



# Mercer's EDGE 2.0 Unlocks Hidden Talent Pool, Cuts Actuarial Workload by 40%

Mercer

Best Program for Upskilling Employees

November 2024



## Company Background



Company-at-a-Glance	
<b>Headquarters</b>	New York, USA
<b>Year Founded</b>	1975
<b>Revenue</b>	\$5 Billion
<b>Employees</b>	25,000
<b>Global Scale</b>	Health, Wealth and career consulting and solutions for 130+ countries
<b>Customers/Output, etc. (Key customers and services offered)</b>	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.
<b>Industry</b>	Consulting and benefits/HR Administration
<b>Stock Symbol</b>	MMC
<b>Website</b>	<a href="https://www.marshmcclennan.com/">https://www.marshmcclennan.com/</a>

## Budget and Timeframe



Budget and Timeframe	
Number of (HR, Learning, Talent) employees involved in the implementation?	2
Number of Operations or Subject Matter Expert employees involved with the implementation?	6
Timeframe to implement	3 months starting Jan of Q1'22
Start date of the program	Jan -2022

### Fit to the Needs

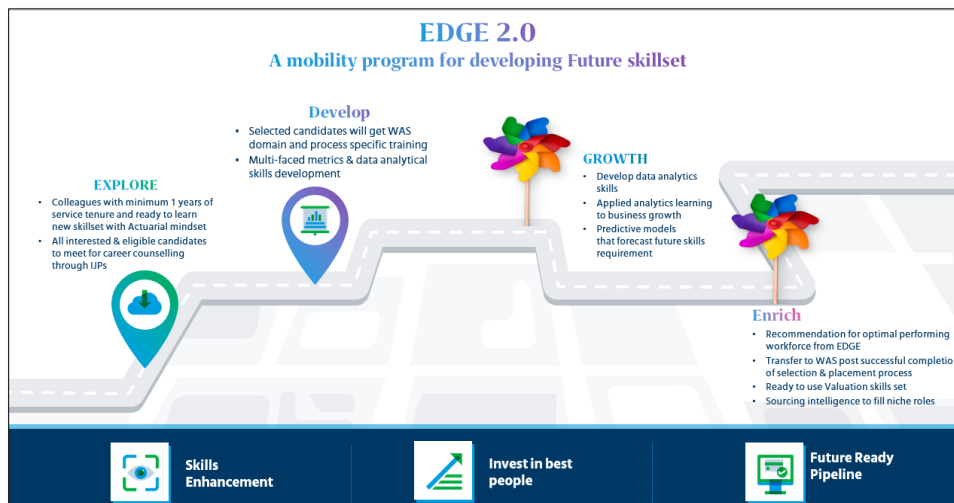
Mercer is a leading company in the field of retirement, insurance and investment outcomes, as well as unlocking real health and wellbeing. For over 70 years, Mercer has provided trusted advice and solutions to build a better, healthier, and more sustainable future for our clients, colleagues, and communities. Our overall business is divided into three major segments: Wealth, Health, and Career.

In late 2021, Mercer made an important strategic choice to separate the work carried out by the Wealth, Analytical, and Sales Enablement (WAS) group in order to optimize the use of highly skilled professionals. This decision was made to address the increasing demand for non-actuarial tasks, which was leading to inefficient utilization of core actuarial skills and a high rate of employee turnover within the group. A comprehensive analysis was conducted to determine the necessary skill set, considering the emerging trends and technologies in the Wealth industry.

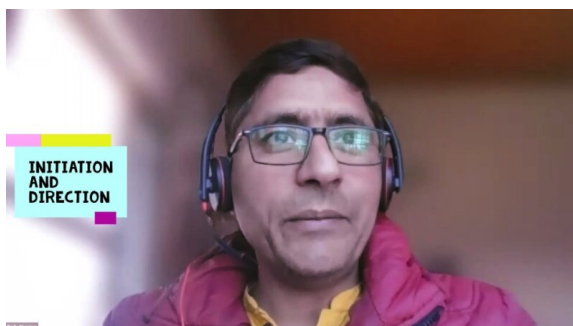
Following a successful proof of concept (POC) in Q4'21, the Wealth Leadership team introduced the EDGE 2.0 program in Q1'22, which led to the establishment of the WAS Enablement Team. This program aims to develop the future skillset for the Wealth Business and create a feeder pool for resource crunch.



The EDGE 2.0 (Explore, Develop, Grow, Enrich) is a career development program that enables colleagues to acquire new skillset and explore different roles across Wealth Actuarial domains. The initiative leverages the Data Analytics expertise of our administration teams to fill this capacity gaps within the Wealth business, providing new career prospects for colleagues in Mercer administration teams. This program was designed to address critical business objectives by assessing the need for upskilling, establishing goals, and achieving them through collaboration between the Administration teams and Actuarial business functions.



This initiative provides learning opportunities, guidance, and resources through new opportunities, mentorship, and learning circles. Through this initiative, we plan to develop skills-based programs, align job architectures, improve workforce and talent programs, and employ effective change management strategies. One of the other long term vision is how this new team can act as a feeder pool for Actuarial business with a ready talent pool available within Mercer reducing the training investment by ~5-6 months.



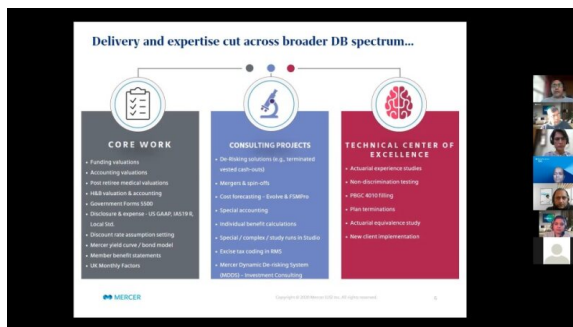


## Design

**Proof of Concept (POC)** was conducted in Q4'21 to verify the feasibility and to understand the potential of this concept. A small-scale version with ~8-10 team members was created and tested under controlled conditions. The purpose was to validate the underlying assumptions, assess knowledge transfer feasibility, identify potential challenges or limitations, and gather feedback from stakeholders so as to be better prepared for the full-fledge solution.

Based on the POC assessment, specific goals were established for the EDGE 2.0 program. These goals were aligned to the strategic objectives of the Global shared services and aimed to address the identified skills gaps.

