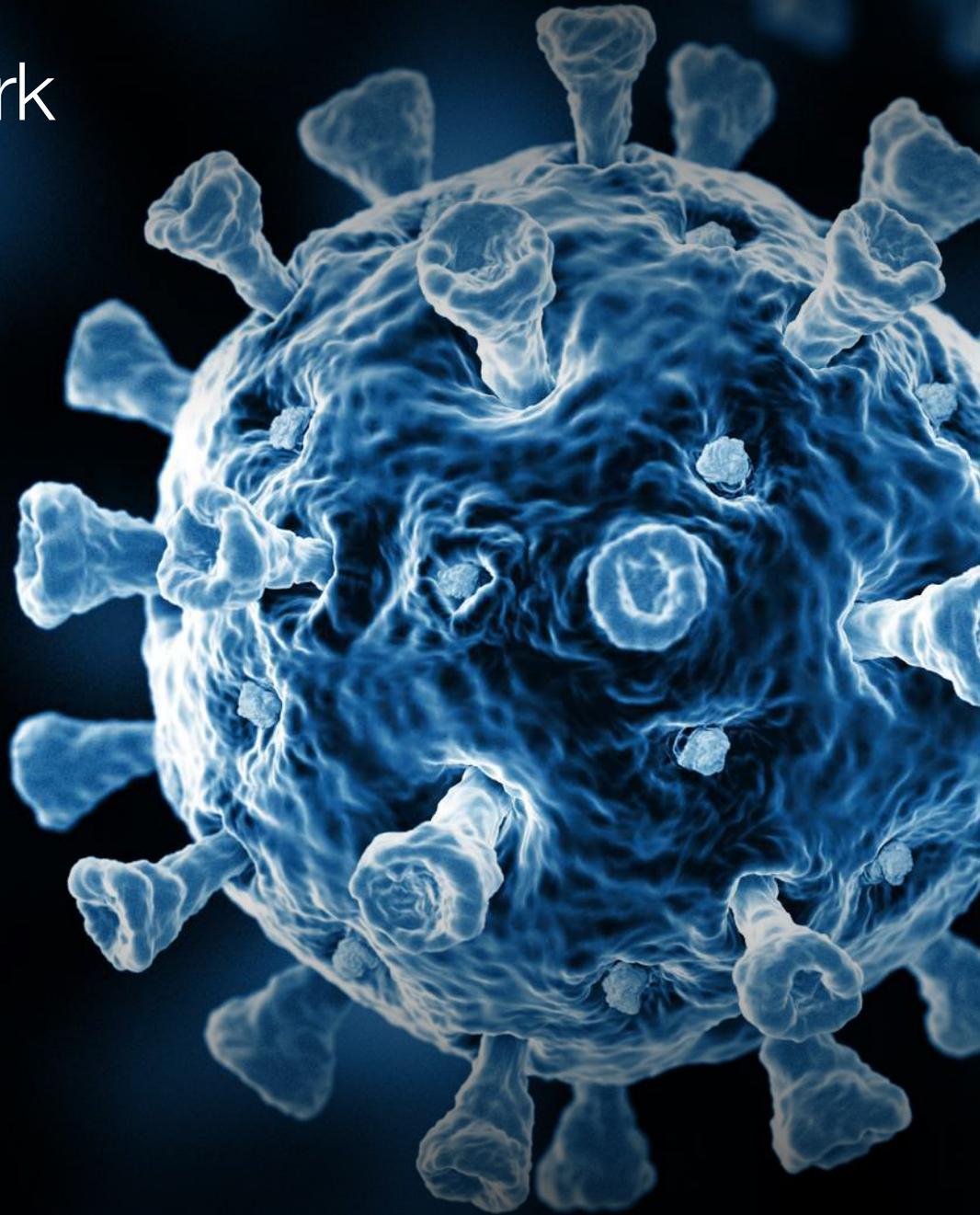


The Big Reset Playbook

Hybrid Work



joshbersin

“Hybrid work represents the biggest shift to how we work in our generation,” said Microsoft CEO Satya Nadella, in late May, while announcing the company’s guide to hybrid work: [Hybrid Work: A Guide for Business Leaders](#).¹

Thus far, 2021 has been a year of transformation, and filled with unprecedented complexities. As the number of COVID-19 cases declines in the U.S. and Europe, many of these Western nations are now preparing for a new world of work, with all the challenges that will entail. Just as there was no playbook for the rapid shift to remote work in early 2020, there is no clear model for the new world of hybrid work. While many CEOs expect a “return to work” as the pandemic ends, it is now obvious we are moving forward, not making a return to the past, and companies are adapting to a new, more flexible, forgiving, hybrid work environment.

Yet guidelines for hybrid work are still messy. Companies from Humana to Google to PwC and JPMorgan Chase are still working on their policies. Some are establishing specific days for working at home; others are finding their conference rooms overcrowded (as they are now spaces for collaboration vs. meetings); and others are redesigning their offices once again (you may recall the big move to open office space vs. cubicles).² For the first time in a decade, companies have an opportunity to “redesign” work for an Internet-enabled, video-powered, global hybrid work experience.

Working at Home Is Not “Remote”

In view of workers, the word *remote* used to invoke isolation, distance, or seclusion. But the pandemic broke the stigma of “working from home,” which was often seen as code for “not working,” and taught us that it is okay. Now it is time to look at employee groups (as many as 75% of employees are “deskless”), come up with new policies, and focus on productivity, wellbeing, growth, and experience by design. As the job market gets even more competitive, employees will demand flexibility. Already the second most-common

“location” for jobs in LinkedIn is “remote,” followed only by “headquarters.”

We also know “remote work policies” are not enough to deal with the hybrid work model. Employees need support to reduce stress and overload. According to Microsoft’s Work Trends Index, meeting time has more than doubled since we all went remote, chats have increased by 50%, and email traffic has exploded. The same study finds that while leaders may be performing well, three out of five frontline workers are struggling and younger employees, new employees, and working parents are struggling even more.³ We need tools and strategies that make work easier, not just “more remote.”

Designing the Hybrid Work Model

Design is at the center of hybrid work. For example, Deutsche Telekom has created a CEO-driven program around design thinking across their HR and IT functions, resulting in a greatly improved work experience. However, this kind of program can’t be implemented without a mindset shift to operate from a people-first approach, building on human-centered leadership capabilities, which we describe in detail in our study on this topic.⁴ (For more information on Deutsche Telekom’s journey, view our video *Design Thinking in HR*.⁵)

Our research clearly says it is crucial to go forward, as hybrid work is here to stay. According to a study by McKinsey, while 99% of executives expected their workforce to be on-site more than four days a week before the pandemic, now most are planning to have them on-site between one and four days a week.⁶

The big question: How do we design a new hybrid work model that makes our organizations productive and healthy? There are three important considerations:

³ www.microsoft.com/en-us/worklab/work-trend-index

⁴ *Big Reset Playbook: Human-Centered Leadership*, Josh Bersin Research, April 2021.

⁵ www.youtube.com/watch?v=IDyIv3AcwI8

⁶ www.mckinsey.com/business-functions/organization/our-insights

¹ www.linkedin.com/pulse/hybrid-work-paradox-satya-nadella

² www.wsj.com/articles/if-you-thought-working-from-home-was-messy

1. Remember the hybrid work strategy may differentiate your company. It is therefore important to take an integrated approach, and engage senior leadership, HR, IT, and facilities in the process. Everything from culture to technology will matter.

2. Reflect on the idea that your hybrid work policy will become your employment brand. As the economy continues to grow, job candidates will want to know what it is like to work at your company. You will need to sell and communicate this policy openly, so design it carefully.

3. Make sure you listen and communicate well. Employees have gained a lot of power and agency over their work experience during the pandemic. They may not feel comfortable going back to the office commute quite yet. Setting a vision and communicating is critical. Employees who do not receive this kind of clarity are 2.9 times more likely to be burned out, according to a McKinsey study.⁷

In our [Pandemic Response Study](#), we looked at the practices of adaptive companies and found success requires more than just a focus on health and wellbeing. High-performing companies go a step further by reinforcing their company's mission and purpose, explaining how their reinvented business models operate, and creating cross-functional teams to foster change. Hybrid work is the next step in pandemic response, and companies need to leverage what they have learned, rather than consider going back to "the way things were" two years ago.

In this playbook, we go well beyond HR policies and procedures. We define new approaches to work, people practices, the workplace, and leadership, and this applies to every company, industry, and geography. This report covers all the learnings we processed from discussions with more than 400 business and HR executives around the world. Read more about the working groups and topics we covered in the Appendix and let us know if you want to join us.

⁷ www.mckinsey.com/business-functions/organization/our-insights/rne/

The Six Principles of Hybrid Work

Companies need a flexible framework for hybrid work design. Many companies went from office to remote and back again, depending on the ebb and flow of the pandemic. Ferrero, for example, was back in the office in shifts of three teams for each function between spring and fall of 2020; then it went fully remote during the virus surge over the winter, and now it is up to every employee to decide where they want to work. Meanwhile, the company continues to define their new ways of working.

Hybrid work is a future-forward design opportunity, not a "return to work" exercise. Simply repurposing legacy policies on remote work will not enable people to become more productive, healthier, and more engaged. We learned from all the discussions between hundreds of HR, EX (employee experience), and business leaders that this hybrid work design follows six principles (see Figure 1).

Principle 1: Define your hybrid work strategy.

Mission, purpose, and culture are powerful drivers of business, people, and innovation outcomes. Our Employee Experience Excellence study shows when companies make mission and purpose part of the work, they are 4.3 times more likely to meet or exceed financial targets and 4.8 times more likely to satisfy and retain customers.

Mission and Purpose

For hybrid work, your company's mission and purpose are critically important, too. How does the way we collaborate help accomplish what we set out to do? Do your customers need you to be in the same location?

RJ Milner, Head of People Analytics at Uber, says, "As we design the hybrid workplace, we consider what we are optimizing for. Is it teamwork? Innovation? Culture? The answers shape how we design hybrid work."

