Unleashing Data Intelligence: Mercer's DnA Academy Powers Next-Generation Analytics

Mercer

Best Association Professional Development Program

November 2024

Company Background

Company-at-a-Glance	
Headquarters	1166 Avenue of the Americas, New York City, New York
Year Founded	1945
Revenue	$5 billion
Employees	25,000
Global Scale (Regions that you operate in or provide services to)	130 countries in Africa, Asia, Europe, North and South America and Australia
Customers/Output, etc. (Key customers and services offered)	Mercer helps clients around the world advance the health, wealth, and performance of their most vital asset – their people. Clients include international companies of all sizes serving the leaders, HR managers and employees with the solutions, services and insight they need to make the most of their benefits.
Industry	Consulting and benefits/HR administration
Stock Symbol	MMC
Website	http://www.mercer.com

Budget and Timeframe

Budget and Timeframe	
Overall budget	$0
Number of (HR, Learning, Talent) employees involved with the implementation?	3
Number of Operations or Subject Matter Expert employees involved with the implementation?	15
Number of contractors involved with implementation	0
Timeframe to implement	6-8 months
Start date of the program	February 2023

Fit to the Needs

Mercer Data and Analytics (Mercer DnA)

The Mercer DnA Academy was initiated in response to several challenges and opportunities within the organization. The business conditions at the time highlighted the need for a comprehensive data and analytics platform that could streamline processes, improve efficiency, and drive revenue. Some of the business needs that led to the creation of this professional development program:

Business Conditions and Needs:

1. **Excel Dependency and Customized Dashboards:**
   - Consultants' reliance on Excel for data aggregation led to inefficiencies and significant manual effort in creating customized dashboards for clients. This approach was time-consuming and not scalable for the growing demands of data analytics.

2. **Development Costs and Data Access Challenges:**
   - The practice of building custom data portals for each client resulted in increased development costs. Additionally, obtaining permissions for individual data assets posed challenges, causing delays in project execution.

3. **Data Transformation and AI/ML Model Deployment:**

   - Data engineers faced challenges in transforming files between formats using existing tools. Data scientists encountered risks and inefficiencies in creating AI/ML models locally, requiring extensive redesign before deployment.

4. **Testing and Deployment Challenges:**

   - Project managers experienced delays and inefficiencies in testing, upgrading, and deploying software features across multiple environments, impacting the overall project timelines.

Implementation:

To address these challenges, the Mercer DnA Academy was established in collaboration with Learning & Development (L&D). The Academy aimed to provide a comprehensive data and analytics platform to streamline processes, enhance efficiency, and drive revenue. Key aspects of the implementation included:

1. **LXP Pathway Integration:**

   - Implementing a Learning Experience Platform (LXP) pathway for each persona within the Mercer DnA platform streamlined the learning process and centralized knowledge resources.

2. **Skill Enhancement and Collaboration:**

   - The centralized approach aimed to increase colleague skills, promote collaboration, and drive the adoption of data and analytics capabilities within the organization.

3. **Comprehensive Data and Analytics Features:**

   - The Mercer DnA platform offered features such as Data Engineering, Descriptive Analytics, Predictive Analytics, Data Discovery, and Data Delivery, leveraging modern cloud architecture for seamless access.

4. **Economic Benefits from Reusable Components:**

   - A pool of reusable data and analytics components resulted in dynamic visualizations for clients, efficient data asset discovery, and quick deployment of AI components, leading to significant economic benefits.

5. **Modern Cloud Delivery Practices:**

   - Adopting modern cloud delivery practices simplified upgrades and reduced deployment time, addressing the testing and deployment challenges.

Outcome:

The Mercer DnA Academy effectively addressed the business need for a more efficient, scalable, and cost-effective data and analytics solution. By driving innovation, enhancing client experience, and improving operational efficiencies through data-driven insights and solutions, the Academy aligned with the organization's strategic objectives and responded to the identified business needs and challenges.

Overview

Goals and Objectives: The professional development program at Mercer, centred around the MercerDnA platform, was designed with the following goals:

1. **Develop Skills and Knowledge:** Equip Mercer colleagues with advanced data and analytics capabilities in data engineering, data science, and data visualization.

2. **Empower Innovation:** Enable colleagues to deliver innovative solutions by leveraging the MercerDnA platform.

3. **Better Client Relationships:** Provide colleagues with the tools and knowledge to strengthen client relationships through data-driven insights.