A Business Working Group (BWG) comprising of Leaders, SMEs from both the Administration and Actuarial functions was formed who collaborated and partnered throughout the launch of this upskilling program. The Administration operations function played a crucial role by creating the talent pipeline of colleagues who had data actuarial/data analytics bent of mind, while the Actuarial function provided input on the specific skills and knowledge required to meet the business objectives. This collaboration ensured that the upskilling initiatives were tailored to the needs of the organization and aligned with its strategic priorities.





Hi All,

We are now expanding the WAS Enablement group (under Edge 2.0 programme). Hiring is on for 5 B2 openings and preference to be given to internal candidates. Reaching out to you to see if there are suitable colleagues in your team whom you feel fit best per the requirements and will be able to create a value and bring in the impact –

Here are some specifics –

- #of openings and grade level – 5 B2 level (B1 to B2 movements if you hire at B1 grade or B2 to B2 lateral movements)
- Strong with data and analytical skills
- Good with excel
- Logical and data interpretation activity
- Technical experience on data processing, exposure to data team - preferred

If there are suitable candidates, pls do let Karishma and me know by 11<sup>th</sup> Jul 2022 so that we can initiate the screening process.

Regards,  
Anamika

The journey started in Mar'22 with ~10-12 FTEs covering 2 tasks and the team scaled up to 25 FTEs over the next 5-6 months supporting 20+ actuarial related tasks spread across 13 geographies. The team not only excelled in the service delivery but along the way also strengthened the partnership by building trust with the WAS SMEs/checkers.

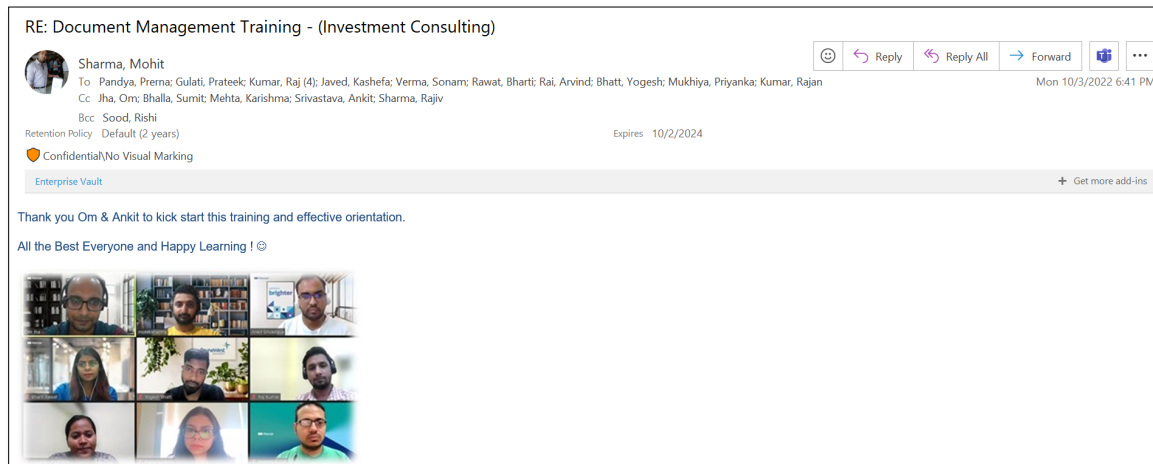
1. **Planning and Design:** The upskilling program was carefully planned in Q1'22 to address the specific needs and goals of the Wealth Business and its employees. This involved conducting a thorough analysis of the skills gaps and future requirements, as well as identifying the target audience for the program.
2. **Communication and Awareness:** A structured programme was designed in partnership with HR to keep the process transparent. Formal communications were rolled out to the entire organization with on-demand sessions with specific groups who asked for it. Clear and concise communication channels were established to inform employees about the program's objectives, timeline, and available resources.
3. **Training Delivery:** This upskilling program was delivered through a combination of training methods, such as workshops, online courses, mentoring, and on-the-job training. Different learning styles and preferences were considered to ensure maximum engagement and overall effectiveness.
4. **Feedback and Evaluation:** Steerco connects were set up at defined frequency to gather feedback from both the groups and address any concerns, open items and assess the program's impact. Surveys, focus



groups, and individual feedback sessions were conducted to understand the participants' experiences and identify areas for improvement.

- 5. Leadership Sponsorship:** Strong leadership support was essential to drive and reinforce the change. Leaders from both the groups actively participate in the change process, provided guidance, and addressed any resistance or challenges that arose. Their support helped us build trust and confidence amongst the colleagues.

It's always rewarding when hard work pays off and we're able to enhance scope by moving up the complexity ladder and added on more complex tasks. It's a testament to skills and capabilities gained by a newly formed group.



## Delivery

The Edge 2.0 pilot program, a 2022 strategic initiative, has enabled the Wealth, Analytical, and Sales Enablement (WAS) team to support over 800 clients spread across 13 geographies, while reducing their efforts by more than 40% in US Valuation Data portion work. This helped the WAS SMEs to focus on their core work and spend time on Consultants interaction to further provide best-in-class services to the end client. This has not only improved the consultant/end client experience but also led to savings of ~\$65K YOY.

This upskilling skill program was delivered effectively based on the business requirement and to overcome the increasing demand and complexity of non-actuarial work within the Wealth, Analytical, and Sales Enablement (WAS) team.



This has not only provided more colleagues with new skill sets and further opportunities for career progression but also enabled the WAS team to provide quicker and more streamlined support to the Consultants.

BWG group along with experts from both the teams wore their creative hats throughout the journey to constantly thrive for the best, were consistently challenging each other to evaluate how best we can utilize the teams.

**Change Management:** This posed as one of the biggest challenges that the BWG group had to address -

- a. **Resistance to Change:** De-coupling of the already existing process raised a lot of questions in the minds of WAS Subject Matter Experts (SMEs). On the other hand, the new work force had apprehensions on the technical expectations from them and the fear of the unknown or concerns/questions about their ability to adapt.
- b. **Communication:** Effective communication is crucial during times of change. The Leaders from both the groups came together to communicate the reason for change, anticipated benefits, showing the “BIG” picture to lay the foundation of a better future.
- c. **Skill Retention and Application:** Ensuring that the newly acquired skills were effectively applied in the workplace was another challenge. Ongoing support, reinforcement activities, and opportunities for practice and application were provided to help employees integrate their new skills into their daily work. The programme focused on learning, guidance and resources through study material, mentorship and learning circles and that helped pave the way for a smooth transition.
- d. **Change Champions:** Introduced the concept of champions from within the team who helped the Leaders drive the change and became the advocates. 2 SMEs were identified from each group to become the ambassadors. The organization supported and empowered them to lead by example and encourage others to embrace the change.

