 2 Accept that trying new things can feel uncomfortable – that doesn't mean it is wrong.
- 3 When making changes to reach a goal, consider how you will measure this.

Most importantly, agility requires building a strong core of values and principles to guide oneself and one's decisions. This can be thought of as core values which guide your life and work, though the way you apply these values will depend on the context. Steps to develop, and stay true to, this core include:

- 1 Manage your expectations of others by acknowledging that people are at different stages of human development.
- 2 Think about the types of situations or people that anger you the most: what does this tell you about your principles and values?
- 3 Remember that building your psychological core takes time.

**Conson finished with a reminder that life is more than work and we must think about our lives holistically, building in habits that address all aspects of our lives, from community to celebration.**





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## Agility in Action: a CIA Toolkit

In our closing session, we learned how to put 'Agility into Action' through Rupal Patel's Frameworks, focusing on agility as both the way we perform under stress and pressure, and an important tool for driving career growth. Agile decision making is the fundamental core of how we run organisations and live our lives.

Rupal led us through her CIA-derived scenario training to help us uncover our instincts and identify how we make decisions under pressure. This highlighted how:

- 1 Leaders can wrongly conflate information that appears similar, while missing out on important distinctions.
- 2 Agility is responding without 'baggage' from past experiences.
- 3 We all have instincts in high-pressure situations. However, we can learn new ones.

Rupal additionally shared her **Five Agility Levers** framework to leave attendees with a toolkit they can use to train their agility muscles, enabling them to start to distinguish between business-critical 'signal' and distracting 'noise'.

- 1 **INTENTIONAL CONSTRAINTS**
  - The number of possibilities we face can be overwhelming, leading to decision fatigue. Implementing intentional constraints on the choices we make can help with this.
  - Creating Resource Efficient Discovery (RED) teams (i.e. small teams of 5-10 people with limited resources) is one way to implement this.
- 2 **EXPOSURE**
  - Tap into and analyse the extensive exposure we already have from experience and training.
  - Consider what scenarios you can put yourself or your team in to build your exposure (e.g. high pressure situations or complex board meetings).



**RUPAL PATEL's** high-octane career has taken her from military briefing rooms in jungles and war zones to corporate boardrooms and international stages. During her career as an analyst and field agent at the CIA, she advised Four-Star Generals, earned War Zone Service Medals, and was recognised by the CIA Director for "superior support to the President of the United States." After leaving the CIA, she earned her MBA from London Business School and started her first business. Called a "Power Woman" by *Harper's Bazaar Magazine* and a "super-strategist" by clients, Rupal is a sought-after international speaker and corporate consultant working with organisations around the globe. Her work has been incorporated into the MBA and Executive MBA programmes at London Business School, Henley Business School, and the University of Edinburgh Business School. She is the author of the international best-seller *From CIA to CEO: Unconventional Life Lessons for Thinking Bigger, Leading Better, and Being Bolder*.

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### 3 INTUITION

- There is so much data and information available to us, causing us to second guess ourselves and ignore what we know to be true. This is where intuition can be hugely valuable.
- However, intuition should be questioned and trained. Exposure, meditation, reflection and visualisation are all ways of doing this. Aim to use intuition consistently.

### 4 CURIOSITY

- Expand perceptions through a learning (and adapting) mindset.
- Consider what might be able to happen, rather than what is not possible.

### 5 EXPERIMENTATION

- Adopt a 'let's see' approach.
- Accept that experimentation will not always lead to the desired outcomes, and accept what you can control.
- Capture (and apply) lessons through an end of year or After Action Review.

The following two steps help to embed agility into organisational structure and individual leadership styles.

**1 AGILE CULTURE** create a culture where it feels safe to fail and leadership is everyone's responsibility.

**2 AGILE LEADERSHIP** develop your agility 'muscle' by training it (e.g. through the five levers) and by accepting that no human can have all the answers. Learn from others around you (both above and below).