4. **Drive Revenue Growth:** Empower colleagues to contribute to revenue growth by utilizing advanced analytics capabilities.

Training and Resources: The program provided comprehensive training and resources, including:

1. **Data and Analytics Tools:** Access to tools like Qlik and Spotfire for effective data visualization and analysis.

2. **Curated Data Sets:** Availability of over 100 curated data sets to provide a wide range of data sources for analysis.

3. **Application Support:** Support for over 30 applications across Mercer practices to ensure a broad application of data and analytics skills.

4. **Skill Development:** Focus on developing skills in data transformation, visualization, and AI machine learning through Mercer-customized reusable templates and AI starter kits.

Marketing and Target Audience: The program was marketed to a corporate audience, leveraging partnerships with industry leaders (AWS and Qlik). Marketing efforts included targeted communications to Mercer colleagues, highlighting the benefits of the program and the platform in driving innovation and enhancing client experience.

Impact on Buying Organizations:

Alignment with Organizational Objectives: The MercerDnA platform was aligned with the overall data and analytics strategy of buying organizations, aiming to:

1. **Democratize Data:** Provide self-service capabilities and easy data collection, enabling organizations to make data-driven decisions.

2. **Operational Support:** Offer operational support and enable data-driven revenue generation.

3. **Cost-Effective Insights:** Deliver insights in a cost-effective manner, enhancing the value proposition for clients.

4. **Quick AI Implementation:** Enable the rapid implementation of AI capabilities, providing a competitive edge to organizations.

Program Outcomes: The professional development program had a significant impact on buying organizations by:

1. **Empowering Colleagues:** Equipping Mercer colleagues with the necessary skills and tools to effectively leverage the MercerDnA platform, leading to enhanced service delivery to clients.

2. **Driving Innovation:** Enabling the delivery of innovative solutions to clients, addressing their unique business challenges through data-driven insights.

3. **Strengthening Relationships:** Enhancing client relationships by providing data-driven solutions that align with their strategic objectives, leading to increased trust and collaboration.

4. **Revenue Growth:** Contributing to revenue growth for buying organizations by offering advanced analytics capabilities that drive operational efficiencies and competitive advantage.

The MercerDnA program aimed to improve the skills and knowledge of Mercer colleagues in data and analytics. By aligning the program with organizational objectives and effectively marketing it to a corporate audience, Mercer sought to drive adoption and maximize the value of the platform for both colleagues and buying organizations, ultimately leading to innovation, enhanced client relationships, and revenue growth.

Design of the Program

The Mercer DnA Academy program is meticulously designed to cater to the diverse needs and goals of its audience within the organization. The program structure and content are tailored to ensure a comprehensive understanding and practical application of data and analytics capabilities.

Program Structure:

1. **Phased Approach:** The program is organized into three distinct phases, each focusing on a different level of expertise and learning objectives. This structured approach allows participants to progress through the program incrementally, building on their knowledge and skills at each stage.

2. **Foundational to Advanced Learning:** The program design takes into account the varying skill levels within the organization, starting with foundational topics in Phase 1 and progressing to more advanced and specialized topics in Phases 2 and 3. This ensures that participants have a solid understanding of the basics before moving on to more complex concepts.
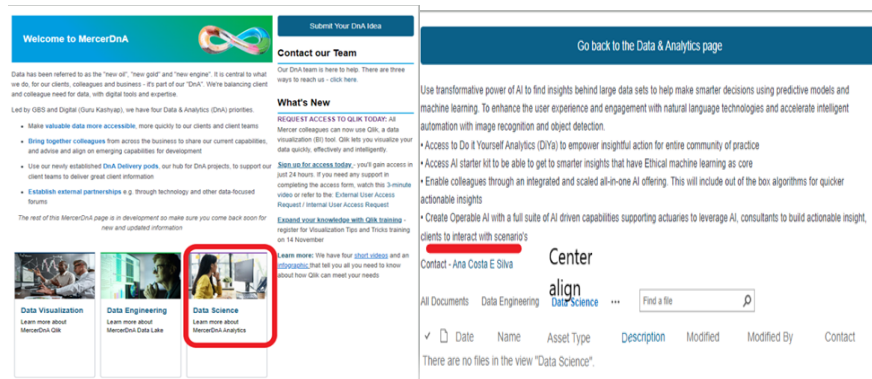
Learning Objectives and Topics:

1. **Phase 1 - Introduction to Mercer DnA Platform:** Participants learn the basics of the platform, including how to request access, set up projects, and understand data dimensions and measures. They are also introduced to key tools like Qlik and Spotfire, as well as curated data sets and reusable templates for data visualization and AI machine learning.