Successful project delivery is the culmination of effective planning, coordination, and execution by a team. It involves meeting project objectives, delivering high-





quality results, and satisfying stakeholders' expectations. Here are key elements that contribute to successful project delivery.

- **Skilled and Committed Team** – A team with right skills and expertise was created with clear goals and scope established at the outset.
- **Robust Project Planning** with roadmap for the colleagues and engagement plan to enhance their skills. Detailed training plans, documentation were created for new hires to help them in the skill enhancement journey

New Hire Training Plan – EDGE Team			
Weeks	New Hires	Task	Who
Sept Week 1	Yogesh Bhatt Priyanka Mukhiya Janvi Sabharwal Himanshu Rathore Gaurav Arora	Prior to Process Training	Process SME's
		Mercer New Hire Reference Guide	
		Workday Mandatory Trainings	
		Goals setup on Workday	
		Access requirements - Ensure all Supplies are available	
		Process Overview	
Sept Week 2	Yogesh Bhatt Priyanka Mukhiya Janvi Sabharwal Himanshu Rathore Gaurav Arora	Process Training	Process SME's
		Basic DB Trainings	
		Studio Navigation & Mapping Training	
		Retire Overview (Terminology, Warehouse Concept, Universal Status Codes, Adding New Services Practice on USCs and Adding New Services)	
		Online Material Links & Video	

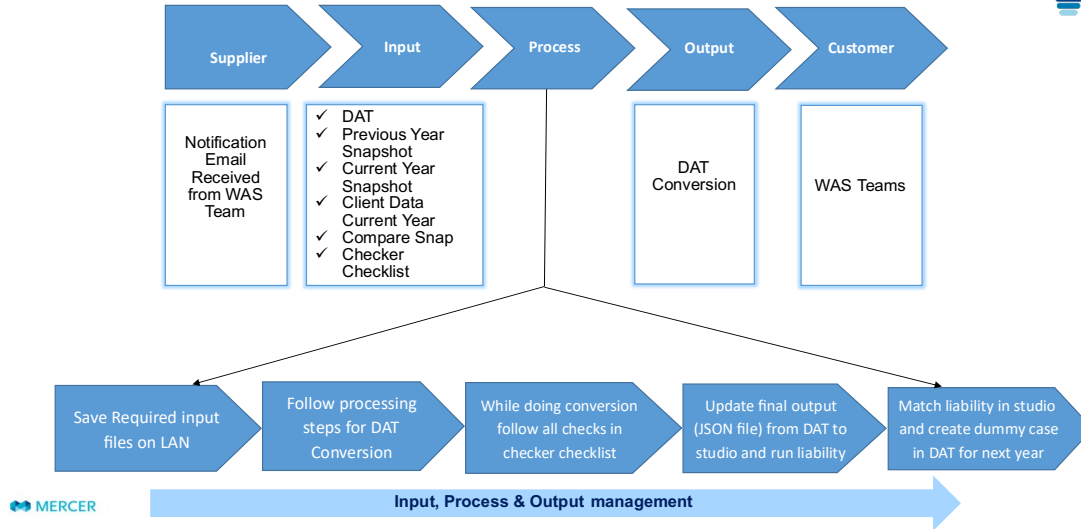




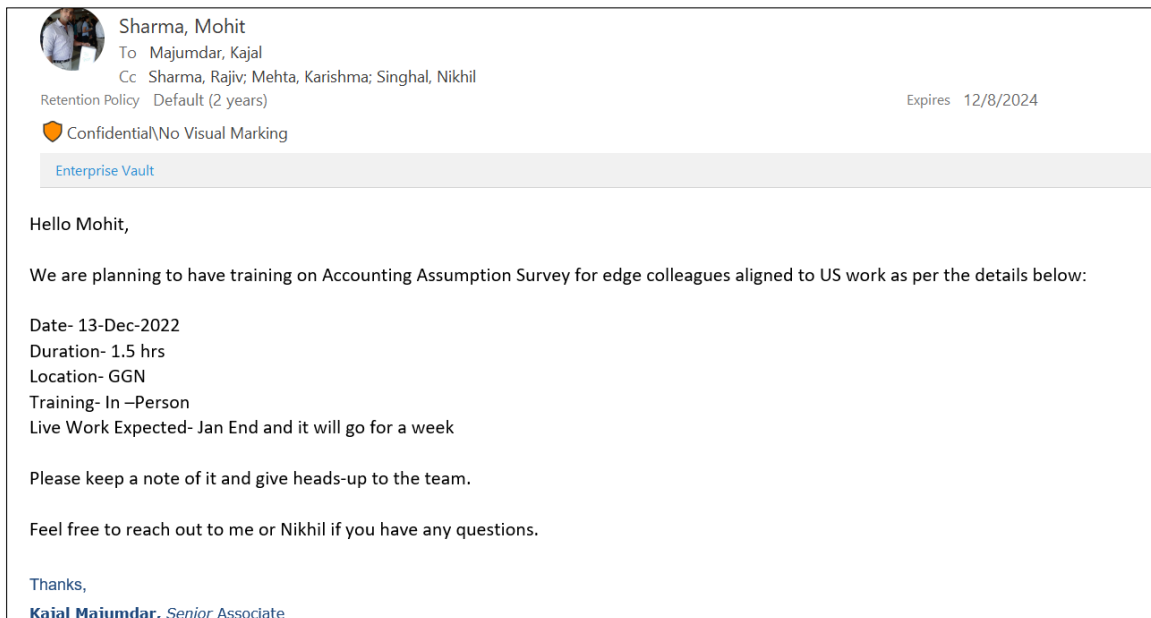
		Process SIPOC	
Week 3	Yogesh Bhatt Priyanka Mukhiya Janvi Sabharwal Himanshu Rathore Gaurav Arora	Process Training	Process SME's
		(Current View, Imports, Practice on Current View and Imports)	
		Filters, Simple Imports, Undo + Practice	
		Batch Update, Snapshots, View & Update + Practice	
		Online Material Links & Video	
		Derivations + Practice	
Week 4	Yogesh Bhatt Priyanka Mukhiya Janvi Sabharwal Himanshu Rathore Gaurav Arora	Process Training	Process SME's
		Assessments	
		Checks + Practice	
		Case studies Materials	