Figure 1: Six Principles of Hybrid Work

PRINCIPLE	KEY QUESTIONS TO ADDRESS
1 Define your hybrid work strategy. Outline how hybrid work fits into your mission, vision, and culture, and define a strategy / philosophy.	<ul style="list-style-type: none"> • What do our customers need? • What is our leadership model? • How do we retain culture in hybrid?
2 Create a measurement system. Define success criteria and outcomes for business, people, and innovation measures so you can stay on track.	<ul style="list-style-type: none"> • What are we optimizing for? • How do we know if we 'get there'? How will we listen to employees? • What measures and metrics do we need?
3 Operate in cross-functional teams. Facilitate design in cross-company collaboration between HR, IT, and more.	<ul style="list-style-type: none"> • How do we engage senior leaders in the process? • Who are the experts to consult? • How do we engage IT, HR, facilities, safety, legal, and management together?
4 Codesign with employees. Involve employees in the design and implementation, listen and learn from them. They are the customer of hybrid work.	<ul style="list-style-type: none"> • How do we get input on employee needs? • How can we listen and involve them? • Who are the personas and what are their journeys?
5 Consider the entire EX. Hybrid work is about the work itself, teaming, productive workplace design, DEI, people processes, learning, leadership, and culture.	<ul style="list-style-type: none"> • What do we want the new reality to look like? • What work processes, programs, policies, and tools do we need? • How do we create the EX for productivity, performance, engagement, and wellbeing?
6 Iterate and continuously improve. Experiment, iterate, learn what works and what needs to improve, then measure and expand.	<ul style="list-style-type: none"> • Where can we try on a smaller scale? • How will we get input? • Where can we expand? • How do we implement? • How do we communicate?

Source: Josh Bersin Research, 2021.

Collaboration

To understand what each group needs, first segment your workforce into different groups. For example, an engineering team might need small-team collaboration, in which case you need to bring together a work team in the hybrid world, designing their experiences with collaboration tools and platforms. Maybe the R&D team needs better cross-company collaboration. In this situation, you would need to design a different experience, one that intentionally brings together people from different parts of the company, no matter where they are.

Innovation and Cultural Experience

Adobe aims for innovation and a strong cultural experience (their Experience Platform makes this particularly important for them). To spur the creativity and innovation that comes from serendipitous encounters when people work face to face, e.g., the proverbial watercooler meeting, they use their own Adobe Live tool, a platform originally developed for creatives to share ideas and iterate.

Leadership

Lego didn't miss a beat when it went remote, continuing with its "leadership playground" along with their "campfires" (meetings anyone can attend, from the frontline worker to the company owner), which they did virtually. Now they do them in hybrid ways in which some people are remote, and others are face to face.

Working Appropriately

General Motors' CEO Mary Barra takes a simple approach to designing the new work model: Work appropriately. "The future of work is not a one-size-fits-all approach, and our values and behaviors will guide us in this culture change," Barra said. "Work appropriately means that where the work permits, employees will have the flexibility to work where they can have the greatest impact on achieving our goals." Each team works together to figure out what works best for them.

Hybrid work models, policies, and practices won't work well if you are porting them from one company to another. Your

company's hybrid work philosophy and strategy need to be tailored to your company's specific values and culture, and what it is trying to accomplish with its business.

Principle 2: Create a measurement system.

Using the guidance of your company's mission and values, you can start to define what really matters most to your company. You should first define what business, people, and innovation outcomes you need to accomplish, and then take a baseline measure so you know where you stand. You should think about a balanced set of measures to determine if you are going in the right direction. Financial performance and customer satisfaction are always important, but they might take a bit longer to be influenced by different work models. On the people side, here are some ways to evaluate your hybrid work progress (based on what you are trying to accomplish).

Employee Productivity

Measuring productivity can be tricky, but employees know if they are productive or not, so let them report on "perceived productivity." At Uber, self-reported productivity remained stable throughout the pandemic and at the same levels as prepandemic. But when people did not incorporate focus time into their day, productivity was much lower.

Performance

"In our company, we are often seeing that the employees who performed worst while working remotely are the ones who want to continue working remotely," said an HR executive. Measuring employee performance is sometimes tricky, because many companies don't trust their own performance management systems. PTC saw a huge discrepancy between manager and self-ratings (as much as 50%) when they started working remotely. Comparing performance levels to location (remote and on-site) will give you data to determine if it reflects actual performance or the proximity biases of managers, and if hybrid work works for your business.

Promotion Rates

Like performance ratings, identifying inequities in promotion rates of remote employees compared to on-site people will

help you determine trends and dive deeper to understand what may be behind imbalances.

Employee Engagement

Compare engagement levels of hybrid teams with those that are fully remote or fully onsite, and then factor in trends over time. Microsoft measures engagement with daily surveys in which they sample 2,400 employees, which also gives them insights into topics that are trending on people's minds.

Health and Wellbeing

Stress and burnout are a big concern in the pandemic. A study by Glint shows burnout levels are at an all-time high.⁸ "Zoom fatigue" and "collaboration overload" are now part of our vocabulary, and many companies tell us about "no meeting Fridays" or "video-free days." Designing for (and evaluating) the impact of hybrid work on health and wellbeing is critical to your employees' wellbeing.

Employee Satisfaction

Are people happy with the way they work, or do they feel it is not meeting their needs? Consider a net promoter score measurement to evaluate satisfaction over time, with remote work, in person work, and hybrid work settings, and compare them. Also, give people a way to suggest improvements so they can be more content with their work environment.

Collaboration

If you are aiming to increase collaboration across the company, you need to find a way to measure that collaboration has, in fact, increased. Uber, McKesson, and PTC use organizational network analysis (ONA) to evaluate the strengths of networks across team boundaries, identify siloes, and find ways to foster stronger connections. If hybrid work is designed in the right way, it should strengthen networks and collaboration over time.

Workforce Diversity

Hybrid work can be a powerful amplifier of diversity. When we open opportunities to everyone and not just to the few people who happen to live close to specific office locations, the talent pool increases exponentially, and with that the

⁸ www.glintinc.com/wp-content/uploads/2020

opportunities for much more diverse teams. Women opted out of the workforce in droves because they took the lion's share of housework. Now is the time to bring them back. It is important to measure the diversity of your workforce by gender, ethnicity, age group, caregiver status, and other criteria broken down by remote and onsite workers, and those that qualify as hybrid workers.

Inclusion and Belonging

Just because we can include remote and on-site workers into teams does not mean they will feel equally included. PwC is concerned about creating more inequities in their workforce as they move to hybrid work. Companies like Consumer Reports and Target are considering adding a new dimension of "remote" to diversity demographics to cut inclusion indices by this demographic together with others. Do your remote Asian women feel as included as your on-site white men? How can you create more inclusive work practices across location boundaries?

Psychological Safety

Many studies show that psychological safety, an environment where people can speak up and "be themselves," is foundational for performance and trust.⁹ PTC measures psychological safety as a foundation for business performance and provides training on the topic to leaders.

Retention

In this hypercompetitive talent market, retention is more important than ever. Measuring retention, or even intent to stay, in your employee survey with remote workers compared to on-site workers will give you great insights into whether your hybrid work design is working, and where to tweak.

Living the Values, Experiencing the Culture, and Understanding the Mission

If these are important to your company and its mission and values, you should identify ways to measure them, e.g., using frequent employee surveys, using text analysis to synthesize digital communication, or conducting focus groups.

⁹ *The Fearless Organization: Creating Psychological Safety in the Workplace for Learning, Innovation, and Growth*, Amy C. Edmondson / Wiley, 2018, www.amazon.com

The key is to first define your philosophy and goals for hybrid work and let these drive your success measures. Some of them might be harder to accomplish, but don't fall into the trap of just measuring what is easy. Measure what matters to you and your business for success of hybrid work.

Principle 3: Operate in a cross-functional team.

In the beginning of the pandemic, there was a move toward breaking down company barriers. It was an all hands-on-deck approach in which people rallied together to help others out and beat the invisible enemy, the virus. Then, in fall 2020, we identified "culture creep," falling back into legacy ways of thinking, behaving, and working, including old turf protection and siloes.

Hybrid work can't be designed by just one function or department. Instead, a cross-functional collaboration between many different departments across the company will make this new work reality a success.

Facilities and Real Estate

This department plays a big role because offices need to be designed more like collaboration hubs and less like cubicle farms. Sutter Health consolidated a lot of their administrative buildings in fall 2020, because they realized most people only wanted to come to the office two to three times a week, working remotely the rest of the time. Uber, Adobe, and Unilever include this group under the same executive as HR, so collaboration is easier, but even if the department sits somewhere else, they are both key to the success of hybrid work.

HR

As the group looking out for all things people, HR plays a significant part in designing remote work, with entirely new people processes, from recruiting and onboarding over performance management and learning and DEI, and new work processes like team and meeting management. HR is also accountable for policies around requirements for on-site vs remote work. Those HR departments that are orienting toward creating a great employee experience that fosters

engagement, belonging, and workforce productivity and performance are most prepared to take a leadership role in hybrid work. HR's role is described in more detail later in this report.

IT

The IT department also plays a critical role. This group also needs to be at the table because they provide the digital tools that enable people to work remotely, and companies need to double-down on data security and privacy. IT also looks across all technologies for data integration and maintenance, as well as support for any issues people may experience. While IT is an important contributor, tech-first designs often do not work very well because they miss the broader opportunities to transform work and prepare people for completely new ways of collaborating and connecting.

Legal

The legal team must be included in hybrid work design as well. Without a solid understanding around employment and tax laws, hybrid design teams can run the risk of inadvertently creating issues down the line.

Finance

Financial implications of hybrid work can be immense. Redesigning or consolidating office spaces to enable more collaboration, investing in new technologies that allow better connectivity, and creating robust data security programs are just some examples of why finance needs to be informed and play a role in decision-making.

Operations

Operations teams “own the work” of the people that now work in different ways, and therefore need to be part of the solution. Including line leaders, operations executives, and frontline employees in the design and implementation can make or break a hybrid work design.

The pandemic taught us how to work together effectively. When we needed to keep people safe from infection, quickly redesign workspaces for social distancing, and define new policies for keeping safe and healthy, HR and facilities worked together, as well as with IT, providing tools and resources

for remote work. It is integral to use this cross-functional collaboration when designing hybrid work solutions.

“Employees don’t care where a solution comes from, and they shouldn’t have to know if it’s part of facilities, IT, or HR,” said an HR leader from a Fortune 50 Consumer Company when we talked about their hybrid work strategy.

Integrating not just the design of hybrid work solutions but also the support services for hybrid working is critical to success. Unilever found that 20% of their calls to their eight different service centers were from people who were confused which number to call, so they consolidated these centers into one and used chat bots to direct people to resources to help them address issues themselves.