2. **Phase 2 - Advanced Topics and Skills:** The focus shifts to more advanced topics such as using Qlik tools for creating insight-rich data visualizations and exploring the self-service analytics capabilities of the platform. Participants learn how to move beyond insights to actionable analytics and develop their own dashboards using Qlik Insights Advisor.

3. **Phase 3 - Specialized Areas of Expertise:** Participants delve into specialized topics such as generative AI and marketing analytics. They explore advanced data analysis, predictive modeling, and generative AI to solve industry-specific problems. Collaboration between the Mercer DnA team and various practices and geographies is emphasized to drive innovation and operational efficiencies.

	Owner	Category	Priority	Status
MercerDnA 2.0 Platform Launch	Marianne Richards	Communication Assets	High	Open
	Anju Dhawan	Degreed Learning Content	High	In Progress
MercerDnA 2.0 Platform Dev	Aarti	KF2.0 Starter Kit and Architecture	High	In Progress
	Manish	BI Starter Kit and reusable templates	High	In Progress
	David	AI ML Ops Guide	High	In Progress

Launch Assets					
1. MercerDnA site v1	Mercer Link	n/a	All colleagues (focused on three persona groups) get more valuable input	1/16/2023	Complete
1. MercerDnA site v2	Mercer Link	n/a	All colleagues (focused on three persona groups) get more valuable input	3/10/2023	Complete
1c. MercerDnA Infographic v1	1 - Mercer Link 2 - Share with regional comm leaders (kat is linked to a Teams community) 3 - Supported by Yammer 4 - Add with Career for inclusion in Career newsletter (Yasmin Martin) 5 - Commercial Beat (Nicky Harris)	Kat	All Audience	3/29/2023	In Progress
2. MercerDnA Learning Academy - Phase 1		Chetan	All Colleagues	10/21/2022	Complete
2. MercerDnA Learning Academy - Phase 2		Chetan	All Colleagues	3/23/2023	Complete
A week campaign - Infographic (yammer and link to the comms community) first and followed by the Post card for next 4 days.					
3 - MercerDnA Platform Post Card/Infographic launch	Yammer			3/29/2023	
3 - MercerDnA Platform Post Card	Yammer	Guru	O&T	3/29/2023	
3 - MercerDnA Platform Post Card	Email?	Kat	EA Team	3/29/2023	
3 - MercerDnA Platform Post Card	Yammer	Kat	Leadership Dialogue	3/29/2023	

Training Materials and Resources:

1. **Comprehensive Training Materials:** The program provides participants with a wide range of training materials, including business user guides, BI starter kits, and online training courses. These resources are designed to cater to different learning preferences and ensure that participants have access to the necessary information to succeed.

2. **Practical Application:** The program emphasizes the practical application of learned concepts through the use of Mercer-customized templates, Mashup Templates for advanced reporting, and hands-on exercises with Qlik tools. This approach ensures that participants can apply their knowledge in real-world scenarios.

Comms Asset	Responsible Party	DnA Team Coordinator	Dates	Next Steps
1. MercerDnA ML site migration and updates	Michal Grabka		Begin working together starting 12/19	Himanshu will work with Michal on MercerDnA ML site migration to SP2 and add the changes discussed with Michal on 12/13/2022
1a. Guru's Video: script creation	Chetan, Deepti and Anju		12/19	Himanshu will follow-up with Chetan, Deepti and Anju to ensure the script is sent over to creative team for review
1a. Guru's Video: script review	Kat		01/03	Kat to review and share her feedback and changes with the entire team
1a. Guru's Video: script review with Guru	Wini/Jess		01/06	Wini/Jess will meet with Guru for his approval
1a. Guru's Video: production	Kat		TBD	Kat will book this
1b. MercerDnA - Animated video v1	Chetan, Anju		12/19	Share first snippet