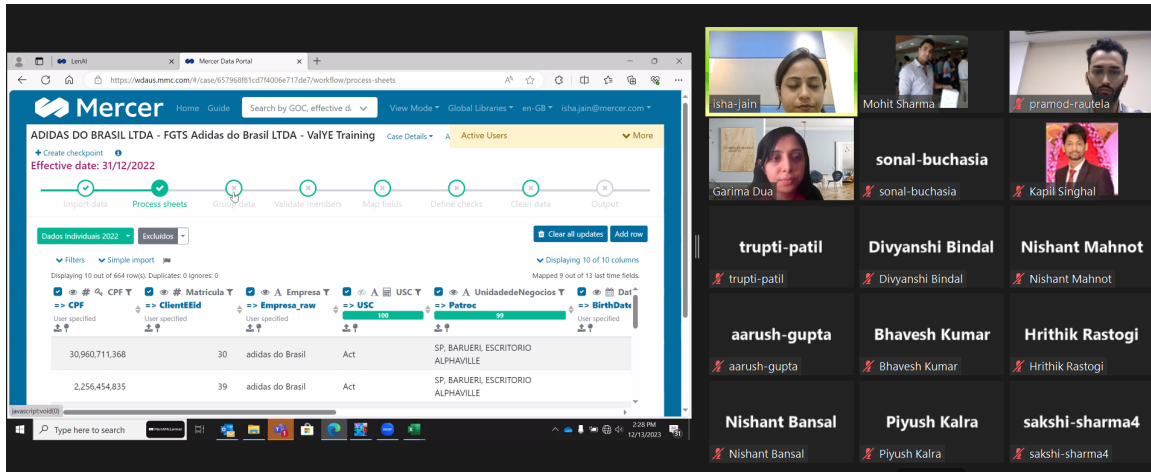


SIPOC – DAT CONVERSION  
 (DATA AUTOMATION TOOL)



Team members utilized a blended learning approach -combining various learning methods such as instructor-led training, e-learning modules, workshops, and on-the-job training. This approach catered to different learning styles and allowed for flexibility and accessibility.

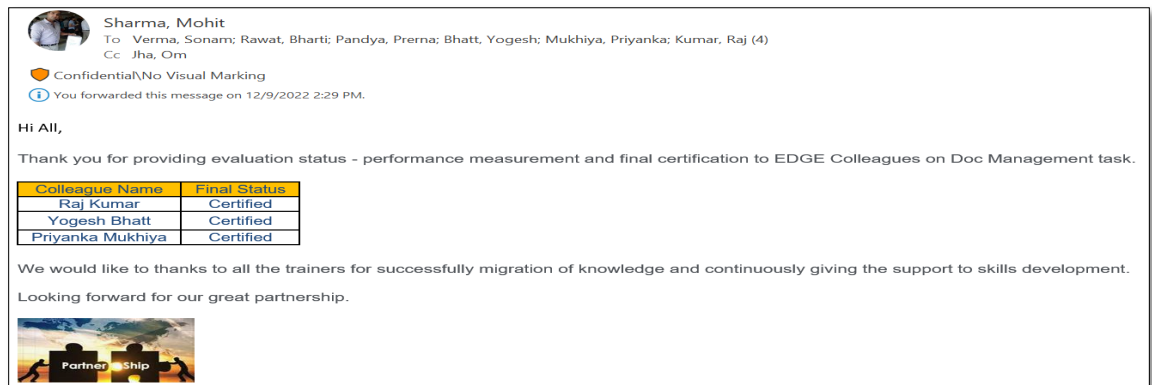
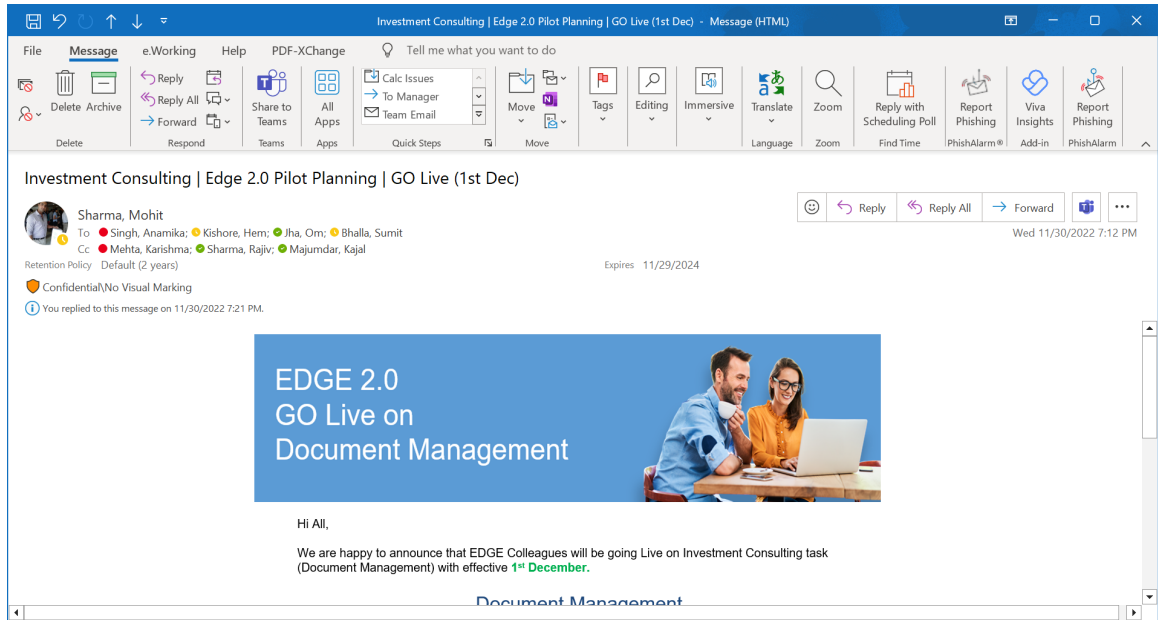




**All hands in** – Now we are not talking about any combat sport, rather the interest is more inclined towards countering challenges that may come to the business and to avoid any relapses, thus the team ensured regular doses of progress checks and reminders. Plan B was always in place, if the team faulted

- **A New Feather, A New Milestone** – Investment Consulting scope added to the group with 3 FTEs to support Consultants on analyzing investment portfolios to assess performance, risk exposure and alignment with client’s financial goals

This was another BIG accomplishment to dive into this strategic pillar in the first year itself.