Within HR, various groups need to all work together to design a great hybrid experience. Sutter Health brings together L&D, leadership development, DEI, recruiting and onboarding, and HR services to define the new work model for 10,000 people who have this opportunity, and they do so in an agile way. “Business is evolving so fast that the need for agility is only going to increase as we move toward a hybrid workplace,” said Chris Casement, Senior Manager, Learning Innovation Team.

Principle 4: Codesign with employees.

Listening

In every study we do on pandemic response (Both DEI and EX), listening to employees is revealed as the most important practice. This is likely because when we listen to employees to understand their needs, the barriers to success they face, and the solutions they suggest, we are putting people first, and empowering them to drive their own performance forward. Listening can take many forms.

Active Listening

Active listening is present in annual and pulse surveys, open feedback sessions, “jams” (like IBM does), and focus groups. These kinds of activities are important because people want to feel heard and appreciated, and perceptions matter. Companies from AstraZeneca to Uber have increased their listening frequency in the pandemic, and people are keen to contribute. “We expected survey fatigue, but what we heard

Figure 2: The Evolution of Listening

Industrial Engineering	Employee Engagement	Feedback and Response	Design for Success
Focus: Output Observation Study Analysis Correlation	Focus: Retention Survey Benchmark Report Improve	Focus: Engagement Pulse Feedback Analytics Take action	Focus: Productivity End-to-end design HR, IT, facilities, safety Wellbeing and resilience Remove digital friction
Engineering Approach	I/O Psychology Methods, Surveys	Service Centers Rapid Response	Work Design Job Design
1900s	1930–1980s	1980s–today	Today Forward

Source: Josh Bersin Research, 2021.

from employees was that they actually want to be asked more because they know we will hear them and take action on the insights,” explained RJ Milnor, Head of People Analytics at Uber.

Sutter Health asked employees how often they wanted to be in the office and found out that most of them were looking to spend two to three days a week in the office to collaborate, innovate, and ideate, with the rest of the week spent as “heads down work” remotely. Now the company is rethinking their office environment to make it much more conducive to this kind of work.

Passive Listening

PTC uses ONA to understand how work gets done, where people are working together, who is isolated, and who might experience “collaboration overload.” Using ONA for these purposes can help guide leaders in having more meaningful conversations. “We want leaders and teams to be intentional about the activities that happen on days people are in the office,” said Jenn Smithwood-Green, Principal of Organizational Development at PTC. Microsoft and IBM add text analysis to their listening, identifying patterns in communications to get a full picture of the kind of collaboration that resonates most with people.

Design Thinking Processes

The workplace began to change when leaders realized workers were people with emotional needs, when “human

capital” came to represent the individuals who affect economic growth. As a result, companies needed to evolve their listening skills (see Figure 2).

Hybrid work is a rapidly changing situation. People will constantly bring up new ideas, issues, and suggestions. Organizations need to listen to their people regularly and create open channels for conversation. Listening is a key skill in design and business. Good designers are often good listeners as they want to understand their customers before they start to solve their problems.

That is why companies are starting to involve their employees directly when designing their solutions. Deutsche Telekom now uses design thinking for all their HR solutions, with 600 design projects underway. When prototyping, testing, and iterating solutions, they use the voice of their employees, and it has resulted not only in a significant increase in employee satisfaction and engagement but also in business performance.

Personas

Employee personas need to be part of this design process. For example, think about the employee groups for which you are designing hybrid work solutions. A salesperson will need a quite different hybrid work experience than a software engineer, and a PR specialist has different needs from somebody working in R&D.

Microsoft thinks about the personas in view of the problem it is trying to solve. For example, for a leadership development program, the company considers the different levels of leadership, while if it is trying to solve for a learning experience, personas are then created around different capability levels. For hybrid work, the work itself and different job groups, are the most important criteria.

Journey Maps

Journey maps outline the “day in a life” of each of your personas. What does it look like if your salesperson works remotely on a Tuesday? How does she connect with customers? How does she get updates on the latest product features? How does she work with other salespeople to develop a proposal? How does she get coaching on her sales capabilities? You need to talk to your employees to define these journey maps as they are the only ones that understand their jobs and corresponding responsibilities and necessary activities throughout their day.

Employees as Customers

Employees are the most “vested stakeholders” you have. Unlike customers (who can switch suppliers) or investors (who can sell their stock), employees vote with their lives to work for you. They put their family earnings, time, and personal energy into your company. So, when they have problems or good ideas, you really must listen.

The mindset shift necessary for organizations to treat their employees as customers is possibly the most important factor for the success of business outcomes. That is why HR must become “experience designers,” making it clear that their employees are worth designing for. Without an agile design that really makes sense for your employees, your hybrid work approach may be perceived and experienced as a collection of disjointed policies and tools that add no value to the way employees really work.

Principle 5: Consider the entire employee experience.

Hybrid work has become a very broad topic, spanning many different issues and concerns for both employees and employers. It includes the entire employee lifecycle (from onboarding to learning and development, performance

management, and promotions to leaving the company).

In designing a hybrid work approach, organizations must consider both the physical and digital workplace, and management and leadership practices will need to be newly defined. Health and wellbeing support, growth opportunities, and trust in the organizations all factor in, as well as the many different tools, technologies, and services that are necessary to implement a successful reality.

High-performing organizations define the hybrid employee experience holistically, not piecemeal. Our Employee Experience Framework (validated by our Employee Experience Excellence study) can help organizations think through all the elements and dimensions of hybrid work (see Figure 3 on page 10).

Meaningful Work

Implementing work design in the hybrid world does not simply require an extension of remote working into the future. It is a gigantic topic that requires a lot of consideration and thoughtful analysis of how your organization works.

Job and Values Fit

At its core, recruiting and talent acquisition aims to find the right job/person fit. “Offering hybrid work helps broaden the talent pool significantly. People might be open to a much longer commute if they only have to do that commute a couple of times a week, not every day,” a talent acquisition leader told us.

However, how do you assess how ready a person is to work in a hybrid way, especially when hybrid work processes are not even established? We can learn a lot from how people show up in the interview process. If they are comfortable navigating the virtual and on-site environment, that flexibility will also be useful when they join.” Dow uses an expertise index showing a correlation between expertise and safety levels. People are considered assets and assessed periodically throughout the year for critical skills.

Autonomy and Agency

Employees are demanding flexibility, and a hybrid work model seems to fill the bill in this respect. Employees need autonomy and agency over their work and career, which includes decisions about where to work. Sutter Health, PTC, and Ferrero all empower their employees with that choice.

Figure 3: The Irresistible Organization (Employee Experience Framework)

 Meaningful Work	 Strong Management	 Positive Workplace	 Health & Wellbeing	 Growth Opportunity	 Trust in the Organization
Job and values fit	Clear goals with stretch opportunity	Tools, processes and systems to get work done productively	Safety and security in all aspects of work	Open, facilitated job and role mobility	Mission and purpose beyond financial goals
Autonomy and agency	Regular coaching and feedback	Appreciation, recognition, and rewards	Personal fitness, health, and physical wellbeing support	Career growth in multiple paths	Transparency, empathy, and integrity of leadership
Agile teams, supportive coworkers	A focus on management development	Flexible hours and workspace	Psychological and emotional wellbeing and support	Many forms of learning as needed	Continuous investment in people
Time to focus, innovate, and recover	Transparent, simple performance management	Inclusive, diverse, and sense of belonging and community	Family and financial support	A culture that supports learning	Focus on society, environment, and community
Technologies and Services					
<i>Foundation (Security & Access) Support Systems Insights Apps Talent Apps Communication Apps Work Tech</i>					

Source: Josh Bersin Research, 2021.

Herc Rentals expected more physical presence from their executives than from their line employees because they feel senior leaders need to be role models for their culture. But the pandemic has redefined those expectations as organizations have learned employees can be more productive if they are freed from commutes and rigid work hours and can adapt their life activities with work commitments.

“The future of work is flexibility. Look forward to continuing the conversation with all of you,” said Sundar Pichai, CEO of Google and Alphabet, in a letter to employees.

Agile Teams

Much of our work is done in agile teams that quickly form and disband, focused on accomplishing specific milestones and results. For example, RELX helps new hires assimilate into teams quickly with remote onboarding and with “Tea, Toast & Teams,” a weekly informal, virtual meeting hosted at the team level. Uber and PTC use network analysis insights that show connections between team members as part of their team design, informing team members how to collaborate better.

Time to Focus and Innovate

Designing hybrid work with “focus time” is especially important. This approach might replace “Zoom-Free Fridays” with “No Meeting Mondays” as the organization figures

out how to best distribute work between focused time and collaboration along with remote work and in-person meetings. Uber found that building focus time into the workday resulted in a threefold increase in productivity. Microsoft studies found similar insights.

Designing meaningful hybrid work is not a policy issue. Work design should not be tackled as a one-size-fits-all scenario. It is a highly tailored and personalized activity. Team members and team leaders can apply guidance and tools provided by the company to their implementation, and then iterate and improve.

Strong Management

Hybrid work requires a different set of manager skills and capabilities, which companies need to develop.

Clear Goals

When we all went remote in 2020, many companies focused on setting clear goals to help employees prioritize and create work-life balance. Yet, a study by Gallup shows that nearly half of the U.S. workforce starts their day without being clear on what they should accomplish.¹⁰

10 www.gallup.com/workplace/341894/measure-performance-strategies

Our Employee Experience Excellence study shows companies that have managers who help employees tie their work to organizational priorities are 6.2 times more likely to have high engagement and retention and are 8.2 times more likely to adapt well to change.¹¹ PTC builds a discussion about goals into their performance conversation model and helps managers intentionally plan for those in any work setting.

Regular Coaching and Feedback

Acting like a coach is the hallmark of human-centered leadership, and many companies continue to hone managers' coaching and feedback capabilities. McKesson, SAP, and PTC use Cultivate, an AI coaching tool, to nudge managers to ask more open questions and give better feedback to their team members. Autodesk uses BetterUp to give people human coaches. Sutter Health guides managers to work more empathetically as part of their new leadership behaviors. Ferrero is encouraging managers to get a coaching certification.

Focus on Management Development

Studies and real-life experience have shown managers play a pivotal role in the move to remote work, and now in transforming to hybrid work. As a result, companies are focusing more on management development. Ferrero added "managing distractions" to their list of tactical courses on remote meetings for managers as well as provided programs and resources that cover learning about trust, collaboration, and empathy in a hybrid world.