During next week while I am out, Vikas will help you create and track the following:
1. Data Engg scripts and presentation from Aarti
   a. https://mmc.zoom.us/rec/share/QYgIy-Hyg7XtYh6Emi61fFI9-k15pls5jOCgkVF6ezK2U1sI3HWeA1McbY5neR1X.RiGoQ5azmi9FxrPV?startTime=1659075338000
      Passcode: %#KF1TUB
   b. Vikas please identify where is the Data Engineering presentation and host it here for Deepti/Chetan's review
2. Data BI scripts and presentation from Manish
   a. Vikas please work with Manish on finalizing the Qlik and Project onboarding learning content topic
   b. Vikas please work with Manish to create scripts and presentation for the BI learning Topics below,
      i. DnA Qlik Reusable templates
      ii. Checkout this MercerDnA BI starter kit first, before you start development on a BI/ Data Visualization project
      iii. What is Qlik used for at Mercer?
      iv. How can I go from Data to Dashboard in less than 15 minutes using MercerDnA platform?
3. Data Science scripts are being reviewed now, but Vikas please follow-up on the presentation to support each topic

Topic
Start here !
What frameworks can I have access?
How to onboard into R?
How to onboard into Spotfire?
Kubernetes
How to DiY in SKU1..4. Include dev,stage,prod
Share and Export your Spotfire Insights Spotfire Quickstart
Create a Spotfire Dashboard in 5 minutes Spotfire

Add a secondary content section under the DnA Platform personas (Qlik Sense/Data Science and Data Engineering), to include the example videos of projects delivered by the DnA team using the three platform personas
Identify a fitting location where a collated DnA Platform access request form, training video and training material can be hosted
   a. Himanshu/Pushpa is working on the Jira form
   b. Himanshu/Pushpa is working on the video script and presentation
   c. Himanshu/Pushpa is working on the training material
   d. Teresa will voice the DnA Platform training video

No.	Topic	Launch Phase	Priority	Content Owner	Persona			Links	Supporting Documentation
					AI	BI	Data		
	Enterprise Reporting	Ph2	High	Teresa				https://mmc.qumucloud.com/view/xI3ItOd2lQLv8XnUnZG1Mp	Finance and Sales Analytics - FAQ (mercer.com)
	EAT Employee Analytics Tool (Happiness Dashboard)	Ph2	High	Ana				2.2.1 Video - EAT Employee Analytics Tool.mp4	
3	Commercial Intelligence	Ph2	High	Teresa				TBD	

Conclusion:

The design of the Mercer DnA Academy program is carefully crafted to meet the specific needs and goals of its audience. By providing a phased approach, covering foundational to advanced topics, and offering comprehensive training materials, the program ensures that participants are well-equipped to leverage the capabilities of the Mercer DnA platform to drive innovation, better client relationships, and contribute to the organization's success.

Delivery of the Program

To facilitate the learning process, the program was translated into the LXP platform, which serves as the learning management system for the Mercer DnA Academy. The deployment of the Mercer DnA Academy professional development program was strategically executed to ensure accessibility, engagement, and effectiveness for its audience. Key components of the program's delivery include:
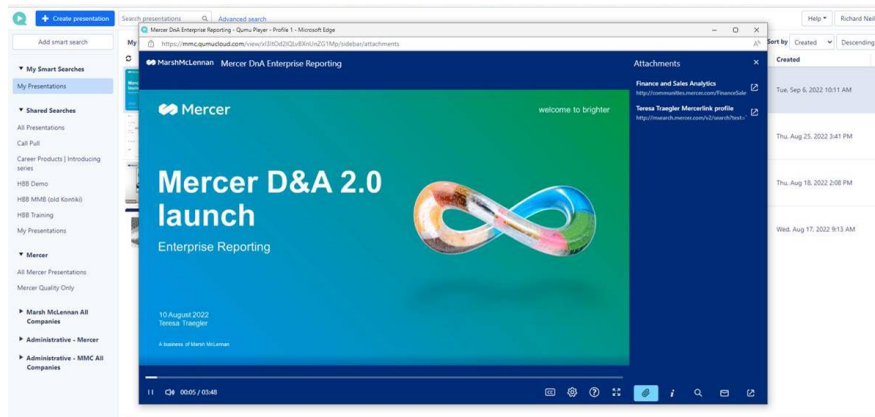
1. **Learning Experience Platform (LXP):** The program was integrated into the LXP platform, serving as the centralized learning management system.

This platform facilitated seamless access to various modules and courses, enabling participants to engage with the content in a structured manner.

2. **Self-Paced Online Modules:** The program offered self-paced online modules, allowing participants to learn at their convenience and pace. This flexibility catered to the diverse schedules and learning preferences of Mercer colleagues.