**Q Can you share an example of when the experimentation lever did not work and what you were able to learn from it?**

**A** *Rupal's first company tried an experimental new product which investors did not like. From this, she learned that you cannot always take everyone with you and that the self-awareness to realise this is important. In that scenario, it would've been better to have found different investors with values that were more aligned to her company. Also remember that most failures aren't existential or final and we usually have more room to fail than people think.*

**Q Leaders are often sceptical about using intuition. How can we overcome this?**

**A** *You have to speak their language. Some people may dismiss anything based on intuition – subtly nudge these people. This highlights the importance of communication, including understanding what makes people tick and adjusting your message according to people's life stages or mindsets. And remember that you can arrive at your own personal intuition, but you can't expect everyone else to do the same.*

### FURTHER RESOURCES

[Rupal's Guided Reflection](#)

[My Unexpected Discovery About Working at the CIA TEDxManchester](#)

Patel, R. 2022. *From CIA to CEO*. Heligo Books. <https://www.ciatocoo.com>



## Creating a Cultural Movement: How to develop management capability alongside conscious leadership behaviours

### AGILITY ANCHORED IN THE PANDORA RISE LEADERSHIP PROGRAMME

Over the last 18 months, the team at Achieve Breakthrough have worked on a global organisational leadership and management development programme for Pandora – ‘Pandora RISE’. The programme has been run in 17 different languages, across all business areas and functions, four tiers of people managers and has reached over 3,500 leaders. There are currently 135 cohorts in the programme, which may expand further as roll-out continues in 2024.

The programme is designed to deeply embed four key leadership behaviours which align with Pandora’s core values and help the organisation execute its current strategy: Ambition, Empowerment, Courage, and Accountability.

A key differentiator of Pandora RISE has been the unique blend of Achieve Breakthrough’s Breakthrough Methodology mindset tools and more traditional management capability work. Bringing these two together has allowed RISE participants to delve deeper into key leadership capabilities such as coaching, performance management and giving feedback.

**Breakthrough thinking** is the well-honed secret ingredient of all Achieve Breakthrough’s development programmes. Implemented through an online programme blended with self-paced learning, it allows leaders to break free from limiting conventional wisdom. In some regions, Achieve Breakthrough has additionally created a more dynamic and hybrid learning approach, seamlessly blending face-to-face and online delivery for an enhanced participant experience – all supplemented with self-paced learning.

### PROGRAMME IMPACT

The following are testament to the programme’s contribution to nurturing talent and fostering loyalty:

- 1 **EMPLOYEE ENGAGEMENT:** The difference between RISE and non-RISE leaders is stark – this reflects the programme’s effectiveness in enhancing engagement (4%) and satisfaction (14%).
- 2 **LEADERSHIP EFFECTIVENESS:** A remarkable 120% surge in capability shows how Achieve Breakthrough has cultivated strong, impactful leaders.
- 3 **EMPLOYEE DEVELOPMENT:** The programme has been crucial in growing and developing our leaders’ teams, with a huge difference in numbers of development plans (71% vs 20%) and performance goals (87% vs 26%).
- 4 **RETENTION:** RISE leaders have a 6.7% better retention rate, equating to a staggering saving in recruitment fees
- 5 98% achieve their **LEADERSHIP COMMITMENTS** – all participants had a breakthrough outcome in terms of tangible business results and intangible team development
- 6 93% **OVERALL IMPACT** of the RISE development programme

**The numbers, however, only tell half the story. Hundreds of RISE graduates are creating real impact in their own teams and achieving unprecedented successes.**

KEYNOTE SESSIONS

**ab** Achieve Breakthrough™  
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**Creating a Cultural Movement**

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**Bird & Bird**  
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### ACHIEVE BREAKTHROUGH CONTACTS

- ✉ [Bella Blazewicz](#)  
Strategic Lead Consultant
- ✉ [Ric Bulzis](#)  
Strategic Lead Consultant and Senior Partner
- ✉ [Mike Straw](#)  
CEO

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### FURTHER RESOURCES

- 🌐 [An Introduction to Achieve Breakthrough](#)



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## Can't Change or Won't Change? Evolve a Work-group Climate that Feeds on Change and Innovation

APS Trusted Advisors, Rob Field and Mike Davies presented an interactive workshop on developing team-based behavioural change, encouraging attendees to think about time management, engagement, psychological safety and productivity in team environments. The session then provided suggestions of how teams can improve collaboration to positively impact innovation and accelerate competitive advantage, including how to quickly achieve collaboration in new groups.