Sutter Health launched their "Practice of Leadership" portal that offers both bite-size and deep-dive learning opportunities for managers on topics like influencing from a distance, remote collaboration, reading body language virtually, and supporting team members' wellbeing. CoorsTek moved their 12-month leadership development program online, and now focuses on the mindset shift for managers to lead in a hybrid world.

Transparent, Simple Performance Management

Performance management has been a substantial area of disruption. Our Pandemic Response study shows companies

who transformed their performance management practices had much higher customer satisfaction, engagement, and financial performance.¹² PTC focused on an approach that highlights coaching and feedback, not ratings or competition. Autodesk now includes proximity in their diversity criteria, reviewing performance ratings, pay, and promotion for proximity bias.

Managers at all levels are critical in supporting the move to hybrid work, and companies that design for resources and tools to help employees in their new roles will be much better prepared for constantly changing realities.

Positive Workplace

This is the moment in the sun for the workplace. Uber, Sutter Health, and Google are all reimagining the physical workplace to make it more conducive to the kind of work people want to do there: collaboration, ideation, and innovation.

Tools, Processes, and Systems

Throughout the 15+ month-long practice of remote work, many of us have become proficient in using our work tools remotely. But we also need to redefine work processes to remove friction in a hybrid world. Are there enough conference rooms? How do you know where your coworkers will meet up? How do you reserve a space? New workplace management tools make this much easier. Consulting companies have used these systems for decades to facilitate "hoteling," which is now mainstream for the hybrid workplace.

Appreciation, Recognition, and Rewards

Our Employee Experience Excellence study shows the vital importance of fair and equitable rewards and recognition. Leaders are studying how to embed a culture of appreciation into the new hybrid environment as celebrating and acknowledging performance will be critical for engagement and morale. Companies use peer recognition programs like Achievers or Reward Gateway to foster collaboration and great teamwork. A Reward Gateway study shows using peer recognition together with manager recognition increases the likelihood of high financial performance by 36%.¹³

11 Employee Experience Excellence study, Josh Bersin Research, 2021.

12 Pandemic Response/Business Resilience study, Josh Bersin Research, 2020

13 www.rewardgateway.com/pillar/definition-of-peer-recognition

Flexible Hours and Workspace

Flexible hours and workspace define hybrid work for many workers as it provides the flexibility to decide when and where to do one's best work. Over 70% of workers look for increased flexibility.¹⁴ Autodesk reimagines the workplace with two primary goals: building flexibility into its workspace and continuing to build a culture that emphasizes trust and belonging. They plan to offer three workspace options for employees: office-based, hybrid, and home-based.

Microsoft's hybrid work [playbook](#) spells out specific policies for hybrid work and flexible hours for managers within the company framework, and to support others, they made it "open source." Clorox thinks about "flexibility within a framework," providing guardrails, while GM just wants their people to "work appropriately." Uber and Sutter Health are redesigning their workspaces to facilitate high-value in-person interactions on office days, giving equal attention to activities for remote-only workers.

Inclusive, Diverse, and Sense of Belonging and Community

Diversity, equity, and inclusion considerations are vital to hybrid work design. While hybrid work opens the talent pool more broadly, especially if all roles can also be done remote-only, equity and inclusion need to be intentionally built in, monitored, and constantly improved. Target, Uber, and Consumer Reports now build "proximity" as another dimension of intersectionality in their analytics, and monitor pay, promotion, and development opportunities for equity.

Our DEI study shows high-performing companies use inclusion metrics and communicate them broadly to employees. Consumer Reports saw a big shift in perception of DEI from an HR program to an operational business necessity when they put DEI measures on quarterly business updates for all employees. The new human capital disclosure rules provide another opportunity to highlight a focus on inclusion of all employees regardless of work location. Read more about the real story of diversity and inclusion in our [Elevating Equity Study](#).

¹⁴ www.microsoft.com/en-us/worklab/work-trend-index/hybrid-work

When the digital, physical, and cultural workplace is effectively designed for hybrid work, employees and teams will be much more prepared to contribute their best work for continued organizational success.

Health and Wellbeing

Safety and Security

In our Pandemic Response study, we identify a focus on holistic health and wellbeing as one of the three key dimensions of excellence. With stress and burnout at all-time highs, and the dangers of the pandemic still looming around the world, health and wellbeing in all forms must continue to be a boardroom priority.

Safety and security in all aspects of work are a given focus now. If the pandemic taught us anything, it's the importance of keeping employees safe and infection-free. S&P Global uses a workflow management system build on ServiceNow to verify all people entering a building (employees, leaders, contractors, even visitors) are symptom-free, integrating with meeting facility management systems to track contacts and notify people who may come in contact with somebody who tests positive.

Chief health officer roles emerged in many companies, sometimes even combined with DEI accountability because people's health is directly impacted by their feeling of belonging, and their mental and emotional wellbeing. For hybrid work, this means seamlessly balancing the remote work and the onsite work safety and security issues, whether that's infection protection on site or digital data security for remote work.

Personal Fitness, Health, and Physical Wellbeing

Hybrid work design also touches on our physical health and wellbeing. When their offices closed, RELX supported their workforce with nutrition, exercise, and mental health programs. Steve Jobs famously conducted walking meetings decades ago, resulting in innovative ideas and transformation. Once people are in person again, these types of meetings can spur collaboration while also helping people exercise more.

Many companies give employees subsidies for gym memberships, fitness expenses, or subscriptions to walking apps, provide healthy food in meetings, and more. The head of HR at a Bay Area fintech startup told us they are now considering meal services for their employees who will be remote more because they make worse food choices, in turn causing lower productivity, higher absences, and increased healthcare costs.

Psychological and Emotional Wellbeing

With Zoom fatigue and collaboration overload weighing heavily on us, hybrid work design must focus on psychological, emotional, and mental wellbeing support. When we are burnt out, we can't listen well (and all our studies show how important that is) and can't provide great customer service. "There's been a recognition that the 'always on' of being remote has been a challenge, especially while schools were closed," said Lynne McCormick, Head of Organization Effectiveness at RELX.

Deutsche Telekom, Reliance Industries, and many others doubled down on mental health support during the pandemic. Now, in view of hybrid work design, we need to make a conscious commitment to bring forward the positives that were revealed from full-remote and build in a focus on reducing stress, helping people balance their workloads, and training managers to identify signs of burn out. Tools like Unmind, Microsoft Viva Insights, and Cultivate nudge us when we are always on and encourage us to take a step back and take a breath.

Family and Financial Support

In our Pandemic Response study, we identify that focusing on family and financial wellbeing support is one of the most impactful drivers of overall business outcomes, as well as business resilience.¹⁵ Companies around the world tell us they are helping people with caregiving commitments, organizing remote movie nights, and even pitching in to help people who need childcare. Sabre opened up their offices in Texas to employees and families without heat or power. "This would never have happened before the pandemic. It shows how empathy and caring has been elevated," said Eric Paul, VP Global Talent Management at Sabre. Hybrid work acknowledges that we don't let go of our family commitments

when we "go to work," allowing people to integrate their work and life appropriately.

Health and wellbeing are now business differentiators and have crawled out of the boardroom to become a board room priority.

Growth Opportunity

Learning and growth continues to be a key driver of employee engagement and retention, and more learning will continue to be online, in fact, 70 to 90% according to some learning leaders.

Open, Facilitated Job and Role Mobility

Mobility is no longer reserved to high potentials or executives in succession management processes. A study by Eightfold shows large global companies now fill between 50 and 80% of their roles from within the organization. Not only does this increase engagement but also it is a necessity in a highly constrained talent market. Bank of America finds that the strongest predictor of customer satisfaction is employee tenure. Their academy for sales and customer support people is a highly engaging experience designed with in-person and remote learning opportunities, designed for the new hybrid world.

Career Growth in Multiple Paths

When employees have access to career growth in multiple paths, they perform better and can drive their own career forward. In a hybrid world, we need to design using a combination of in-person programs including high-value learning experiences to build power skills and remote learning for technical and functional skills. Walmart, Target, and Disney all design career pathways for their frontline workers using Guild to combine certificates, formal education, and practical application in the work setting to move people from one area to another. As a result, retention is a lot higher, and performance improves as well.

Many Forms of Learning

Learning need to be redesigned for hybrid working, and managers play a key role.

Our Pandemic Response study shows that learning in networks and community is especially important. While doing this remotely was challenging, bringing together both remote

¹⁵ Pandemic Response study, Josh Bersin Research, 2020

and in-person seamlessly is even harder. “We want leaders and teams to be intentional about the activities that happen on days people are in the office,” said Jenn Smithwood-Green, Principal Organizational Effectiveness at PTC, suggesting that certain trainings, whiteboarding sessions, activities focused on team forming and cohesiveness, or kicking off a collaborative project across teams be reserved for in-office days.

RELX employees rated virtual learning more effective than in-person, so the company plans to maintain the online format even after offices have reopened. How do you put “learning in the flow of work” when that flow might be either remote or in-person? Understanding workflows is critically important, so we can be thoughtful about incorporating learning into support systems seamlessly. Technologies like Viva Topics and microlearning nudges from companies like Mindmarker can help. Walmart has been using immersive learning (virtual and augmented reality) for years, using Strivr to train people for the vast customer support needs of Black Friday sales. For more details, read our guide on how to design immersive learning.¹⁶

A Learning Culture

A culture that supports learning is crucial for success in a hybrid world. In our Employee Experience Excellence study, we show that many companies still expect learning to be done outside work hours, adding to an already overfull workday. During the pandemic, we learned that spaced-out virtual learning sessions with built-in reinforcement works much better. Instead of returning to the old paradigm of in-person learning, we need to design programs that facilitate virtual interactions and model how hybrid work can be successful and fit employees’ needs.

Companies that reward and recognize learning, including taking smart risks and learning from mistakes, will continue to be more prepared for the new hybrid reality. Sutter Health used agile principles and design thinking to develop learning programs to implement advanced care-planning discussions in a telehealth environment in just two weeks, which would have normally taken two to three months at an earlier point in time. Chris Casement, Senior Manager, Learning Innovation &

Technology Team, said, “Business is evolving so fast that the need for agility is only going to increase as we move toward a hybrid workplace.” TruckStop.com uses “high tech and high touch” learning, demonstrating to employees that learning is valued from Day 1 with new hire orientation.

Trust in the Organization

According to our Employee Experience Excellence study, trust in leadership has a disproportional impact on employee engagement and other business outcomes. When people trust the company and leadership, they provide better customer support and accomplish better financial results. Everybody wins.