3. **Virtual Instructor-Led Sessions:** Virtual sessions led by instructors provided an interactive learning environment. These sessions offered real-time engagement with experts, enabling participants to ask questions, clarify doubts, and deepen their understanding of complex topics.

4. **Interactive Workshops:** The program included interactive workshops that encouraged hands-on learning and practical application of concepts. These workshops provided opportunities for participants to work on projects, collaborate with peers, and receive immediate feedback from instructors.

5. **Progress Tracking:** The LXP platform enabled participants to track their progress throughout the program. This feature allowed learners to monitor their achievements, identify areas for improvement, and stay motivated.

6. **Collaboration and Engagement:** The platform facilitated collaboration and engagement with instructors and peers. Participants could engage in discussions, share insights, and learn from the experiences of others, fostering a collaborative learning environment.

7. **Phased Approach:** The program's phased structure ensured that participants could progressively build on their knowledge and skills. This approach allowed for a logical progression from foundational concepts to more advanced topics, ensuring a comprehensive learning experience.

8. **Accessibility:** The use of the LXP platform ensured that the program was accessible to participants across different geographies and time zones. This accessibility ensured that all Mercer colleagues had the opportunity to participate in the program, regardless of their location.

9. **Continuous Support:** Participants received continuous support throughout the program, including access to learning materials, guidance from instructors, and technical assistance with the LXP platform.

10. **Feedback and Evaluation:** The program incorporated mechanisms for feedback and evaluation, enabling continuous improvement of the content and delivery based on participant input and learning outcomes.

In conclusion, the delivery of the Mercer DnA Academy program was carefully designed to ensure an effective and engaging learning experience. By leveraging the LXP platform, offering a mix of self-paced modules, virtual sessions, and interactive workshops, and providing continuous support and opportunities for collaboration, the program successfully deployed its comprehensive data and analytics curriculum to its audience.
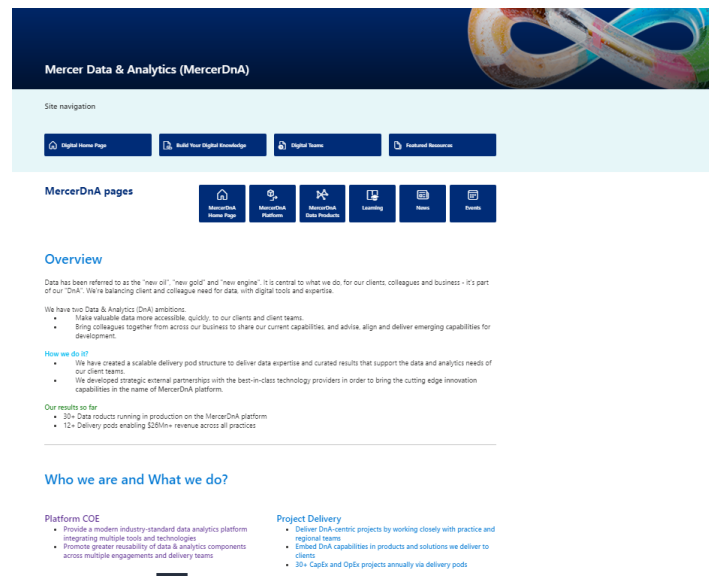
Change Management Efforts

The professional development program offered by the Mercer DnA Academy was deployed to its audience in a structured and comprehensive manner. The program designed to cater to the specific needs and goals of Mercer colleagues, with a focus on enhancing their skills and knowledge in data engineering, data science, and data visualization.

In delivering the Mercer DnA Academy program, Mercer encountered several challenges and obstacles, particularly in the areas of change management. These challenges included:

1. **Resistance to Change:** Some colleagues were resistant to adopting new technologies and processes, particularly those related to data analytics and AI. This resistance was due to a lack of understanding of the benefits of the program and a fear of the unknown.

2. **Technical Challenges:** Implementing a new learning management system and integrating it with existing systems posed technical challenges. Ensuring that the LXP platform was accessible and user-friendly for all participants required careful planning and coordination.

3. **Cultural Shift:** The program represented a cultural shift within the organization, emphasizing data-driven decision-making and collaboration. Some colleagues were accustomed to traditional methods of working and were hesitant to embrace a more data-centric approach.