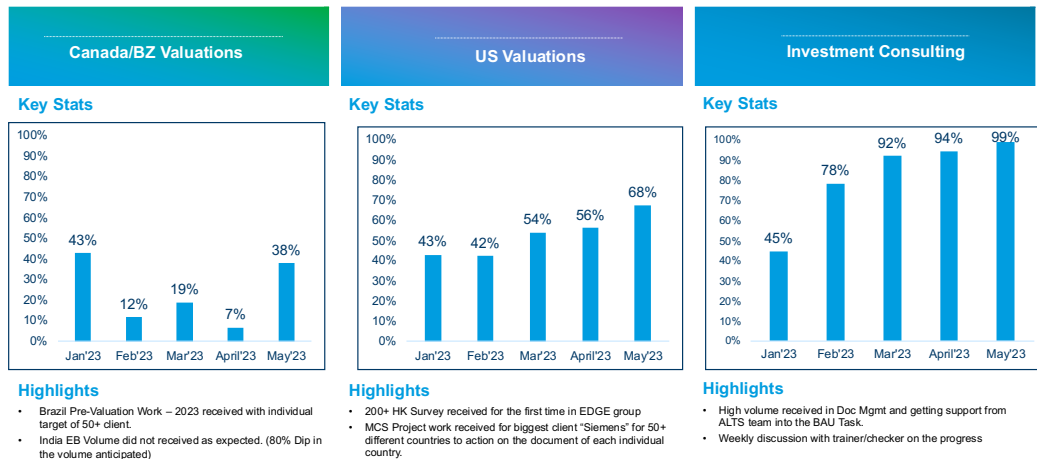
- Design for sustainable transformation** – The next big ticket item in line was helping business optimize the costs, drive efficiencies and reconfigure the agenda around strategic priorities. This was time to challenge the status quo by transitioning to next stage of Operational excellence and maturity - Better and stronger operational metrics, capacity planning, enhancing metrics tracking, operationalizing workflow tools, developing and enhancing operational risk and quality management framework to name a few.



Tracking to the key performance indicators (KPIs) and comparing them to predefined benchmarks helped the project stakeholders to assess the project's progress, identify areas of improvement, and take corrective actions wherever necessary.

May'23

### Leadership wise View Utilization %



Note : Source data collated from Time Log report and FTE calculated based on 123 hours for Production.

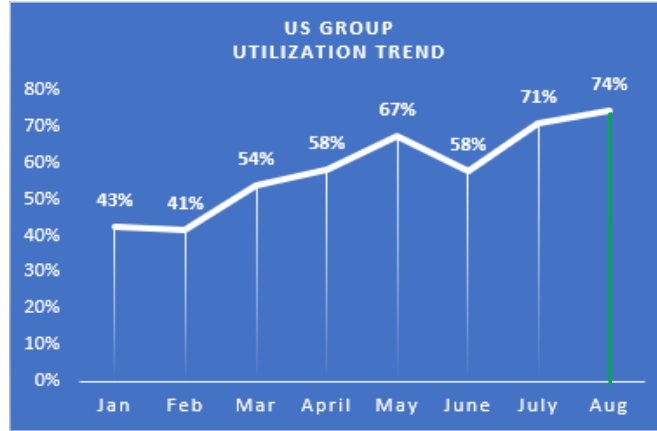
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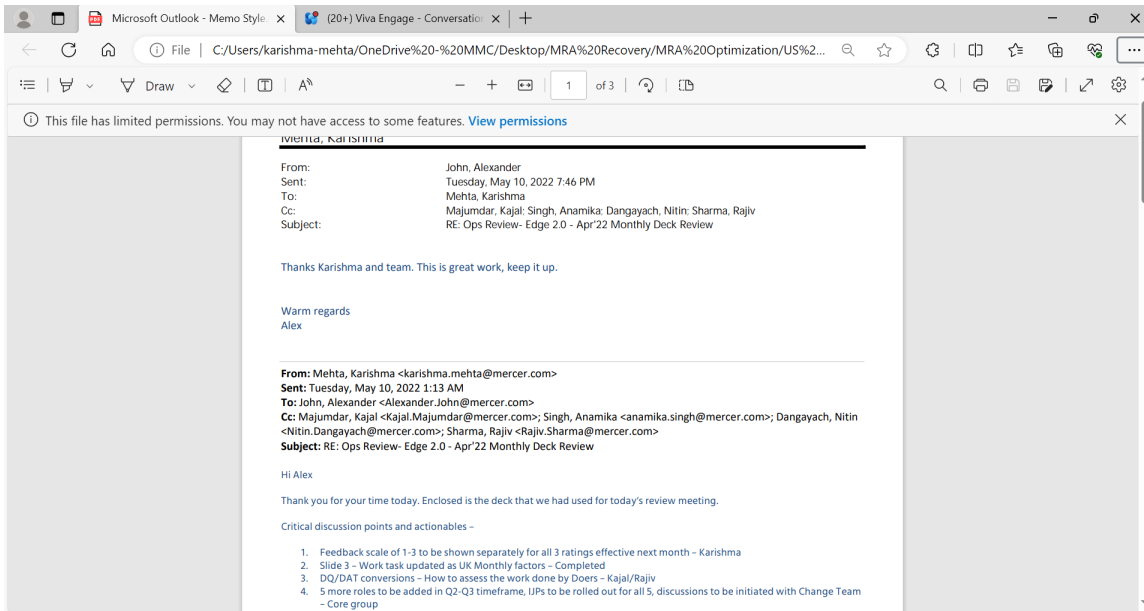
70%+ Utilization maintained from 3 consecutive months

## 2023 US Group Utilization Trend



All edge colleagues are working on multiple valuation task and strong base knowledge is required to maintain quality.

- **Leader’s Words:** Words of appreciation from various stakeholders -





Internal use

US Wealth

## US Accounting Assumptions Survey Thank You!



Dear All,

I am pleased to announce that we have successfully closed the US accounting assumption surveys with a total of **853 completed responses**. I want to express my heartfelt gratitude to each and every one of you for your time and effort in getting the surveys done.