Mission and Purpose Beyond Financial Goals

Having an inspiring mission and vision beyond financial goals has been shown to have a big impact on employee performance, productivity, and engagement. When we know that what we do matters to others, we put in extra effort and find ways to add value to customers. In a hybrid world, companies need to double-down on that mission and vision and use it as a guidepost to define what works for the company. Autodesk’s culture code emphasizes trust and belonging and makes sure that everybody is focused on their mission and vision, creating learning pathways for leaders to help them live these values.

Transparency, Empathy, and Integrity of Leaders

Companies now see transparent leadership as a bedrock of trust, and with it, the ability to listen and the vulnerability to fail—or just admit “we don’t know if this is going to work” or “we didn’t get it quite right the first time.” The recognition that “we are all adapting as best we can” strengthened a muscle of resilience that will serve organizations into the next phase of hybrid work.

Leaders can demonstrate vulnerability and their willingness to admit mistakes and adjust course accordingly. From Microsoft’s Satya Nadella to GM’s Mary Barra, CEOs who talk about hybrid work as a work in progress and readily admit that nobody has yet written the book about it, and that each company needs to find their own way, inspire employee trust.

¹⁶ *A Guide to Immersive Learning*, Josh Bersin Research and Strivr, June 2021

Continuous Investment in People

This people-first approach treats people not as a cost factor to be controlled but as the most appreciating asset: the more you invest, the more the company gains. In hybrid work, this could mean providing new tools and technologies to support this new way of working, supporting skill-building for navigating the new reality, or doubling-down on building culture in the new environment.

Google invests heavily in redesigning the workplace, equipping offices around the world for a seamless, hybrid world and adding more office locations to ease the pressure of commutes. Sutter Health, Deutsche Telekom, and many others told us they invested in technology to enable people to work remotely in the pandemic.

Now, as we continue hybrid work, creating “technology parity,” supporting employees to have a great experience, regardless of their physical work location, is a basic requirement. Indeed, 48% of North American organizations are investing in peripheral devices like headsets and video cameras, and 96% are investing in team collaboration solutions, 95% in management and security of endpoint devices, 90% in videoconferencing solutions, 39% in device upgrades, and 32% in mobile connectivity.¹⁷

Beyond technology investments, companies that also pay attention to amplifying the culture in hybrid work and helping employees and leaders develop the skills to navigate this new world will be much better prepared.

Focus on Society, Environment, and Community

Providing people with a safe place to work together in-person while also giving them flexibility can pay off for society overall. A study by Lucidspark shows one in five workers had broken their company policy to work together in person during the pandemic, and these policies have been put in place to protect workers and their families and friends from infections.¹⁸

The environmental benefits from hybrid work, too, because workers can decide when to come to the office, can carpool more effectively, and work remotely if traffic is bad, for example. Some companies also rethink their real estate footprint, and instead of occupying few massive buildings with a majority of their people commuting up to an hour or more,

they are now investing in smaller satellite offices all designed for collaboration. Less commute miles mean less pollution. And expanding opportunities in communities that might not otherwise have access to great jobs will decrease wealth disparities over time. For example, Humana, headquartered in Louisville, Kentucky, not a top destination for top talent, has been able to attract and retain leaders and top talent by offering a remote work model.

Technology and Services

The pandemic has put workforce technologies front and center of attention, not just for the IT department but also the entire C-suite. While the prepandemic world allowed leaders to avoid using any of the technologies their workers used daily (some were known for having an executive assistant print out emails, so they didn't have to read them on their computer), now everybody from the summer intern to the CEO had to learn to use video conferences, remote collaboration tools, and other work systems without any in-person help.

Security and Access

Foundational to all technology investments are security and access. With so much data now in the Cloud, the office shredder is no longer enough to keep your data safe and secure. About 64% of IT leaders prioritize security features when selecting new work management tools.¹⁹

Communication Platforms

Communication platforms like portals from companies like Microsoft Viva and Dynamic Signal help people get messages out to people in real time, in whatever format in which they engage. These new communication tools are much more than simple, one-way portals. Instead, they include two-way communication features and engaging videos and podcasts to make the content more useful. In the hybrid world, these kind of tools become especially critical. For example, if your office-based people get news about the company in the elevator screen, double- up on these communication platforms for those who might not come to the building.

Hybrid work at its core is about making collaboration, both synchronous and asynchronous, effective and engaging across different work settings. Video platforms like Zoom, Microsoft Teams or Webex and communication platforms like email or

¹⁷ www.s24.q4cdn.com/511786472/files/doc_downloads/2021

¹⁸ www.lucidspark.com/blog/report-collaboration-and-creativity-during-covid

¹⁹ www.wrike.com/blog/wrike-research-technology-power-hybrid-work/

chat (whether you use Microsoft, Google, or other systems), together with Slack, Microsoft Teams, or Yammer, are already a given, but now companies like Microsoft add insights to those tools to enable users to see how meeting and communication behaviors are impacting people in other time zones (e.g., a pop-up may tell a user it's after work hours for some people, suggesting postponing the email). Microsoft's Focus Time feature puts blocks of time on the calendar to enable users to focus, rather than have a meeting, and then it reports in on how the user did in keeping those times for focusing. In hybrid work, this will be especially important. For example, a team could agree on common focus times and work remotely those times.

Then there are various whiteboarding apps, asynchronous project management tools like Asana, Monday, or Wrike, and the list goes on and on. Some companies even experiment with next-generation collaboration tools like Virbela and Bramble that don't just let you see people via video but send your avatar to meet with them and experience interactions with virtual and augmented reality. Innovation in this area is impressive, and we expect more to come there.

Knowledge Management

Knowledge management, once a boring document management discipline reminiscent of online file cabinets, is now coming into the flow of work, just like learning, with Microsoft Viva Topics automatically organizing content and expertise across the organization, making it easy for employees to know who the experts are, find information, and put it to work.²⁰

People Analytics

Then there is the enormous market of people analytics, from all the listening applications like Perceptyx, CultureAmp, Glint, Medallia, Quantum Workplace, and Peakon, as well as network analytics providers like Humanyze and TrustSphere that reveal how people work (regardless of work location). There are AI coaching apps like Cultivate that digest digital behaviors and provide tips on how to improve relationships, letting team members set preferences for when they want to be in the office, so employees can choose what collaboration days are best for the team. ONA solutions like Humanyze and

TrustSphere help you see who collaborates most with whom, which in turn can help decide which teams should have the option to colocate in an office location. If you want to really understand what's going on with your people in this new hybrid world, you need to invest in a solid people analytics tech infrastructure and organizational capability.

Learning Technologies

Many learning technologies, from your LMS over LXPs to learning content providers and even AI tools, form an entire learning tech infrastructure, and all of them are geared toward hybrid learning because they capture both digital and in-person learning. For effective hybrid learning to become a reality, it needs to be curated for your people, so they don't need to figure out what learning to do in which format.

Work-Tech Infrastructure

The work tech infrastructure for your hybrid work design is a big and complex topic, and you need to collaborate across IT, HR, and other groups to make it a successful reality, while at the same time listening to your employees to understand their needs and requirements. Walmart now plans to give each employee a smartphone, a huge investment with close to a million devices because their work tech needs to work anywhere, anytime. Whether it is a project management tool like Wrike or Monday, a sales management tool like Salesforce or Hubspot, or a spreadsheet solution from Microsoft or Google, they all need to work wherever the employee may be.

Principle 6: Iterate and continuously improve.

The world of hybrid work feels like an uncertain future. And after more than a year of what seemed to be a never-ending cycle of change in the ways and places we get work done, it is difficult to estimate the permanence of this next phase. To succeed, leaders must be prepared to experiment thoughtfully and safely to implement hybrid. Tim Ryan, U.S. Chairman of PwC, puts it this way: "We'll make a lot of little mistakes, I can promise you that."²¹

Rapid iteration and continuous improvement will be crucial for success. Companies cannot afford to wait or get stuck in

²⁰ www.microsoft.com/en-us/microsoft-viva/topics/overview

²¹ www.wsj.com/articles/if-you-thought-working-from-home-was-messy

an endless pursuit of perfection. Instead, we must adopt agile techniques such as cocreation, rapid deployment of flexible solutions, and sensing and responding quickly to change.

As said earlier, listening came up as the most important and impactful of all practices we studied during the pandemic. Listening helps with productivity, inclusion, diversity, and employee retention, which are all critical to the hybrid work model.

At Ferrero, for example, they have adjusted their approaches regularly as they continued to listen and learn. Office employees began working in week-long shifts, with the workforce divided into thirds to adhere to safety protocols. When the second wave hit, the company retuned their strategy based on employee feedback and engagement metrics. Today, Ferrero has made on-site work voluntary but will continue to monitor and measure the voice of their employees to change again as needed.

Reinventing Worksites and Offices

Before the pandemic hit, many organizations viewed the office as the place to get work done. Now, after a year of remote work, companies are shifting their perspective. Office spaces that sat unused for months are being reimagined with flexible, adaptable collaboration spaces that are considered as places to connect, share knowledge, and innovate together.

Steelcase, an office furniture design company, suggests leaders explore small ways to make changes in worksites that generate safe, social energy. According to their research, over half of global businesses plan to pilot new spaces in their offices this year. The designers say that looking at a company's café is a great place to start, to create a small social hub. The Learning and Innovation Center in Grand Rapids is doing just this, experimenting with flexible furniture elements that can be easily redeployed as the hybrid work experience evolves.

The Role of Managers and Leaders in Implementing Hybrid Work

As hybrid work is shaped and reshaped in companies, midline managers will play a pivotal role in communicating and sustaining the newest practices to frontline employees. Managers will need a new set of skills and capabilities in

the hybrid workplace. Farsighted companies are focusing on upskilling and coaching middle managers on how to be human-centered leaders who can effectively lead teams in and out of worksites.

At Sutter Health, for example, a direct request from a manager on how to effectively lead his team virtually brought this requirement into sharp relief. The senior manager of their learning team shared, "We understood we would have to build managers' skills to successfully lead in new work environments." The company built a comprehensive learning portal to offer their people managers multiple channels and formats to strengthen their skills in areas like influencing from a distance, remote collaboration, and reading body language virtually.

There are several ways that managers will need to think differently in the hybrid world. Managers will need to completely rethink how they communicate with hybrid teams. This means going deeper than ever before, communicating on different channels, and listening actively to every person. Companies can help enable this deeper communication with the right tools and technologies that connect remote and on-site workers, like Slack, MS Teams, Google Workplace, and Zoom.