### KEY TAKEAWAYS

- 1 A PSYCHOLOGICALLY SAFE ENVIRONMENT** impacts employee retention, productivity and innovation.
- 2 UNDERSTANDING PERSONALITY** allows leaders to support team members' communication and learning styles and also boosts engagement.
- 3 Good ways to MEASURE YOUR CURRENT TEAM CLIMATE** include active listening, regular informal check-ins and surveys and polls.

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- ★ **Hogan Certification** 2-Day workshop 15% off. Contact [APS](#)
- ★ Save £400 when you book the 1-Day **Hogan Advanced Feedback** and 1-Day **Hogan Advanced Interpretation** Certification Workshops together. Contact [APS](#)

### APS CONTACTS

- ✉ [Mike Davies](#)  
Senior Learning and Development Consultant
- ✉ [Rob Field](#)  
Learning and Development Director

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### FURTHER RESOURCES

- 🌐 [Hogan Assessments Certification](#)  
Become a certified Hogan interpreter and deliver highly-effective behavioural change. Find out more and book your certification [here](#).  
Or take advantage of our Advanced Feedback and Advanced Interpretation Hogan Workshops package. [Contact us](#) to find out more.
- 🌐 [SkillsPilot](#)  
Next-Gen skills development for leaders. The way we learn and develop is changing as technology evolves. With current learning media tending to be knowledge focused, how do leaders improve and practice skills development that accelerate their performance?
- 🌐 [Team Dynamics, Climate and Culture Masterclass](#)  
Explore individual and team self-awareness, develop team problem solving capabilities and uncover biases, challenge assumptions, inferences and beliefs. This workshop will help accelerate familiarity and trust within the team, reveal psychological safety and improve engagement in your teams.



# Bird & Bird

## Introducing Generative AI in Your Organisation Top Tips for HR Leaders

The impact of generative AI on employment law is complex and multifaceted. Whilst it can harness data to transform business agility and decision making, it also poses challenges for employers – and as a HR professional it can be difficult to know how you fit in and what your role is in maximising opportunities and minimising legal risk.

Have you thought about the implications and what is coming up on the horizon? Is generative AI going to create job change? What legal hoops might you have to jump through to facilitate its introduction? Do you know if your employees are using it? Who owns what is created and how do you protect your secrets? Where is the line drawn with respect to employee accountability for the use of such tools? What policies are needed to regulate the workforce and minimise risk?

This masterclass, through discussion and use cases, examined the key employment law considerations agile companies should be mindful of when allowing or encouraging the use of generative AI tools at work.

### KEY TAKEAWAYS

- 1 **THE GATEKEEPERS OF GENERATIVE AI WITHIN AN ORGANISATION:** an overview of the impact of Gen AI on an organisation and the danger of HR not being involved in its ownership and management.
- 2 **PERCEIVED IMPACT OF GEN AI AT A 'TRANSFORMATIONAL' LEVEL:** the negative and, more importantly, positive perceived impacts of Gen AI on the workforce, whether that be job elimination, role changes, training and upskilling.
- 3 **IMPACT OF GEN AI AT A MICRO-LEVEL:** performance management, misuse by employees, litigation risks as well as discrimination and bias.
- 4 **EMPLOYEE ACTIVISM** in response to Gen AI.
- 5 **ORGANISATIONAL FRAMEWORK** and what a good Gen AI policy should look like.