Here are a few highlights from the survey initiative:

- 853 surveys were completed in total.
- 15 Enablement colleagues completed 615 surveys.
- 150+ surveys completed under each Delivery Leader.

Thanks to Mohit for his relentless efforts in driving this initiative and achieving the desired outcome.

Once again, thank you all for your contributions!

Best regards,

Bani





- Successful 1<sup>st</sup> year Delivery – 2022 Achievements:

INTERNAL USE



EDGE 2.0  
(A Strategic Initiative)  
1st Business Anniversary



## Delivery Footprint

<b>24 +</b> WORK TYPE SUPPORTED	<b>800+</b> GOVT FORMS COMPLETED	<b>700+</b> ACCOUNTING SURVEY
<b>1 Task</b> IC COMPLETE OWNERSHIP	<b>UK FACTORS</b> Monthly Support	<b>13K+</b> CLIENT HOURS DELIVERED
<b>40</b> UNIQUE APPRECIATIONS	<b>\$50K+</b> EFFICIENCY SAVED	<b>100+</b> US VALUATION DATA COMPLETED 2022

Locations & Value Chain



Brandon Hall Group™

**EXCELLENCE  
AWARDS™ 2024**

CASE STUDY



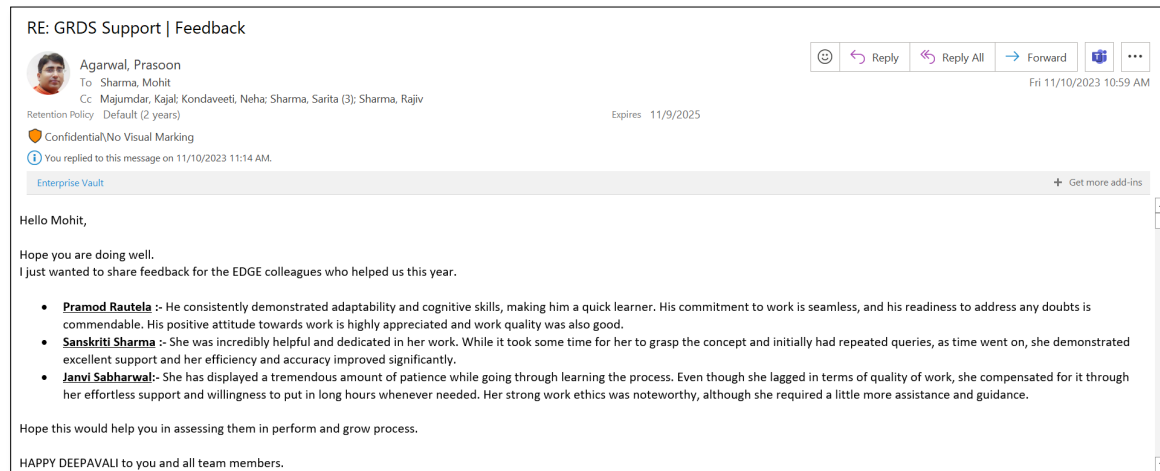


## Measurable Benefits

Marsh McLennan has achieved remarkable measurable benefits through the implementation of this framework:

**Colleague’s Reaction:** A sense of belongingness and a stronger partnership to deliver exceptional work to the Consultants/end clients.

Feedback from colleagues has been outstanding as the programme opened avenues for upskilling and they got a chance to develop and perform on the data analytics side



## VALUE ADDS

### Customer Impact



To Sukhmani,  
 I would like to appreciate Sukhmani as well for all the hard work she has been putting for this particular plan. She has shown full dedication and put in a lot of extra effort in the last couple of days. I really appreciate your dedication and commitment towards work.  
 From Ishita Khanna (Hong Kong Valuation)

To Kajal Baliyan,  
 Really, want to appreciate her on following the timelines. For my work, I have given her tight timelines & she has delivered on time without compromising on quality.  
 From Rahul Huria (Task – Valuation)



To Anjali Joshi,  
 I just want to say thank you to Anjali for providing the MDDS reports much before the timelines provided to her specifically for Sysco and also with good quality work. Till now I have delivered 3 reports with her and in all these three reports there were no changes made from my end. Keep up the good work Anjali!!  
 From Rahul Kanswal (Task – MDDS Work)



To Kashefa Javed,  
 Good work on the Inactive data for this client. The deliverables were in very good shape with only a single edit for me in query file.  
 Keep up this good performance.  
 From Himanshu Goyal (Task – Valuation)

To Siddharth Roy,  
 Thanks for providing good quality work in timely manner and for taking the ownership of the project.  
 Keep up the good work.  
 From Shashank Vashishtha (Task - ANZ Work)

To Isha Jain,  
 Thanks Isha for completing DAT conversion. I have reviewed and it looks good so far.  
 From Kanika Bhasin (Task - DAT Conversion)



- **Adopting a skills-based approach** - Sourcing the skills for future was a critical milestone that was achieved by leveraging the talent ecosystem, prioritizing developmental roadmaps, investing in future learning and reskilling workforce. Seeded in a Subject Matter Expert (SME) pool of data analytics experts to support business imperatives and contribute towards financial savings for the organization.

Enhanced Skill set	No. of core skills gained -
Technical Skills	Analytical skills
Technical Skills	Data validation
Technical Skills	MS Excel
Technical Skills	MS Word
Technical Skills	Numerical Skills
Technical Skills	Process Improvement
Technical Skills	Reporting
Technical Skills	Retirement studio
Technical Skills	Statistical Methods
Domain Skills	Domain Knowledge

- **Engine of Efficiency:**
  - Reduced efforts by WAS SMEs by more than 40% in US Valuation Data portion work allowing them to focus on the core actuarial tasks
  - Savings of **~65K YOY** (basis first year computation)
  - **End to end accountability:** Edge colleagues owning the end to end process of gathering data from various sources, such as insurance policies, claims records, financial statements, and demographic information
  - **Risk Assessment and Modeling:** Actuaries require data analysis to assess risks and develop models that quantify the likelihood and potential impact of various events. The Edge team provides continued support in building actuarial models, such as mortality