Creating Fairness

Managers also need to create fairness so all team members can contribute equally, regardless of location. A recent article in *Harvard Business Review*²² looks at two dimensions that managers must be aware of: *hybrid positioning* and *hybrid competence*. Hybrid positioning is defined by the authors as the location where an employee is at any given time, and how that impacts their influence and access among peers and with their manager.

On the flipside, *hybrid competence* refers to the unique differences of our team members. "Not all individuals are equally skilled at operating in a hybrid environment." The authors go on to note that hybrid work requires employees to navigate seamlessly between what may be extremely different work environments to be successful.

²² www.hbr.org/2021/02/making-the-hybrid-workplace-fair

Psychological and Physical Wellbeing

We know educating managers in new ways of working and leading will not be enough. Companies must also take care of their managers' psychological and physical wellbeing. As we discussed in our last Big Reset report, human-centered leaders need to understand and care for their own health so they can then care for their teams.

As an example, Zebra Technologies created a program with their EAP provider to help managers recognize symptoms of burnout in themselves and their direct reports. Wave Financial is continuing to invest in manager mental health supports. And at Sabre, multiple leadership programs created quickly during the pandemic have evolved into a powerful peer coaching forum for managers around the globe.

Company Culture

As employees continue to express varying levels of fatigue and fear, implementing hybrid work will also force us to talk about company culture. This is because there is no "management by walking around" anymore. Culture is created through work practices, management behaviors, reward systems, and how much flexibility you provide.

But there is more work to be done here. Indeed, according to new research by IBM, one in five employees say their employer has not actively engaged with them to communicate or discuss options regarding their return to the workplace. And more than half believe their employer is more concerned about the company's public image than employee wellbeing when making decisions about reopening.²³

It will be up to leaders to acknowledge and address the needs of the workforce. One CHRO we spoke to put it this way, "This is the biggest change management challenge we've ever faced."

HR's Role in Hybrid Work

HR is poised to play a heroic role when it comes to hybrid work design and implementation. As companies grapple with decisions about excess real estate and new office setups,

²³ <https://www.ibm.com/thought-leadership/institute-business-value/>

workforce health and resilience, and accelerated digital and business transformation, talent leaders are essential to the conversation.

Before the pandemic hit, it was already clear that HR was ripe for reinvention. Between business model disruptions, powerful new technologies, and industry transformation, forces were pressing companies to rethink their people practices. In fact, in a study we conducted before the pandemic, nearly three quarters of HR executives agreed strongly that the function had to evolve to support their business. And we found widespread agreement about what the future of HR should look like: employee-centric design, tailored service delivery, and intentional experiences.

But getting to this vision was still happening slowly. Only 10% of global companies told us they were living the reinvention of HR in 2019, where the function performs as an agile, consulting organization with employee experience at its center.

Employee Experience Takes Center Stage

Over the last year, however, the pace has changed dramatically. In our Big Reset conversations with hundreds of global HR leaders, nearly everyone has shared that the pandemic has compelled them to hasten the transformation that was already underway in the people function. One CHRO in a Canadian financial institution put it this way: "The pandemic catapulted our HR department forward ten years in twelve months."

Today, leading HR executives and their CEOs are laser-focused on employee experience, but in more holistic and strategic ways than ever before. AstraZeneca, for example, takes a three-tiered approach to designing employee experience, considering the whole employee in the context of digital, work, and culture. Unilever's experience team sees themselves as "experience makers." And at IBM, the group responsible for employee experience is a cross-functional team that also looks at customer experience and is accountable to the CEO.

Agility and Design Thinking

Essential to becoming an employee-centric function is the need for agility and design thinking. HR must be able to engage differently with the workforce. Building up agile and design thinking capabilities and then applying those new skills to better understand the workforce is key.

This means considering the employee as a customer, having empathy for the employee, and not being afraid to iterate on design. Traditionally, HR has worked to perfect the solution and put it out to the organization, but HR leaders need to break down those boundaries and co-create solutions with employees.

At Deutsche Telekom, design thinking is the basis for all HR projects. According to the head of HR Development at the company, “Design thinking helps us better understand a problem and design a potential solution that is more user-friendly and user-oriented.”

Conclusion and Next Steps

The first half of 2021 has gotten off to an optimistic start. Vaccines are rolling out across the world, economies are rapidly reopening, and families are reconnecting with loved ones. The lessons from the 2020 have left us all with new levels of appreciation for the value of human connection, equity, and belonging in our work and personal lives. As we recover from the global pandemic, every organization is rethinking work, the way we support our people, the role of technology, and the new role of leadership.

One theme is clear from our Big Reset conversations this time around: As we step into hybrid work, we must seize this opportunity to truly design a new paradigm. Whether we are discussing the shape and feel of offices and worksites or the experiences of our employees at work and home or the new ways we serve our customers and clients, this is not a matter of going back but instead *a chance to move forward*.

HR will continue to play a giant role in shaping and supporting this new approach to work. CHROs and people leaders around the world are looking ahead to help their companies chart a path to growth in a safe and productive way and writing the book on what the future of work will look like.

Case in Action: Autodesk Focuses on Trust and Belonging to Prepare for Hybrid Work

Autodesk makes software for the architecture, engineering, construction, manufacturing, media, and entertainment industries. With more than 10,000 employees around the world, the company adapted quickly to working from home.

In 2020, adaptive responses included the implementation of a new LXP and the development of learning pathways for resilience, mindfulness, and leadership. The Learning and Organizational Development (L&OD) Team was tasked with ensuring that everyone was equipped to get the most out of technology for virtual work as well as supporting managers in staying connected with employees.

The positive discoveries of the full remote work environment included upskilling in technology and communication through an equitable approach to sharing in virtual meetings, which in turn elevated more voices. In a year in which it hired 2,700 people, Autodesk was able to expand its talent pool across geographies and provide greater work-life flexibility for those with family concerns.

To support the growing workforce, L&OD quickly revamped their new employee onboarding (NEO) experience to make it global, consistent, and interactive. Emphasizing active engagement of new employees, the four-day program includes live storytelling, hands-on activities, and journey-mapping using artificial intelligence. The NEO program focuses on reinforcing Autodesk's culture code, so all new employees receive the support, resources, and information they need to feel inspired and experience a sense of belonging from the start.

As the company looks toward reopening in a hybrid environment, Autodesk is preparing in two ways: by building flexibility into its workspace and continuing to build a culture

that emphasizes trust and belonging. They plan to offer three workspace options for employees: office-based, hybrid, and home-based. The goal is to reconfigure the workspaces to be more collaborative while creating a sense of belonging for all three groups.

To build belonging into the culture, Terry VanQuickenborne, Global Head of Learning and Organizational Development, is developing learning pathways for managers that emphasize trust. "They need to understand that trust is fluid, that it's a dynamic process," she said. In addition, the Culture, Diversity & Belonging Team developed a "belonging sprint" to embed inclusive leadership principles into the organization.

Autodesk has been careful to include work location in their inclusion efforts. "We want to ensure that proximity is not being equated with promotion or price," said Mike Asbery, Vice President, People Experience.

From a communications standpoint, the company is being transparent about its evolving adaptation to the workplace as reopening occurs. As they plan to reopen, the Employee Experience Team is gathering employee input and feedback through pulse surveys and focus groups.

The goal is to create a consistent return-to-work experience for employees around the world and support it with a communications roadshow from senior leadership. With belonging at the center, they will be sure to carry the successes of 2020 into the new era of hybrid work.

Case in Action: RELX Drives Employee Satisfaction with Networking

Headquartered in London, data and analytics company RELX has four business areas: Elsevier, LexisNexis Risk Solutions, LexisNexis Legal and Professional, and Reed Exhibitions. The company employs over 33,000 people across the globe, with almost half in North America.

Local regulations have guided RELX's reopening efforts across the globe, with in-person work optional as of Spring 2021 for those in areas where offices have reopened. Workspaces have been reconfigured to accommodate distancing while ensuring employees can gather safely for meetings. The company is using detailed surveys to guide its approach to hybrid work as offices fully reopen. With surprisingly high response rates, one division's employee survey covered everything from how many days a week they prefer to be in the office, what support they need for staying at home, and what support managers need for managing remotely. With those results in hand, the division will develop an equitable approach to hybrid work as 2021 progresses.

Throughout the first year of the pandemic, RELX focused on wellbeing by delivering nutrition, exercise, and mental health programs. "There's been a recognition that the 'always on' of being remote has been a challenge, especially while schools were closed," said Lynne McCormick, Head of Organization Effectiveness.

RELX's strong employee resource group (ERG) program proved to be a major support during the year of remote work, bringing inclusion and diversity (I&D) to the forefront. "The ERGs had already been active in a virtual way across the organization," said David Tempest, Head of Strategic Talent Projects. "They have been a strength in our reaction to working remotely."

In a year in which physical safety was a focus, RELX also provided training on psychological safety as part of its I&D efforts. Managers who receive the training are expected to bring it into their groups. "We want the business to own it, so that psychological safety becomes part of everything we do," said Tempest.

The learning team has embarked on a significant overhaul with the move to 100% remote learning. Initial efforts involved reconfiguring in-person training to virtual. Because learners rated the virtual and blended learning offerings as more highly effective than the prepandemic classroom training, RELX is looking at maintaining its virtual learning offering as offices reopen. But they do not want to lose the magic of the in-person setting. "We want to leverage cross-business networking opportunities as part of the virtual learning experience, in addition to providing targeted in-person programs," said McCormick.

To deliver more effective learning solutions that facilitate networking, Mary Glowacka, Global Lead, Digital Learning, is partnering with the business units to understand their needs and deliver solutions from the right learning technology vendors. "In this dynamic environment, we need to work closely with our vendors to optimize the solutions for our needs," she said.

Networking is a key consideration for new hires, too. With virtualized onboarding well underway, the emphasis now is on ensuring new hires make connections within the organization. A popular event piloted this year within the talent team has been "Tea, Toast & Teams," a weekly informal virtual meeting hosted at the team level.

Building connections through surveys, ERGs, wellbeing initiatives, manager training, and new learning programs have succeeded in making RELX a more networked organization, and making employees happier. In 2020, the employee net promoter score increased by 16 points. In addition, employee engagement and satisfaction scores reached all-time highs with increases of 10 points or more. The sense of trust and connectivity RELX has built while adapting to remote work in a highly disruptive year offers confidence that they will be able to adapt to the new world of hybrid work in the year ahead.

