



RESOURCING AND TALENT PLANNING 2022: CASE STUDIES



The CIPD is the professional body for HR and people development. The registered charity champions better work and working lives and has been setting the benchmark for excellence in people and organisation development for more than 100 years. It has almost 160,000 members across the world, provides thought leadership through independent research on the world of work, and offers professional training and accreditation for those working in HR and learning and development.

The CIPD's *Resourcing and talent planning case studies* are linked to the CIPD's *Resourcing and talent planning report*, and give examples of good resourcing and talent planning in practice. The report itself, in partnership with Omni RMS, examines resourcing and talent planning practices and the key challenges organisations are facing. It provides people professionals and their organisations with benchmarking data on important areas such as recruitment costs, workforce planning and retention. This survey was conducted online in April 2022 by YouGov. In total, 1,055 UK-based HR/people professionals responded to the survey.

Case studies

Resourcing and talent planning 2022: case studies

Contents

Sky – A data-driven model for leadership	2
Network Rail – An evidence-based, collaborative approach to workforce planning	4
NHS England NHSE – Recruiting and vaccinating at speed	7

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1 Sky - A data-driven model for leadership

Sky is Europe's leading media and entertainment company. The company operates in multiple markets and serves 23 million customers.

Sky recognised a need to develop strong leaders to support and enable employees to meet the challenges they face. Prior to 2019, they had no formal leadership model, which led to mixed expectations of what was required of leaders. They set out to define and develop the leadership qualities they needed, and responded by developing a 360 feedback tool called 'Leader Lens'.

'We wanted a clear and common standard we can hold our leaders to, so that they know what is required of them and what they need to display and demonstrate to progress through the ranks.'

Ed Smyth, Head of Talent

A data-driven model of leadership

Sky began its approach with the question, 'what does great leadership in Sky look like?'. Through focus groups and interviews with the executive team, leaders and general employees, they explored what was wanted from leaders, what the best leaders do and how it felt to be managed. From this, they developed the Leader Lens feedback tool, which focuses on specific, observable behaviours that can easily be measured and assessed, rather than more general leadership characteristics.

'We were keen to develop one model that was applicable in all our markets, therefore ensuring all our international stakeholders could contribute. Developing a consensus was an essential part of the process. We also worked closely with the Executive Team throughout the process to ensure the model was relevant and we had a clear shared understanding of what good leadership meant.'

Ed Smyth, Head of Talent

The tool was initially piloted on leaders from a sample of business units and the data was used to build a leadership model. The tool sets out what managers and peers expect from leaders (at the Director level) as well as what direct reports expect. Separating what managers/peers expect and what direct reports expect means, there are more elements in the model. But Sky felt this more accurately represents what it means to be a leader. Efforts have been made to avoid bias through the use of a language checker and gender score comparisons. Factor analysis, reliability comparisons and validity assessments (i.e. correlating leader behaviour items with employee engagement scores) are used to refine the model and ensure that it drives the desired behaviours and outcomes. There was an ongoing analysis of the data collected ensuring continuing relevance and insights to inform talent planning and decision making.

'We have a lot of credibility because the model is data-driven. So when we go back to the business and say these are the three leadership behaviours that are most powerful or have the strongest link with engagement, it's evidence-based and people really appreciate that.'

Ed Smyth, Head of Talent

Assessing potential and developing leaders

Analysis has shown that the Leader Lens explains 58% of the variance in leaders' People Survey engagement scores. It has also enabled Sky to identify the behaviours that are

most predictive of engagement scores. The data-driven approach means leaders take their feedback on Leader Lens seriously because it strongly predicts engagement.

Leader Lens data is also used to identify behaviours that differentiate high performers from other leaders, as well as behaviours that differentiate the top quartile of leaders with the second quartile. This data is helping Sky build a more robust way of assessing potential and helping them identify development areas and build action plans. This has included resurrecting its 'Better Coach' programme, which had been put on hold.

Helping leaders interpret their Leader Lens report is an important part of the process.

'We've found that it's important to do a really good job of debriefing and helping people interpret their feedback report. You can't just email it out no matter how simple you make it – some sort of interaction is needed.'

Ed Smyth, Head of Talent

This takes the form of one-to-one coaching sessions or group sessions with up to 20 leaders. Facilitators explain the model, how to interpret the report and what to look for. Break-out groups meanwhile enable peer-to-peer coaching on specific issues that arise from the results.

Leaders are encouraged to take ownership of their development by using the report to identify key actions or learning and to review with their team how they work together. Common themes include delegating more, flexing their style to accommodate different preferences of team members, and giving peers more visibility into their work. They are sent regular email nudges to remind them to review their Leader Lens results and the actions they have committed to as a result.