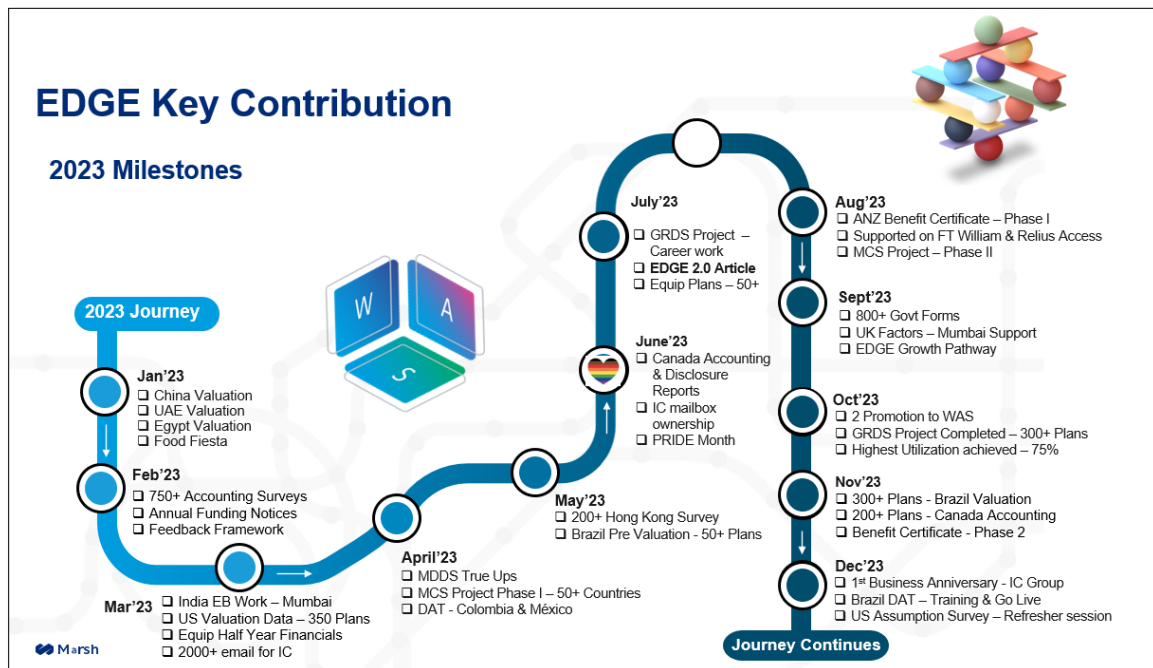


tables, loss reserving models, and pricing models, to estimate future outcomes and determine appropriate risk management strategies.

- **Predictive Analytics.** The Edge team uses historical data to identify patterns and build models that can predict future outcomes, such as claim frequencies, policy lapses, or mortality rates

- **Value Add: Noteworthy achievements:**

25+ tasks support to actuarial work as against less than 5 anticipated at the start of the program



- Support to **Investment Consulting** group
- **Influencing length and breadth of business processes** – Seeding coaches, program specialists, curating domain SMEs, cross leveraging expertise via Train the Trainer certification for Edge colleagues etc were some of the efforts that gave positive impact to the way teams reacted to the need of hour



- Feature on Mercer News Channel

Our success story was also shortlisted to be published in the Mercer News which is globally accessible

### **EDGE – Explore, Develop, Growth and Enrich**

WAS have the EDGE!

Since the launch of EDGE 2.0, the equivalent of 32 full-time employees (FTEs) worth of work has transitioned from WAS to WAS Enablement and UK pension teams, resulting in an improved customer experience and cost savings of over \$65k per year.

EDGE 2.0 is a strategic partnership between Wealth, Analytics, and Sales Enablement (WAS) and administration teams. Building on the success of [Skills-Edge](#) for clients, Mercer Global Services Delivery (GSD) introduced this initiative in March 2022 to review workload allocation within GSD and identify opportunities for greater efficiency.

The basics behind EDGE 2.0

Edge 2.0 focusses on addressing the increased demand for non-actuarial tasks within the WAS group, which were causing inefficient utilization of core actuarial skills. To tackle this issue, the initiative leveraged the expertise of administration teams to fill the capacity gaps within WAS, providing new career prospects for colleagues in GSD administration teams in Delhi (NCR) and Mumbai.

Tasks and processes within the WAS group that did not require core actuarial or investment consulting skills but demanded more data and analytical expertise, such as valuation data processing, transfer value calculations and reporting, were transferred to the administration teams. This transfer was made possible through upskilling the administration colleagues, ensuring successful knowledge transfer for critical tasks, and conducting multiple 'Train the Trainer' programs.

Looking ahead

Edge 2.0 program continues to explore further opportunities within GSD to optimize workload allocation and promote ongoing skill development, enabling support for multiple services within the WAS team. In early 2023, the Edge 2.0









program was successfully implemented in the investment team to reduce document management work, signaling more positive results on the horizon.

For any inquiries about Edge 2.0, feel free to contact Rajiv Sharma, Nikesh Shah, Sumit Bhalla, Karishma Mehta

- Enhanced career progression opportunities:
  - Career roadmap has been designed for Edge colleagues so as to expand their horizon and develop further in this space. Business teams in collaboration with HR People Partner, TA, L&D have created structured plan for colleagues to develop and grow in this space.
  - Various avenues are open basis an available opportunity and colleague’s interest to grow in their careers -

## Career Streams

 <b>Path I: WAS Actuarial Opportunities</b>	 <b>Path II: EDGE DCP Program</b>	 <b>Path III: Rotational Program - WAS</b>
<ul style="list-style-type: none"> <li>Develop foundational knowledge and be a feeder pool for WAS Actuarial via Lateral movement or IJPs</li> <li>Basis Proficiency levels and performance</li> <li>Map WAS Requirement with edge skills library</li> </ul>	<ul style="list-style-type: none"> <li>Align skills to jobs within EDGE group</li> <li>Assess and select talent basis the overall performance</li> </ul>	<ul style="list-style-type: none"> <li>Create Roadmap for EDGE colleague to demonstrate responsibilities, skills and competencies required.</li> <li>Move to WAS team as checker for time interval with <b>FIND A MENTOR</b> approach</li> </ul>
<b>Skills-Based Criteria</b>	<b>Basic Criteria</b>	<b>User Experience Criteria</b>
<ul style="list-style-type: none"> <li>Manage projects with minimal guidance</li> <li>Receive consistent positive feedback from a broad range of peers</li> <li>Demonstrate proficient analytical skills and able to perform advanced analysis</li> </ul>	<ul style="list-style-type: none"> <li>1 Year in current role</li> <li>On track rating in PFS</li> <li>Robust library of skills</li> <li>Continually deliver work with "right first time" approach</li> </ul>	<ul style="list-style-type: none"> <li>Develop and deliver knowledge sharing or training initiatives</li> <li>Act as a role model for less experienced colleagues</li> <li>Proficient in standard tools, processes and methodologies</li> </ul>
This includes lateral or Upward moves and skill development in WAS	Intends to focus on for the next level within EDGE Team as career management.	Cross Culture training to know complete Valuation service and enhance morale.