To address these challenges and overcome resistance to change, Mercer implemented several strategies:

1. **Communication and Education:** Mercer launched a comprehensive communication and education campaign to inform colleagues about the benefits of the program and the importance of data analytics in driving business outcomes. This campaign included webinars, workshops, and informational materials.

2. **Training and Support:** Mercer provided training and support to colleagues to help them navigate the new LXP platform and understand how to use its features effectively. This training was delivered through virtual sessions and online resources.

3. **Engagement and Involvement:** Mercer encouraged colleagues to actively participate in the program and engage with the content. This involvement helped to build enthusiasm and momentum for the program, leading to greater acceptance and adoption.

4. **Feedback and Iteration:** Mercer solicited feedback from participants throughout the program and used this feedback to make improvements and adjustments. This iterative approach helped to address any issues or concerns that arose during the program.

Overall, Mercer's change management efforts were successful in overcoming resistance to change and ensuring the successful delivery of the Mercer DnA Academy program. By focusing on communication, education, training, and feedback, Mercer was able to effectively manage the change process and drive adoption of the program across the organization.

Measurable Benefits

Details: Mercer colleagues with advanced data and analytics capabilities, enabled them to deliver innovative solutions, enrichclient relationships, and drive revenue growth. The program was designed to address specific business needs and challenges within the organization, such as Excel dependency, development costs, data access challenges, and testing and deployment inefficiencies. By participating in the program, employers and individual customers experienced several measurable business benefits. These benefits included:

1. Improved Efficiency: The program provided colleagues with comprehensive training and resources, enabling them to streamline processes and reduce manual effort. By leveraging the MercerDnA platform and its tools, such as Qlik and Spotfire, colleagues were able to visualize and analyze data

quickly and effectively. This led to improved efficiency in data analysis and decision-making processes.

2. Cost Savings: The program offered reusable data and analytics components, resulting in significant economic benefits. Consultants could make use of these reusable tools and solutions, resulting in dynamic visualizations for clients. Clients gained access to an industry-standard data marketplace, eliminating the need for data processing or transformation. This reduced development costs and improved cost-effectiveness for both employers and customers.

3. Improved Project Execution: The program addressed data access challenges by providing a centralized platform and data catalogue. Development teams could easily discover data assets and collaborate with product owners and data solution builders. This streamlined project execution and reduced delays, resulting in improved operational efficiencies.

4. Enhanced Client Experience: By utilizing the MercerDnA platform and its functionalities, colleagues successfully delivered creative solutions and valuable insights to clients. The program focused on honing skills in data transformation, visualization, and AI machine learning, empowering colleagues to offer clients advanced analytics and data-backed recommendations. As a result, the overall client experience was improved.
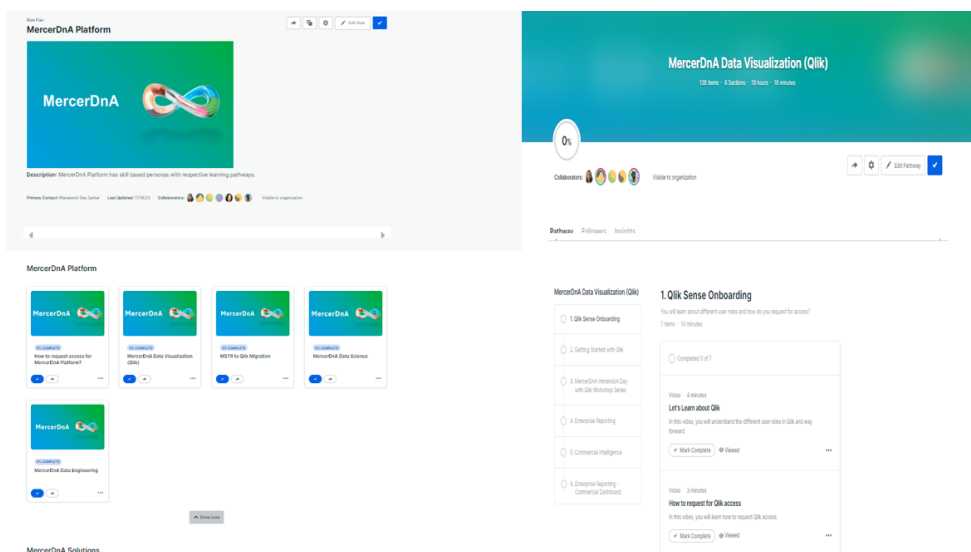
The program aimed to align measurable business benefits with the industry association's objectives by driving innovation, enhancing the client experience, and improving operational efficiencies through data-driven

insights and solutions. This resulted in increased efficiency, cost savings, improved project execution, and a better client experience. These benefits directly contribute to the association's objectives and position organizations for long-term success and growth.