KEYNOTE SESSIONS

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- ✉ [Furhat Ashraf](#)  
Partner
- ✉ [Charles Hill](#)  
Associate
- ✉ [Penny Hunt](#)  
Legal Director
- ✉ [Ian Hunter](#)  
Partner and Co-Head the International Employment Group

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### FURTHER RESOURCES

- 🌐 [International HR Services](#)
- 🌐 [Horizon Scanning: Summer 2023](#)
- 🌐 [Managing Compliance: The People Risk Agenda](#)
- 🌐 [International L&E Club: The 5 in 10 Podcast Series](#)



## Don't make a Drama Out of Succession Planning

Companies face various challenges when contemplating their future talent management strategies. Whilst getting this right is a critical strategic priority, organisations often find that candidates are neither perfect nor ready.

The root of the problem lies in the process and the difficulties in identifying the capabilities and management mindset that align with what's needed for the organisation's future.

### KEY TAKEAWAYS

- 1 **CLARITY IN LEADER PROFILES FOR THE FUTURE:** To ensure a smooth succession, organisations must have a crystal-clear understanding of their forthcoming business strategy. Rather than seeking replacements who mirror departing leaders, it is crucial to define a leadership profile that aligns with future requirements.
- 2 **EFFECTIVE IDENTIFICATION AND EVALUATION:** Establishing a robust identification and evaluation process is paramount. This entails gathering multifaceted input from diverse sources, such as 360-degree assessments, structured interviews, psychometric tests, and the incorporation of business simulations for assessing candidates in simulated future scenarios. These will help provide a comprehensive view of a candidate's capabilities.
- 3 **PREPARATION FOR FUTURE LEADERS:** It is important to acknowledge that internal candidates may not be fully prepared at the outset. Investment in training, coaching, special projects, and experiential learning, including participation in business simulations, is key to nurturing their readiness.
- 4 **TRANSPARENCY IN THE PROCESS:** A lack of transparency can lead to conflicts and confusion during succession. While maintaining confidentiality is essential, a well-planned process can minimise doubts and issues, fostering a smoother transition.
- 5 **EFFECTIVE ONBOARDING:** Proper onboarding plays a pivotal role in ensuring the success of new leaders. The focus should be on seamlessly integrating them into their roles during the initial years. This entails building trust, credibility, and a strategic vision.

Incorporating business simulations for assessing candidates adds a dynamic dimension to the succession planning process. Simulations enable organisations to witness candidates in action, assessing their business acumen, people skills, and their ability to handle situations while interacting with stakeholders.

**By making succession planning an integral part of their business strategy, organisations can uphold their corporate culture and prepare themselves for any transitional challenges that may arise. Preparedness for the future is not just desirable – it's essential.**

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- ✉ [Dr. Larisa Balleani](#)  
Head of Assessment, Europe
- ✉ [James Blaker](#)  
Senior Vice President and Head of BTS London
- ✉ [Sarah Woods](#)  
Partner, Global Leader of Executive and Team Performance Practice

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### FURTHER RESOURCES

- 🌐 [A CEO's Guide to Replacing Yourself](#)
- 🌐 [Transforming Succession Management From Business Liability To Strategic Strength](#)
- 🌐 [Five Reasons Why CEO Succession Fails, and How to Get It Right](#)

### CRF MEMBER SPECIAL OFFERS FROM BTS

- ★ The book that distills the research that cracks the code on executive presence – the rare combination of qualities that makes a truly great leader: what it is, why it matters and how it can support organisations develop new emerging leaders: **All the Leader You Can Be: The Science of Achieving Extraordinary Executive Presence.**

Authored by BTS Partner, Suzanne Bates. Available upon request from [BTS](#)



## Enabling Agility Through the Power of Dialogue

### THE WORLD OF WORK IS TRANSFORMING

The World Economic Forum defines the Fourth Industrial Revolution as building on the digital revolution of the last century. Characterised by a fusion of technologies, it is blurring the lines between the physical, digital and biological spheres. Bringing further disruption, increased complexity and ever greater ambiguity to the way we all work; it will challenge what work means to us at a personal and societal level.