 Note : No order of sequence on above career path, multiple path can run simultaneously.







EDGE 2.0 Career Framework Process					
Indicator	Level	Parameter	Spocs	Remarks	Template
Internal communication	1 (a)	WAS IP requirements to be shared to EDGE Managers	WAS Spocs	Kajal Majumdar, Rajiv Sharma	Email Info
Receipt of application	2 (a)	EDGE Manager to check the requirement and evaluate the performance.	EDGE Spocs	<a href="#">Mohit Sharma, Karishma Mehta</a>	Template
	2 (b)	EDGE Manager to consolidate the details and shared with WAS Group for evaluation.	EDGE Spocs	<a href="#">Mohit Sharma, Karishma Mehta</a>	
Evaluation - Interview	3 (a)	Schedule Interview with Candidates with WAS Manager	EDGE Spocs	<a href="#">Mohit Sharma, Karishma Mehta</a>	Email Info
Publish the result	4 (a)	Shortlist the candidate's basis interview and feedback from Managers and shared with EDGE Manager	WAS Spocs	Kajal Majumdar, Rajiv Sharma	Email Info
	4 (b)	Publish the result and email communication to the wider team / all colleagues	EDGE Spocs	Mohit Sharma, Karishma Mehta	
Compensation	5 (a)	Increment recommendation by the HR talent acquisition/ Rewards Team	Business Spoc	Kajal Majumdar, Rajiv Sharma	
	5 (b)	Compensation approval by the BGM / HRM		Mohit Sharma, Karishma Mehta	
	5 (c)	WD updation on role change / compensation by the Respective Manager	EDGE Spocs	Mohit Sharma, Karishma Mehta	

- Success Story:
  - Skill based solution to cater to any turnovers in WAS group - 2 colleagues moved to WAS group via a structured process

welcome to brighter

## EDGE 2.0

Build a future-ready workforce

Skills based solutions for WAS group

**Congratulations on your new Role !**

**You did it !**

Emp Id	Name	JOB TITLE	DEPARTMENT	Location
1186039	Yogesh Kumar Chausali	Senior Specialist – Actuarial (C2 )	WAS (US Group)	Gurgaon
1257797	Sukhmani Kaur	Specialist – Actuarial (C1)	WAS (US Group)	Noida

- **#OneTeam mindset:** Fostering an inclusive and innovative culture to win over any situation. This will have an ever-lasting impact on hearts and minds of our colleagues. Trust is at the center, a culture of trust needs to be cultivated over a period of time to gain commitment from the colleagues



## Overall

- The Skill Edge program aims to equip individuals with the necessary skills and knowledge to thrive in the evolving job market. It focuses on providing training and development opportunities to enhance skills that are in high demand and will be valuable in the future.
- This program includes (and plans to evolve) training in areas such as technology, digital literacy, critical thinking, problem-solving, communication, and adaptability. The goal is to empower individuals to stay competitive and succeed in a rapidly changing workforce.
- This EDGE 2.0 upskilling initiative had a significant overall impact on the organization and act as a feeder pool for Wealth Business, addressing critical business objectives and delivering measurable benefits. Employees were equipped with the necessary skills and knowledge to meet the evolving needs of the business, resulting in improved performance, increased engagement, and enhanced innovation capabilities.
- The program also contributed to cost savings, efficiency gains, talent pipeline development, and improved customer satisfaction.

Looking ahead, the outlook for this EDGE 2.0 upskilling initiative is promising –

- The organization would continue to monitor the evolving needs of the business and adapt the upskilling program accordingly. This could involve staying updated on emerging trends and technologies, conducting regular skills assessments, and providing targeted training and development opportunities.



- Additionally, the business would continue to foster a culture of continuous learning and innovation, encouraging employees to take ownership of their development and stay ahead of industry changes.
- **Energize the experience:** Continued focus to inspire and invigorate people by redesigning the work experience
- Creating **socially responsible workforce** models: Achieving equitable future for all by redefining talent practices to stay in step with changes in the external market

Overall, the upskilling initiative has had a positive impact on the organization, addressing critical business objectives and delivering measurable benefits. By learning from the experience and continuously adapting to the changing needs of the business, the business has ensured that the upskilling program remains effective and contributes to its long-term success.



Brandon Hall Group™

**EXCELLENCE  
AWARDS™ 2024**

CASE STUDY



# About Brandon Hall Group™

With more than 10,000 clients globally and more than 30 years of delivering world-class research and advisory services, Brandon Hall Group™ is focused on developing research that drives performance in emerging and large organizations, and provides strategic insights for executives and practitioners responsible for growth and business results.

### Professional Certifications

Self-paced certification programs. Virtual group sessions for companies. In-person conferences and summits.

### Excellence Awards

Three annual programs recognize the best organizations that have successfully deployed programs to achieve measurable results.

### Membership

Individual and Enterprise Membership options: Includes research assets, advisory support, a client success plan and more.

### Advisory Offerings

Custom research projects, including surveys, focus group interviews and organizational needs assessments for transformation, technology selection and strategy.



### ENTERPRISE EXCELLENCE CERTIFICATION PROGRAM

Recognizes the best HCM programs that transform their organization and achieves breakthrough results. This designation is a step above the HCM Excellence Awards® which focuses on one program within a company. Enterprise Excellence is a hybrid of award winners who are also members.



### SMARTCHOICE® PREFERRED PROVIDER PROGRAM

Uniquely places HCM service and technology companies at the top of organizations' consideration list of vendors. It adds an unmatched level of credibility based on BHG's thirty-plus years of experience in evaluating and selecting the best solution providers for leading organizations around the world.



### AGENCY! BY BRANDON HALL GROUP™

Provides comprehensive marketing solutions for human capital management solution providers. We offer strategic services to establish a strong foundation for your marketing efforts.