Outcomes and ongoing value

The Leader Lens tool was built entirely in-house and reflects Sky's unique leadership culture. Moving forward, Sky is planning to build on the success of the model by adapting it for use with middle managers.

The Leader Lens continues to generate huge amounts of insight to inform decision-making and planning. In addition to guiding development, the data is also used, alongside other measures, to assess an individual's readiness to progress to more senior roles.

'Stepping up to a more senior role can mean managing a bigger team with the additional challenges that entails. The team feedback from the Leader Lens can tell us a lot about how well they might manage that and their ability to get the best out of people.'

Ed Smyth, Head of Talent

The leadership model is also helpful in the recruitment process. Recruitment assessments and psychometrics are mapped to desired leadership behaviours to provide insight on potential candidates.

The value of the Leader Lens is further demonstrated by its popularity among leaders. On average they scored 9.2 when asked to rate on a scale of 1-10 whether they'd recommend Leader Lens to a colleague. The Talent team has also received a lot of anecdotal feedback about the progress that leaders have made.

'People appreciate the opportunity to get feedback and we didn't have a consistent way for that to happen up until now. The model has created a common language and a shared and clear understanding of what good leadership looks like across all departments and markets. Having that clarity and consistency of expectations is essential to drive the leadership behaviours we need.'

Ed Smyth, Head of Talent

2 Network Rail – An evidence-based, collaborative approach to workforce planning

Network Rail owns, operates and develops Britain's railway infrastructure. It employs around 45,000 people.

Network Rail were experiencing significant challenges in the attraction, recruitment and development of signallers. The overall time to recruit and train signallers was 12 months, and high turnover meant line managers were struggling with challenging vacancy gaps. This was increasing overtime costs, having a negative effect on wellbeing, engagement and safety and impacting overall performance. There was a severe lack of clear career paths and talent development in the roles and poor diversity representation.

Network Rail committed to creating a forward-thinking approach to workforce planning which ensured they had the right person at the right time in these safety critical roles.

'At Network Rail, our talent strategy is getting to know our people. We are committed to understanding the potential of our entire workforce from passenger facing front line to senior executive roles. We are becoming a company that is on the side of passengers and freight users, building a more diverse and inclusive organisation representative of the passengers we serve. To do this, it's essential we become a more open, diverse and inclusive organisation, harnessing the skills and expertise of all our people and attracting the best talent to help us have a safe, accessible railway for everyone.'

Erika Diaz, Talent Consultant

An evidence-based, collaborative approach

To inform their approach, Network Rail adopted a systems thinking methodology to explore the root of the problem from the view of those experiencing the issues. Insights were gathered through a variety of qualitative and quantitative data sources including: job shadowing, observations, face-to-face interviews, online surveys, role profiling and business performance data.

'Initially, we thought the problem was just related to external recruitment – the challenge of finding people and the time it took to recruit and train them to competence. From our research we identified that 75% of recruitment is actually internal. People were leaving a position in one part of the organisation to go for another but we were not able to anticipate the moves to strategically mobilise our people to our business demand. It caused problems because it wasn't anticipated or planned for. We realised we needed to focus on talent management solutions not just external recruitment.'

Erika Diaz, Talent Consultant

Erika also believes that involving managers and signallers early on in the process was very powerful in gathering their support and engagement.

'Their feedback told us this changed their perception of HR as a top-down function that issued processes they had to follow, without necessarily understanding the benefits, to one they could work with to address the problems they were facing. They said they really felt listened to and involved in the solutions.'

Erika Diaz, Talent Consultant

Colleagues from multi-disciplinary teams (HR, National/Local Trade Union Reps, Operations, Finance, Resourcing and Training) then worked together to identify how they could work better together to resolve the issues and develop a workforce planning approach to anticipate and plan for talent requirements. They formed a Strategic Talent Forum for ongoing strategic planning, learning and reviews.

The insights gained from the research and conversations were used to develop a new talent management model for signallers aligned with the organisation's strategic objectives. This was successfully piloted on the North and East route, which has around 588 signallers, and is now being rolled out throughout the organisation.

Regular career conversations

A Career Conversation training programme was designed to upskill and equip line managers with practical tools to improve the inclusivity, quality and consistency of career conversations, utilising a coaching approach to empower rather than manage employees' careers.

Recognising that employees might not have the confidence to know their suitability for potential roles, the organisation has developed a new and aligned career development portal that provides support to all employees and empowers career ownership and development. The organisation provides interactive career ladders, career guides, awareness of skills and qualities needed to help inform career direction, and bespoke podcasts/videos to help get the most out of having a career development conversation. The organisation has also established clear career paths so that signallers are aware of the options available to them. These detail the competences, skills, etc., needed to progress and how these can be developed.