### HOW WE WORK AND INTERACT IS CHANGING

In response, how we work, how we communicate with each and what we are responsible for is changing dramatically. Organisation structures are rapidly evolving: hierarchies are disappearing and matrix structures and agile/project teams are fast becoming the norm.

To achieve organisational agility and effectiveness, decision making is disseminated further down organisations, taking it closer to the point of impact, customers or clients. How we interact with each other requires an elevated level of communication; communicating mainly to ensure a clear transfer of information is no longer enough. Instead, we are required to leverage our communication to collaborate, ideate and build trust with other teams, and to engage and influence each other through matrix structures and networks.

### YET WE REMAIN THE SAME – AT THE PREDISPOSITION OF OUR HUMAN CONDITION

When we see agile behaviours, we recognise them and we feel their impact. We can describe the characteristics of an agile mindset and collectively we appreciate their value. However, stimulating and mirroring these behaviours in ourselves requires effort and determination to offset our biases. We like certainty, we draw from our past experiences and we have an aversion to risk. Equipping ourselves to acknowledge and respect our mechanised state of mind is a solid start. Through using techniques to unlock how our brain works, and through deliberate practice in conversations, we can develop agile capability.

### DIALOGUE IS THE NEW CURRENCY

How we converse is a critical key to enabling empowered organisations – a cornerstone of an agile culture. LHH have observed the power of building coaching habits into everyday conversations.

To help get started, LHH recommended three powerful conversational habits from the practice of coaching to stimulate an agile mindset in leaders, teams and individuals.

### 3 POWERFUL CONVERSATION HABITS

- 1 **ASK DON'T TELL – THE POWER OF INQUIRY:** Using a curious mindset and skilful questions to broaden and deepen the conversation to discover new thinking.
- 2 **REFRAME THE PICTURE:** To overcome barriers to scenarios, re-framing can stimulate a new perspective on how to approach the topic and re-energise for action.
- 3 **BEING NON JUDGEMENTAL:** Intentionally provide space and time for people to think, talk and converse without judgement. This encourages new ideas and emotional connection and should be practised with positive listening.

**Applying core skills into everyday conversations contributes to building an empowered and psychologically safe culture.**

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### LHH CONTACTS

- ✉ [Claire Jordan](#)  
Leadership Development Solutions Director
- ✉ [Marie Shaw](#)  
Global Strategic Solutions Partner

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### FURTHER RESOURCES

- 🌐 [Manager as Coach](#)
- 🌐 [Leader as Coach](#)



## Building a Skills-Powered Organisation

The masterclass shared the landscape for skills within organisations and some of the key challenges that businesses need to get right. We know that skills are no longer just a list of bullet points on a job description – in many organisations skills have actually begun to supplant jobs as the primary currency of work. In recent years, especially post pandemic, organisations have been racing to make this transition, building processes and rolling out artificial intelligence (AI) based technology to help them navigate the supply and demand and forecast skills within their organisations. However, many are still struggling to turn this understanding into an infrastructure they can use to power productivity, agility, talent development and growth. An employee centred design will ensure success.

### KEY TAKEAWAYS

- 1 THE 'JOB TO WORK' RELATIONSHIP IS SHIFTING.** Work is being reconfigured with a new talent supply and demand equation. Leading organisations are connecting skills to work using marketplaces, creating new experiences and careers. When making this shift, it is important to start with the work itself – current as well as future tasks. Then you can determine the optimal combination of humans and automation. For humans, there is a full array of options including gig, freelance, alliances etc. Many of these options allow talent to 'flow' directly to work.
- 2 TAKE A HOLISTIC APPROACH TO SKILLS.** It is easy to rush into skills by focusing on the technology. However, Mercer's research shows a more sustainable approach aligns skills to the needs of the business first. This means building a business case aligned to strategy, but also ensuring the vision and case for skills resonates with employees, line managers, HR and wider stakeholders. This is done by reviewing the use cases for skills and thinking through how you will use skills in talent acquisition, learning and development, and reward etc. At this point, many organisations identify their return on investment (ROI) measures e.g. employee engagement, internal mobility, learning hours.