Case in Action: Agility Within L&D Helps Sutter Health Prepare for Hybrid Work

Sutter Health is one of the leading healthcare delivery systems in Northern California, providing care to 3 million people across 22 counties. It operates 24 hospitals and 200 clinics, with an employee population of more than 53,000.

Early in the pandemic and throughout 2020, Sutter Health focused on adapting to the clinical situations brought about by COVID-19 while ensuring both clinical staff and the newly remote administrative staff had the technology and training needed to function well in a multitude of work environments.

As a full reopening gets ever closer in tandem with California's rapid vaccine rollout, Chris Casement, Senior Manager, Learning Innovation Team, looks upon a transformed learning function at Sutter Health. Before the pandemic, Sutter Health had delivered 40% of its training virtually. Instantly, that went to 100% when the shelter-in-place orders went into effect, and Sutter Health utilizes a combination of digital technologies to deliver training.

"In the beginning, we were reacting and mainly focusing on converting courses to digital formats and providing training on how to use virtual meeting technology," Casement said. A request from a service line manager asking how to effectively lead his new virtual team brought about a shift in focus.

"We understood we would have to build managers' skills to successfully lead in new work environments," Casement said.

To address this need, the learning team built a "Practice of Leadership" portal that offers both bite-size and deep-dive learning opportunities for managers on topics like influencing from a distance, remote collaboration, reading body language virtually, and supporting team members' wellbeing. As Sutter Health transitions to hybrid work for up to 10,000 employees who have that option, it will focus on ensuring that a level playing field is maintained regardless of work location.

"Leading a hybrid team presents unique leadership challenges," Casement said. "It forces learning and development leaders to reimagine what skills and capabilities look like for managers."

In addition to enhancing the curriculum for leading virtually, the learning team had to adapt to remote work as quickly as everyone else and collaborate to deliver necessary training in record time. For example, in April 2020, the learning team used agile design principles and collaborated across functions to deliver a virtual, experiential training on how to have advance care-planning conversations with patients and caregivers in a telehealth setting. A process that previously would have used in-person meetings and taken two to three months was completed remotely in just two weeks.

The success of this innovative learning approach and the team's ability to pivot rapidly on a critical business need opened doors to new partnerships. In September 2020, L&D began partnering with the DEI function to raise awareness of bias in care practices. Together, they delivered a series of virtual conversations organized by clinical specialty rather than role level. As doctors revealed their experiences with bias, they set the stage for the rest of the organization to transform. The use of technology to create safe virtual space for critical conversations, combined with training on strategies to pause and check assumptions, will help Sutter Health "reset the bar on healthcare disparities," said Casement.

While the L&D team still needs to deliver onboarding, technical instruction, and compliance training, the past year has made it apparent that the learning function also has the role of building agile capabilities that become part of the culture and foster organizational success. Casement said, "Business is evolving so fast that the need for agility is only going to increase as we move toward a hybrid workplace."

Case in Action: Intentionality Leads PTC Toward a More Connected Hybrid Workplace

As a leader in industrial digital transformation, PTC helps manufacturing companies improve efficiency through augmented reality, industrial IIoT, product lifecycle management, and computer-aided design (CAD) solutions. With 6,700 employees across 96 locations, PTC employees were already versed in asynchronous digital collaboration; 20% of its workforce worked remotely before the pandemic.

Jenn Smithwood-Green, Principal, Organizational Development, described the early response to the pandemic as "back to basics." The company already had already been pursuing a more inclusive approach to collaboration and teaming. The change came in emphasis. "We began to deliberately identify and promote the leadership behaviors, qualities, and values that help us succeed in this environment."

Smithwood-Green has focused on delivering guidance to managers that helps them increase the quality of conversations with their team and individual team members. "In quality conversations, managers demonstrate empathy, take into account context, and provide personalized motivation by tying work to meaning," said Smithwood-Green. Specific tools are offered to help them connect with team members in more meaningful ways in both daily management activities and key corporate processes like performance and development.

As the company looks toward hybrid work, thoughtfulness and sentiment data gathered from the employee is guiding the approach. Because reopening regulations vary widely across locations, the Organizational Development and Learning Team is encouraging local leaders to make wise choices that reflect how their teams best work together, under a companywide approach that would have folks returning to the office two to three days a week. Leaders get to participate in forums where they can share ideas, best practices, and questions about reopening. "We want leaders and teams to be intentional about the activities that happen on days people are in the office," she said, suggesting that certain trainings, whiteboarding sessions, activities focused on team forming

and cohesiveness, or kicking off a collaborative project across teams be reserved for in-office days.

The L&D function has transformed at PTC in the last year, with a new chief learning officer and L&D staff. Building focus and timeliness (in the flow of work) into the development and roll-out of learning pathways has been key in finding the balance around the optimal delivery of on-demand, asynchronous, live, and eventually, in-person training.

Diversity, equity, and inclusion (DEI) at PTC is an essential component for driving innovation and better collaboration. In 2020, the company introduced its first chief diversity officer and began a companywide listening tour, engaging thousands of employees around the globe in conversation and idea-sharing. As reopening approaches, the team is also working to ensure that employees feel a renewed sense of belonging, regardless of work location on any given day. One way inclusion is being emphasized is through leadership training in psychological safety. "We're introducing psychological safety as the foundation of high performance," said Smithwood-Green.

Intentionality is also showing up in talent acquisition with PTC's inclusive teaming approach. The company seeks to hire not just for skills and technical expertise but also for the unique qualities, diversity of experience, personal passion, and working styles that augment and elevate the existing team.

Smithwood-Green, who holds an M.A. in organizational psychology, wrote her master's thesis on meaning and purpose at work, concepts that were previously vague to many. The disruption of the past year has brought those concepts to the foreground, allowing the organization to build them intentionally as it prepares for hybrid work. "We've been able to put into practice what we already understood intuitively," she said. "We now have examples of the behaviors and actions that make us more productive and invested in the work we're doing together and looking forward to the exciting possibilities the now present future of work presents."

Case in Action: Ferrero Gets Intentional About Social Connections

The Ferrero Group oversees the Nutella, Tic Tac, Ferrero Rocher, and Kinder brands. Based in Luxembourg but with deep roots in Italy, the company employs 43,000 people worldwide. Its long-standing relationship-based culture, in which most learning and business occurred in-person, was turned on its head in early 2020 when the pandemic closed its offices in China in January, and then spread throughout Italy and the rest of the world.

Early adaptations to support learning at Ferrero included a switch to virtual instructor-led training and technology training focused on Microsoft Teams as a virtual classroom. The Teams integration with the LMS made it easy for employees to access training as needed. Use of the LMS and some of the content catalogs integrated into learning channels skyrocketed 150%. The learning team quickly deployed tactical advice and tools for using technology more effectively, running better meetings, managing workloads, staying connected while in remote, and etiquette tips for working around interruptions.

Mary Jo Anderson, Director and Head of Ferrero University, shared how the relationship-based, extended family culture at Ferrero was challenged by the impersonal, focused nature of technology. “Now we are more intentional about fostering informal connections that used to be more organic in the office and usually around coffee breaks or at lunch,” she said. That includes allowing time for informal dialogue in meetings and hosting virtual social activities. “To stay true to our culture, it’s essential to keep those personal connections alive for employees at every level, from service line managers to staff,” said Anderson.

From May to October 2020, Ferrero was back in the office in shifts of three teams for each function. Each team was split into thirds and worked in the office one week out of every three. The company enlisted a PCR Covid-testing provider so that employees could get tested on a regular basis and added cleaning protocols. During the winter surge, offices closed again, and as of spring 2021, working in the office is voluntary. As they roll out “new ways of working” policies, Ferrero is gathering feedback through engagement surveys and an “employee cares” program supported by a new well-being initiative.

To support managers, Ferrero University has added learning content around trust, collaboration, and empathy and is encouraging a coaching/mentoring certification. Throughout, the efforts of the DEI team have been essential in helping managers be more aware, flexible, and accommodating to the needs of employees based on the dimensions of gender, workplace culture, nationality, and generation. Overall, the efforts of the DEI team and the University Team aim to create an environment of mutual respect. Ferrero knows it is journey, not a destination.

The Ferrero University tagline, “Together We Grow,” reminds employees that they can keep a sense of community through participating in its learning programs. In a year of strong business growth, employees are growing just as quickly through initiatives and interventions supported by company leadership and implemented by line managers and HR.

Appendix

Figure 4: Hybrid Work Checklist



Source: Josh Bersin Research, 2021.

The Big Reset Working Groups

Started in March 2020, the Big Reset working groups have clearly transformed the way we share, ideate, and research ideas to transform for the new reality of work. Hundreds of hours of dialogue with senior leaders from across the globe and many different industries helped us understand trends and burning issues during this time. We supported leaders to share across company boundaries what works, what lessons they learned, and how to not just survive but thrive in a world of crisis.

After the first three sprints of five-week meetings in 2020 and early 2021, we continued to convene meetings with

executives and quickly realized that participant priorities and focus areas had evolved.

Therefore, for this sprint, we formed five topical working groups and people self-selected accordingly based on their interests and needs. Each group was facilitated by a senior faculty member of the Josh Bersin Academy.

The groups were arranged into five major areas.

1. Diversity, Equity, and Inclusion: Participants explored leading practices, ideas, and success stories associated with diversity, inclusion, belonging, and equity. This group was led by Ray Narine and Daniel Shannon.

2. Safe and Productive Workplace: This group focused on the design and use of the physical, digital, and cultural workplace, and how it is changing in the new world of work. This group was led by Nancy Vitale and Pete Sackleh.

3. Leadership and Culture: This group focused on the role that leadership at all levels plays in creating a new work environment, and the cultural transformation required to move into the future. This group was led by Nuno Goncalves and PV Murthy.

4. Recruiting, Talent Mobility, and Workforce Planning: This group focused on the new world of attracting the right talent, hiring internally and externally, facilitating talent mobility, and planning for new skills and roles. This group was led by Nazneen Razi and Linda Ho.

5. Learning for the Future: This group focused on ongoing issues in career development, skills and capability

development, new learning solutions, and corporate learning strategies. It was led by Bonnie Cheuk and Jill Sochor.

Throughout this report, we give detailed examples and case studies of what we discovered, which includes how companies are designing and implementing hybrid work models with philosophies, programs, policies, processes, the impact on management and teams, and the employee experience. Other findings and resources are available to Josh Bersin Company members.