The professional development program offered by the Mercer DnA Academy has proven to be highly beneficial for both businesses and employees. The program has resulted in measurable business benefits, including increased efficiency, cost savings, improved project execution, and an enhanced client experience. These benefits directly align with the industry association's business objectives of driving innovation, enhancing client experience, and improving operational efficiencies.

By participating in the program, employers and learners have experienced improved efficiency in their day-to-day operations. This increased efficiency has led to cost savings for businesses, as they are able to streamline processes and eliminate unnecessary expenses. Additionally, the program has helped employees increase their skills and knowledge, leading to improved project execution and overall performance.

Overall

The professional development program offered by the Mercer DnA Academy has made significant strides in enhancing the skills and capabilities of its participants, improving collaboration and efficiency, and delivering enriched client experiences and value. These outcomes have positively impacted both learners and their employers, showcasing the program's effectiveness as a learning approach.

Key lessons learned from the program include the importance of comprehensive training resources, alignment with organizational goals, and leveraging industry partnerships. The phased approach and availability of curated resources have been instrumental in facilitating learning and adoption. Some of the key outcomes include:

1. Effective Skills and Capabilities: The program successfully equipped Mercer colleagues with advanced data engineering, data science, and data visualization skills. Participants gained proficiency in using tools like Qlik and Spotfire, enabling them to analyze and visualize data effectively. This improved skill set has empowered colleagues to deliver innovative solutions and drive revenue growth.

2. Improved Collaboration and Efficiency: The program's emphasis on collaboration between the Mercer DnA team and Mercer practices/geographies has resulted in improved collaboration and knowledge sharing. Colleagues can now easily discover data assets, collaborate with product owners, and leverage reusable tools and solutions. This has streamlined project execution, reduced development costs, and improved operational efficiencies.

3. Develop Client Experience and Value: By leveraging the MercerDnA platform and its capabilities, colleagues have been able to provide clients with advanced analytics, data-driven insights, and actionable recommendations. This has significantly improved the overall client experience and delivered tangible value to customers.

Lessons learned from the program include the importance of providing comprehensive training and resources, aligning the program with organizational objectives, and leveraging partnerships with industry-leading companies. The program's phased approach and the availability of curated data sets, reusable templates, and AI starter kits have proven effective in facilitating learning and driving adoption.

Next Steps and Program Improvement: Moving forward, the industry association plans to further improve the professional development program offered by the Mercer DnA Academy. Some of the next steps and areas of improvement include:

1. Continuous Learning and Skill Enhancement: The program will adopt a proactive approach to continuous learning, ensuring that it stays in sync with the rapid advancements in data and analytics. Regularly updated training modules and upskilling opportunities will be provided to keep participants abreast of the latest tools, techniques, and trends in the industry.

2. Expanded Curriculum and Specializations: To cater to the diverse needs of the industry, the program will broaden its curriculum to cover additional areas of expertise and specializations. This expansion will enable participants to delve deeper into specific domains such as generative AI and marketing analytics, equipping them with the skills to tackle unique industry challenges.

3. Better Learning Experience: The learning experience will be enriched by integrating more interactive and immersive activities into the curriculum. The inclusion of gamification elements, virtual reality simulations, and real-world case studies will make the learning journey more engaging and practical, facilitating better retention and application of knowledge.

4. Feedback and Continuous Improvement: Participant feedback will be a cornerstone of the program's continuous improvement strategy. By actively soliciting and incorporating feedback, the program will undergo regular assessments and evaluations to gauge its effectiveness and identify areas for imprvement. This iterative process will ensure that the program remains responsive to the needs of its participants.

5. Industry Collaboration and Thought Leadership: The program will actively seek collaboration with other organizations and industry experts to enrich its content and stay at the forefront of industry best practices. By sharing insights, participating in industry events, and leveraging external expertise, the program will foster a culture of thought leadership and continuous improvement.

By implementing these next steps and improvements, the industry association aims to further strengthen the professional development program, ensuring it continues to meet the evolving needs of employers and individual customers.

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