- 3 DEVELOP A CLEAR CAREER FRAMEWORK AND SKILLS TAXONOMY.** Many organisations currently select a well-developed data source, such as job architecture with skills attached to each profile/family. In tandem, it is important to ensure clear definitions and develop a common understanding of skills, proficiency levels and levels of skills (i.e. organisational, functional and individual skills).
- 4 TEST SKILLS USING PILOTS TO PROVIDE ROI.** We have found that most organisations began with a use case focused on reskilling in areas deemed critical or where skills are in short supply in the market. However, there are a whole range of adjacent pilots out there including: skills led strategic workforce planning, skills targeted talent acquisition or internal projects fuelled by skills. Find what works for your organisation and demonstrate the ROI and relevance. Experimentation is key in working out your journey and enabling scalability.

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### MERCER CONTACTS

- ✉ [Marcus Downing](#)  
Partner Workforce Transformation
- ✉ [Paul Habgood](#)  
Partner and Global Skills Subject Matter Lead

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### FURTHER RESOURCES

- 🌐 [Using Skills Frameworks to Initiate a Skills-Powered Organisation](#)





## Agility and AI in HR: Friend or Foe?

Artificial Intelligence (AI) and the emerging concept of Generative AI (Gen AI) are profoundly influencing the HR function, transforming how we manage our most important asset – people. AI, powered by advanced machine learning algorithms and data analytics, holds significant promise for revolutionising various HR areas, providing greater insight and therefore business agility. Oracle see primary disruptions in these areas:

- 1 **RECRUITMENT AND TALENT ACQUISITION** where AI streamlines the hiring process by analysing candidate data, predicting job fit, and automating initial screening. This ensures a faster, more efficient hiring process, ultimately enhancing workforce quality and reducing recruitment costs.
- 2 **AI-POWERED TOOLS** can optimise employee onboarding and training programmes by personalising learning experiences based on an individual's capabilities and learning style. This leads to a more engaged and skilled workforce, positively impacting overall productivity and employee retention.
- 3 **AI-DRIVEN PREDICTIVE ANALYTICS** can assist HR in workforce planning and performance management, providing insights to allocate resources effectively and identify areas for skill development, further improving organisational performance.

However, the integration of AI in HR also brings about certain risks and ethical considerations which should guide our adoption of this technology:

- 1 **PRIVACY CONCERNS** regarding employee data and potential biases in AI algorithms must be addressed with rigorous data protection measures and ongoing algorithm auditing.
- 2 **BALANCING THE USE OF AI WITH MAINTAINING A HUMAN-CENTRIC APPROACH** is crucial to ensure fairness, transparency, and a supportive work environment.

In conclusion, AI and Gen AI are ushering in a transformative era for HR, impacting recruitment, talent development, and performance management. SaaS technology acts as an enabler, simplifying the integration of AI into HR processes. However, mindful consideration of risks, ethical implications, and the human element remains critical to ensure a responsible and effective implementation of AI in HR.

**Why Oracle?** SaaS technology plays a pivotal role in enabling the widespread adoption of AI in HR. Cloud-based SaaS solutions offer scalability, flexibility, and cost-effectiveness, making it easier to implement AI-driven HR tools without significant infrastructure investments. Moreover, SaaS platforms facilitate seamless data integration and accessibility, allowing HR professionals to harness the power of AI for data-driven decision-making and strategic planning.