The Josh Bersin Academy is a highly scalable learning and information platform for HR professionals, and we encourage you to join to get access to the full range of information we are capturing. Members will find video interviews, events, and programs on topics such as resilience, leadership, agility, and employee listening.

About Josh Bersin



Josh Bersin is an internationally recognized analyst, educator, and thought leader focusing on the global talent market and the challenges impacting business workforces around the world. He studies the world of work, HR and leadership practices, and the broad talent technology market.

He founded Bersin & Associates in 2001 to provide research and advisory services focused on corporate learning. Over the next ten years, he expanded the company's coverage to encompass HR, talent management, talent acquisition, and leadership. He sold the company to Deloitte in 2012, when it became known as Bersin™ by Deloitte. Bersin left Deloitte in June 2018.

In 2019, Bersin founded the Josh Bersin Academy, the world's first global development academy for HR and talent professionals and a transformation agent for HR organizations. The Academy offers content-rich online programs, a carefully curated library of tools and resources, and a global community that helps HR and talent professionals stay current on the trends and practices needed to drive organizational success in the modern world of work.

Bersin is frequently featured in talent and business publications such as Forbes, Harvard Business Review, HR Executive, FastCompany, The Wall Street Journal, and CLO Magazine. He is a regular keynote speaker at industry events around the world and a popular blogger with more than 800,000 followers on LinkedIn.

His education includes a BS in engineering from Cornell University, an MS in engineering from Stanford University, and an MBA from the

About Mark Spratt



Mark Spratt, senior vice president, advisory services, leads the Josh Bersin Academy's Big Reset initiative, created to help HR leaders address the unprecedented challenges of the coronavirus pandemic. He brings 20 years of management consulting experience to his client. In senior advisory roles at Deloitte and PwC, he worked with clients on a variety of engagements ranging from preparing workforces for the future to enterprise HR transformations to integrated learning and talent solutions.

Mark has dual master degrees in public administration and social research from the University of Southern California; he also served as an adjunct lecturer for three years at USC.

About Kathi Enderes



Kathi is the vice president of research at the Josh Bersin Academy; she leads research for all areas of HR, learning, talent, and HR technology. Kathi has more than 20 years of experience in management consulting with IBM, PwC, and EY and as a talent leader at McKesson and Kaiser Permanente. Most recently, Kathi led talent and workforce research at Deloitte, where she led many research studies on various topics of HR and talent and frequently spoke at industry conferences. Originally from Austria, Kathi has worked in Vienna, London, and Spain and now lives in San Francisco. Kathi holds a doctoral degree and a masters degree in mathematics from the University of Vienna.

About Janet Mertens



Janet Mertens is the director of research at Josh Bersin Academy. In this role, she conducts empirical research on a variety of topics related to work and people and leads the development of fact-based insights for today's HR executive. With 20 years of HR consulting experience across multiple industries, Janet most recently led the human capital research program at IBM's Institute for Business Value. She has published key studies on employee experience, the enterprise skills gap, and the emerging role of the CHRO. Janet holds degrees in computer science, education, and psychology; her current research areas include talent acquisition, workforce wellbeing, and the application of AI in HR.

Contributors



Bonnie Cheuk

Founding Member, Sense-Making Methodology Institute.

Dr Bonnie Cheuk has a global role to redefine learning, build global learning agility capability, and promote a culture of lifelong learning to enable companies to grow through innovation. On the academic side, she is a founding member of the Sense-Making Methodology Institute, a nonprofit website sharing research articles informed by Dervin's Sense-Making Methodology to understand users' needs to design "communicative" and user-centric solutions. Bonnie is the author of *Social Strategies in Action: Driving Business Transformation*.



Nuno Gonçalves

Nuno is currently the global head of strategic capabilities building for Mars. In this role, he is working on understanding the critical capabilities for the future and ensuring the company's business strategy is fully aligned with the Mars University. Previously, he worked for UCB, a bio-pharma company, where he held different roles including the HR vice president for neurology, the chief learning officer, and the global head of talent acquisition and development. Before joining UCB, Nuno was also Sanofi's chief learning officer.



Nicole Haris

Talent and Organization Leader, Mondelēz

Nicole Haris is a talent and organization development leader focused on optimizing performance with leaders, teams, and organizations. She's held various talent management and organization development roles at companies such as Kraft Foods, McDonald's Corporation, PepsiCo, and most recently Mondelēz International, where she was responsible for leading the company's agile transformation, focused on culture change. She earned her master of science degree in learning and organizational Change (MSLOC) from Northwestern University and BA in Sociology & English from McGill University.



Linda Ho

Vice President, Culture and Capability, Autodesk, Inc.

Linda leads culture transformations; learning and organization development; and diversity and belonging at Autodesk. An HR business partner with 20+ years' experience creating high-performing teams to achieve profitable and organizational success, Linda thrives at the intersection between employee experience and business strategy. Her passion is creating an environment where purpose-driven work can flourish. Linda holds an MBA from the University of Washington and a BA in social ecology from the University of California, Irvine.



Dr. P.V. Ramana Murthy

HR Advisor and Consultant, Indian Hotels Company

PV has more than 30 years of experience across the entire gamut of the HR function. He currently serves as an HR advisor and consultant to the Indian Hotels Company Limited, which operates the Taj Group of Hotels, Resorts and Palaces. Formerly, he was global head of HR, with responsibilities spanning performance management, career and succession planning, leadership development, and culture. PV also served as the executive director of human resources for Coca-Cola in India.



Ray Narine

Head of Talent Development and Deputy Diversity Officer, Consumer Reports

In January 2020, Ray Narine joined Consumer Reports, the leading consumer advocacy organization in the US, to lead its talent development, employee experience, and DEI work. Ray develops impactful solutions that apply expertise in various domains, including talent management, engagement, culture formation and diversity and inclusion. Ray's contributions are noted for future-of-work focus and innovative practical approaches to talent-building programs, technology implementations, and operational efficiencies. Prior to joining Consumer Reports, Ray held HR and talent management roles at multiple companies, including S&P Global and American Express.



Lee Ann Prescott

Lee Ann Prescott is a writer and analyst covering the HR and talent acquisition space. For the past decade she has worked with companies like Simply Hired, Glassdoor, Lever, and the Josh Bersin Academy to illuminate research and communicate trends shaping the modern workplace. Lee holds a BA in American Civilization from Middlebury College and an MFA in creative nonfiction writing from the University of San Francisco.



Nazneen Razi

President and Principal, NRHR Talent Consulting

Nazneen specializes in HR and talent strategies to drive business improvement. She has 25 years of experience in working with leading HR organizations. Prior to her current role at NRHR, she was senior vice president and chief human resources officer for Health Care Service Corporation and executive vice president and chief global human resources officer for JLL.



Pete Sackleh

Workforce Optimization Advisor, SolutionSpark

Pete led the strategic, experiential and physical development and operations of two world-class corporate universities - Deloitte's \$300m investment in Deloitte University in Westlake, Texas and KPMG's \$450m investment in the KPMG Lakehouse in Lake Nona, Florida. He now leads SolutionSpark LLC, a workforce optimization consulting firm, which applies Pete's expertise in areas such as innovative talent experience models, employee engagement, investment and retention.



Daniel Shannon

Chief Inspirational Officer, Daniel Shannon Speaks

Daniel has nearly two decades of executional and thought leadership experience with Fortune 100 companies in the CPG, financial services, and retail industries. He brings expertise in the areas of strategy, diversity/equity/inclusion, marketing, multicultural market development, sales, change management, leading through ambiguity, training and development, emotional intelligence, professional speaking, large group facilitation, and motivation. In his current role, Daniel provides leadership for Target Corporation's D&I efforts.



Jill Sochor

Global Leadership Development Manager at Ford Motor Company

Jill Sochor is an experienced talent development professional, HR business partner, strategist, and educator. She is passionate about a holistic view of leadership development that includes wellbeing, inclusion, team effectiveness, and motivation. She is a collaborator and innovator who enjoys shaping white space and creating experiences in which leaders grow. Previous roles at Ford include Human Resource Business Partner, developing and implementing an organizational design and change management plan to enable transformation of all aspects of customer business.



Terry VanQuickenborne

Global Head of L&OD, Autodesk

Terry VanQuickenborne is an organizational development and learning professional, and executive coach. In her role as Global Head of L&OD at Autodesk, she leads the design and delivery of enterprise learning strategy and organization development service offerings. She has over 20 years experience in organization and leadership development. She holds a master of science in Organization Development from Pepperdine University, and has served as Adjunct Faculty.



Nancy Vitale

Co-Founder and Managing Partner, Partners for Wellbeing

Nancy Vitale was most recently the chief human resources officer for Genentech where she was responsible for leading the team that was dedicated to creating a great place for the organization's 14,000 employees to do their best work. Upon leaving Genentech, she co-founded Partners for Wellbeing, an advisory and consulting firm dedicated to helping organizations create better places to work. Nancy also currently serves as a board member for the Make-A-Wish America Foundation.

Fellows

Jill Gardner

Jill is a corporate learning leader with experience in instructional design, talent development and HR technologies. She currently is a strategic consultant and operations manager for enterprise learning and development at Farmers Insurance. Previously, she held multiple learning-related roles at The Walt Disney Company and was a human capital consultant for Deloitte.

Matthew Moeller

Matt has more than 20 years of experience executing human capital projects and organizational transformations. He worked for Deloitte for 14 years and held a variety of positions. Most recent, he was manager of talent development for Deloitte Services and manager of workforce transformation for Deloitte Consulting. Matt holds an MBA degree from San Diego State University.

Victoria Morgan

Victoria Morgan has a masters from Tufts University, where she focused on communication, intervention and behavior change. She also holds a PHR certificate from the Human Resource Certification Institute. She has been involved with many aspects of corporate wellness including physical fitness, nutrition, psychological well-being, and culture change. In addition to her work with the Josh Bersin Academy, she is a marketing and communications associate with the Worksite Wellness Council of Massachusetts.

Minu Nair

Minu has worked in the travel and hospitality industry in the Middle East and India for almost 14 years. Most recently, she was a reservations officer for Emirates Airlines and managed multi-cultural sales teams and key client accounts. She holds a bachelor's degree in hospitality management from Bangalore University and recently completed her master's degree in talent development and HR from IE University, Madrid.

Karen Romero

Karen holds a B.S. in business administration from the University of Southern California, where she recently completed her MBA. Prior to pursuing an MBA, Karen worked in retail management and human resources.