Network Rail wants to move to a position where career conversations are driven by the employee when they have the aspiration or feel ready to progress rather than specify how often they should take place. Although, as a general principle, it recommends these take place twice a year.

Talent Insights Dashboard

Network Rail has designed a Talents Insights Dashboard to record data points from career conversations regarding employees' aspirations, potential and readiness to progress, relocate, cover emergency positions, etc. The business area now has clear sight of their internal talent pool and a robust resource pool for future moves. The insights have spotlighted capability gaps against future demand and re-signalling schemes to inform mid/long-term recruitment plans and training requirements. The Dashboard has also highlighted diversity and inclusion challenges, with visual representation of the diversity pipeline and this has informed strategic people plans.

'We can now be proactive in planning for future needs, including approaching people internally who may be interested in positions that are coming up and initiate any training required. In the first six months of the trial, 65% of signallers in the North and East had career conversations with their line managers and, as a consequence of sharing that data, 28% were moved to a higher grade roles. This proactive approach has really impacted their engagement.'

Erika Diaz, Talent Consultant

A planned approach to external recruitment

Improved knowledge of their current talent pipeline and collaborative forward planning means that the organisation can take a more strategic approach to external recruitment

and avoid the ad-hoc efforts to quickly fill gaps of the past. The organisation has been able to target more diverse groups of potential applicants through specific advertising platforms, such as running Q&A sessions on Facebook where line managers shared insights about the day in the life of a Signaller and the different opportunities available. They have also designed an express of interest site, which has benefited assessment and training time and costs.

Outcomes

- Findings from the employee feedback survey show improvements in employee engagement and greater clarity from signallers regarding how they can progress within the organisation. 65% of signallers have had a career conversation within the last six months and expressed that they have been able to have open conversations with their line managers about aspirations and what they would like to do to progress their careers at Network Rail.
- 85% of managers found Talent Forums helped them understand how to better manage internal talent. They report they now have a strategic view of how to better recruit. The Head of Operations commented: ‘This is exactly what I want from the national HR Talent team... I’m really excited by this project, because it is driving the conversations we should always have been having with our signallers which will not only improve our resourcing pipeline but lift engagement too.’
- End-to-end time of Signaller attraction, recruitment, assessment, and training has reduced by 50%.
- Diversity of external appointments has increased: BAME representation from 1% to 9% and female representation from 3% to 12% in the latest external Signaller recruitment intake.
- In the first six months of the trial, career conversations captured predictive talent insights, aspirations and potential data for 588 signallers. As a direct consequence, 28% of high potentials identified have been promoted through proactive intervention.
- Through avoiding the expense of ‘premium hours’ spent covering vacancy gaps, the organisation anticipates a saving of £1.2 million over three years.

‘Our approach has really resulted in a significant shift in culture – far greater than simply implementing a process. We are continuing to work together with directors and line managers to enable a more proactive approach to resource planning and embed practices to support employee development. Our focus is now to connect with the wider industry, including train, rail operating companies and government bodies, to share our best practice and to further shape the wider industry talent and succession landscape.’

Erika Diaz, Talent Consultant

3 NHS England NHSE – Recruiting and vaccinating at speed

NHS England help improve care for patients and provide leadership and support to the wider NHS. As part of their response to the COVID-19 pandemic, they launched an urgent national campaign to recruit vaccinators and support staff to deliver the vaccine programme. They worked in partnership with the Royal Voluntary Service and St. John Ambulance to recruit tens of thousands of volunteers for roles such as admin and stewarding.

The scale and urgency of the vaccination programme also required recruitment campaigns at the local level for each integrated care system. The London Region, which includes 30 NHS Trusts and hundreds of individual primary care employers, faced the unprecedented challenge of coming together to urgently recruit, onboard and train 10,000 new staff, on top of those recruited under the national campaign.

A collaborative approach

Key subject matter experts were drafted in from the wider NHS system to form a London ‘workforce cell’ and work together as a cohesive team within NHSE. Representatives from the five geographically-based care systems in London also came together for the first time to work in partnership with the cell. This collaborative approach ensured consistency and synced up messaging across the whole region, and reduced replication of effort and resources. They used standardised job descriptions and pay across the whole of London, developed standard adverts and advertised at the same time to reduce the likelihood of candidates applying through multiple systems.

Daily ‘huddle’ meetings were held to share the latest intelligence from the national NHSE team and best practice so this could be replicated across the five areas. This was coupled with regular meetings with HR leads in order to share information, support implementation and resolve concerns and queries.

Regular workforce data modelling established how many workers by role were needed and where. The London Staff Movement Agreement (LSMA) and ‘mutual aid’ arrangements allowed staff to be deployed wherever they were most needed, to ensure the highest level of service at all times.