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### ORACLE CONTACTS

- ✉ [Dan Balshaw](#)  
HR Transformation Director
- ✉ [Sarah Horne](#)  
HR Transformation Director

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### FURTHER RESOURCES

- 🌐 [Human Capital Management \(HCM\) | Oracle United Kingdom](#)
- 🌐 [AI in Human Resources: The Time is Now \(oracle.com\)](#)
- 🌐 [Oracle Introduces Generative AI Capabilities to Help HR Boost Productivity](#)



## We are Agile and Psychologically Safe

This session explored the challenges of leading in a fast-changing environment, responding to individual reactions to pressure, maintaining equilibrium for oneself and creating an environment that gets the best out of others.

### THE ROLE OF LEADERSHIP

RHR's session delved deeper to explore the concept of maintaining wholeness and to embrace the 'shadow'. Understood since time immemorial and a fascinating feature of growth and development, the shadow is often short-changed. RHR suggested that to realise one's full potential and achieve wholeness, leadership development is about leveraging conscious positives as well as shadow characteristics. Hogan inventories provide some illumination of the shadow, and RHR explored that lens.

RHR's main message was that leadership development and the ability to thrive in high stakes comes only when a leader has full appreciation of the whole self. Indeed, under stress and pressure, the shadow self becomes more important – to harness as well as manage. Literature is replete with glimpses of psychological struggles and entertaining scripts for the development of the human condition; Goethe's Faust is the classic merging together of an unsure self and the shadow.

RHR examined the implications of operating in the shadow and for (consciously or not) creating an environment in which the leader is no longer getting the best out of the talent available to them and reducing their ability to be agile and empowered.

### KEY TAKEAWAYS

- 1 RHR showed how **FEAR ATTRACTS FEAR**, and the more fear we hold, the greater the impact on psychological safety. We need to move past our ego.
- 2 RHR examined the **CONSEQUENCES OF THE DRIVE TO ACT AND REACT AT PACE**, how it drives leaders towards operating and its implication for the environment the leader creates.
- 3 RHR positioned the important success factor of achieving **PSYCHOLOGICAL SAFETY** as an outcome of the well-managed self.

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### RHR INTERNATIONAL CONTACTS

✉ [David Cumbebatch](#)  
Partner

✉ [David Langdon](#)  
Partner

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### FURTHER RESOURCES

🌐 [What Makes an Inclusive Leader?](#)

🌐 [Beat Unconscious Bias](#)



**WITH SPECIAL THANKS TO CRF PARTNERS**

**KEYNOTE SESSIONS**

Overall Conference Takeaways

Agile Strategising

Agility 2.0 Needs Workforce 2.0

Organising for Agility

**PARTNER MASTERCLASSES**

How to Make an Elephant Run

Leading Through the Fog

From Adversity to Agility

Agility in Action



**FURTHER RESOURCES AND OFFERS FROM CRF PARTNERS**

**Beamery**

- [RIP Workforce Planning: How Skills Intelligence and AI are Changing the Game](#)
- [The Talent Blueprint Podcast](#)

**beqom**

- [beqom: Building a High-Performing, Happy Workplace](#)
- [Continuous Performance Meets Continuous Compensation](#)
- [Rewarding the Moments that Matter](#)

**Harvard Business Review**

- [Make It Safe for Employees to Speak Up](#)
- [How to Solve Tough Problems Better and Faster HBR Ideacast](#)

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Organising for Agility

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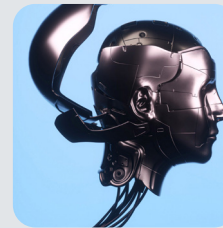
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**Evidence-Based HR: A New Paradigm**



**A Systems Thinking Approach to Organisational Change**



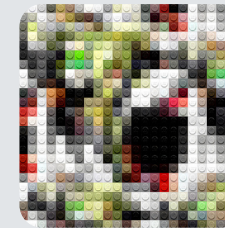
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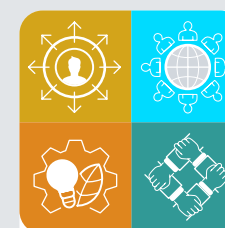
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**HR Leaders' Network End of Year**



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