‘Everyone really wanted to help each other. If someone was particular good at something they would share that information. People were constantly sharing what was working well and learning from each other.’

Chris Goodhand, Senior Workforce Lead

Strong focus on recruiting from local communities

There was a strong focus on recruiting from local communities, including people furloughed, people identified by local authorities as seeking employment and underrepresented groups. It was essential that staff at the vaccination centres reflected their communities to reduce vaccine hesitancy.

‘We wanted our staff to reflect the diverse communities of London and to be able to communicate effectively with them. For example, there are several big building sites in London with a lot of workers from Eastern Europe. We’d run pop up vaccination centres on those sites and wanted to make sure we had staff they could speak to in their own language to encourage trust and uptake.’

Chris Goodhand, Senior Workforce Lead

To attract the staff needed more quickly, NHSE engaged social media and the support of many groups, businesses and organisations in their local communities including St. John Ambulance, JobCentre Plus, Greater London Authority, London First, WeWork, various faith leaders, RefuAid, Tattoo Artists, airlines, to name just a few. Adverts were also placed in the vaccination centres as they opened up to maintain and increase the local workforce.

'It was a really good way for the local community to see adverts and talk to staff who were already in roles - we got a lot of interest through that.'

Jodie Gardiner, Head of Workforce and OD

Streamlining recruitment and training

A chatbot was implemented to inform, direct and process applicants, including conducting initial assessments and pre-employment checks. This enabled speedy processing of applicants (28,000 applications were received in just one weekend), reduced the administrative burden on staff and improved the experience of applicants. This technology is now being used nationally for the redeployment and retention programme.

Competency frameworks were developed for all roles and NHSE worked with Health Education England to develop training. New recruits completed online and face-to-face training and onboarding within days.

Maintaining engagement and wellbeing

New recruits were highly motivated to support the national effort to combat the COVID-19 and the team were keen to maintain this with a strong focus on their health and wellbeing through both busy and quiet periods in the vaccination centres. Wellbeing hubs were created where staff could go to rest in comfortable chairs and be waited on with tea, coffee and magazines. These were supported by 'Project Wingman' which used the excellent customer service skills of furloughed airline employees in the hubs to look after staff.

Quieter periods were used to upskill staff and train them in all the different roles (maintaining engagement whilst also creating a more flexible workforce), or to promote a positive work environment through health and wellbeing activities (including a ping-pong tournament).

Retention

Robust retention plans and career pathways have been developed for the new workforce and a talent pool of those interested in a longer term career in the NHS has been created. Over 2,000 one-to-one career conversations have been conducted to help establish individuals' interests and skills and match them to roles, career pathways and vacancies.

Events and webinars provide the new workforce with information about different careers and professions in the NHS and social care. Those interested are supported with the application process, including training in interview skills.

'Recruitment in the NHS can be quite different from other professions so we are trying to support people through the process and give them the best chance of succeeding.'

Jodie Gardiner, Head of Workforce and OD

Outcomes

- ICS system colleagues processed more than 50,000 applications and recruited, onboarded and trained over 10,000 new staff for the vaccination programme within a matter of weeks.

- 53% of recruits to the vaccination programme were from ethnic minority backgrounds (40% of London residents identify as belonging to ethnic minorities). An even higher proportion of staff redeployed to longer term roles through the retention programme are ethnic minorities. These high figures are attributed to a strong focus on equality, diversity and inclusion through the process, more flexible recruitment processes and the support provided through the retention programme to redeploy to longer term roles.
- The vaccination programme has successfully retained a flexible workforce of thousands to deliver the service required through fluctuations in demand. This included doubling the workforce overnight through established channels and contacts when Omicron hit in December 2021.
- To date, 25% of those interested in a longer-term career in the NHS (about 1,000 people) have been retained in substantive or long-term placements outside of vaccination.
- *'The vaccination recruitment has helped us attract people who would not otherwise have considered working in the NHS, with clear mutual benefits. One of our vaccinators, for example, has gone on to a permanent role in the HR team at Chelsea and Westminster and has since developed an incredible workforce planning tool which we're now looking to deploy nationally.'* Jodie Gardiner, Head of Workforce and OD
- Over 18 million vaccines have been delivered to Londoners, saving thousands of lives.
- *'It was the equivalent of recruiting a big acute trust in London within a few weeks. There was no room for failure. We had to do it to save lives and there is nothing more motivating. Moving forward, one of the real benefits that has come out of this is the greater partnership between our lead employers, primary care, social care and also community pharmacy. We have never worked so collaboratively before and now we are looking at how we can build on that.'* Jodie Gardiner, Head of Workforce and OD



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