

LEARNING AND SKILLS AT WORK **2021: CASE STUDIES**

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Learning and skills at work 2021: case studies

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1 Introduction

Continuous learning and skills development are vital ingredients that fuel individual growth and career progress. At an organisational level, sustained investment in people development will, by the same token, be critical for firms in fueling their growth and securing their futures.

But however well conceived learning and development (L&D) strategies would have been for any organisation, the COVID-19 pandemic has proven just how volatile, uncertain, complex and ambiguous the operating context can be.

Almost overnight, the pandemic has changed not just the way people and organisations work, but how they learn and also the kinds of skills they need now and in the foreseeable future.

L&D professionals and teams have faced particular pressure, not least from cuts to budgets in many instances, but also in dealing with the sudden and sweeping changes to learning delivery, given the massive shift to remote working and restrictions around in-person, face-to-face learning.

Produced in partnership with Accenture, our extensive [Learning and skills at work survey 2021](#) report, which included a sample of over 1,200 respondents, aims to examine the organisational approaches to learning and skills and how they may have changed over the course of the past year, to provide learning professionals and senior leaders with evidence-led recommendations to transform the learning provision within their context.

To complement this research, we have also spoken in detail with seven organisations to see up close how the pandemic has impacted their L&D, how they have responded to the challenges and the lessons they have learned along the way. Their experiences will serve as helpful examples for other organisations looking to steer their course through what may be a protracted and complex post-pandemic recovery.

2 Pepper Group – being ‘can do’, balanced and real

Background

Pepper (UK) Limited (PUK) is a loan servicer and real estate asset manager based in the UK, providing tailored services to investor and banking clients, currently managing over £17 billion of assets. The company is part of Pepper Group, a diversified global consumer finance business, with a core focus and strong experience in lending, advisory and asset management across the residential and commercial property sectors.

PUK employs around 250 colleagues and is headquartered in Uxbridge, West London, with a satellite office in Skipton, North Yorkshire. Its HR team brings together HR, L&D, communications and facilities colleagues.

Business challenges to Pepper UK in 2020

As a firm regulated by the Financial Conduct Authority (FCA), PUK has a requirement to ensure that its staff are competent at all times. Even before the impact of the pandemic, PUK’s L&D leader had scoped out a detailed annual plan that included regulatory, ‘Close the Loop’ and developmental training. The challenge for the business in 2020 was fourfold, and there was a tireless effort from all to ensure that all objectives were delivered well despite the disruption caused by the pandemic:

- 1 Rapidly transition all employees to remote working in a compliant way that met the requirements of the regulators.
- 2 Get colleagues up to speed quickly with new mortgage payment holiday requirements at the same time as delivering a robust process to support vulnerable customers.
- 3 Manage the exponential increase in customer calls and enquiries following the announcement of the payment holiday initiative. This included colleagues from support functions stepping into the

operations on a temporary basis to support the volume of work. These colleagues needed to be trained – some of them from scratch.

- 4 Keep colleagues feeling connected. This challenge covered IT logistics, including laptops, phone systems and broadband, as well as a skeleton staff in the office, but critically the wellbeing of all their people at a time of national crisis:

We were asking more of our people than we ever had before, across all functions and departments, and we were in new territory with guidelines changing constantly. We needed to ensure our people were equipped to handle the challenges of both the volume and nature of the business activity, and the unprecedented difficulties being experienced nationally on all levels.

What did L&D look like and how ready was PUK to respond?

PUK was fortunate that it already had a well-established L&D team in place, most of whom had joined from the operational side of the business. This meant that the L&D leader had first-hand experience of the life of an employee dealing with customers on a daily basis, and it also supported the company's commitment to growing its own talent. PUK also benefited from having strong systems and processes in place to support organisational learning and development, including:

- an intensive induction programme that seeks to equip already experienced, high-calibre individuals with the skillset essential for operating within the Pepper business
- a customised apprenticeship programme for employees who join with high potential but low experience
- annual training plans for all staff, with internal and external training offered, including certified and accredited provision
- the Pepper Success Learning Management System, established in 2018 to support ongoing self-development
- subject-matter experts delivering 'on the floor' training for new recruits and employees with capability gaps.

Focus on employee wellbeing

Supporting employee wellbeing has always been a priority at Pepper, but as the extent of lockdown became clearer, it recognised that additional help was needed. Considering this, it launched a new employee wellbeing programme, designed to support employees in Cyprus, Greece, Ireland, Spain and the UK.

Acting fast was critical, and by living up to one of Pepper's core values – 'Can do' – it accelerated rollout in ways that were not previously considered possible. For example, its Wellbeing Hub was conceived, designed, tested and launched in just three weeks.

Three key principles guided the development of the support offer:

- ensuring employees have full access to wellbeing tools and signposting
- maintaining connection in the new, socially distanced world of work
- equipping managers to lead their people through the challenges being faced.

The result was its PES People Matter programme, based on the [CIPD's principles-led Profession Map](#) and aligned to the three key themes of wellbeing, connections and leadership. It comprised three elements:

- People Matter Wellbeing Hub – a one-stop shop for news and information to inform and equip employees and to support their physical and mental wellbeing.

- Weekly pulse survey – giving employees a voice and providing instant insights to help managers to make improvements.
- Weekly mental health online check-ins – assesses employees’ mental wellbeing, helps managers proactively pinpoint individuals in need of support and guides them to provide effective, targeted support to the right people at the right time. This might be by simply giving them a call, signposting them to Pepper’s employee assistance programme, or by connecting them to professional wellbeing support.

This approach has led to unprecedented levels of engagement, with the feedback from employees a powerful endorsement that the organisation has made the right investment of time, money and resources to ensure that at Pepper, people matter.

Top tips for practitioners

- **Communication is key** – bringing communications into the HR team has been a real game-changer for Pepper Group and has increased employee engagement and impact: *‘It’s not just about having a great idea; if it is not communicated well, it’s not going to land.’*
- **The importance of trust, transparency and openness** – creating an environment where people feel valued and trusted is key. This means being visible, transparent and open across the whole of the organisation, from the top down.
- **Embracing the ‘art of the possible’** – while the pandemic has caused significant disruption and challenge, it has also demonstrated that it is possible to deliver large-scale change successfully and at pace.
- **Look internally for the skills you need in your L&D team** – Pepper’s HR team includes individuals who have come from operational roles, which means that they really understand the business and have immediate credibility when speaking with managers.

Making sense of complex change

How did the CIPD Profession Map help break down silos of traditional roles and focus on business outcome?

‘The CIPD’s Profession Map provided guide rails for our people, not just in HR, but also following the principals of Work Matters, Professionalism Matters, People Matter as a map for the delivery across L&D, HR, Facilities and Wellbeing that we had in the period.’

‘We used it extensively to create a pathway for HR and L&D teams and expanded it to fit the needs of our business in terms of escalation points based on role, as well as development opportunities. We also used it to feed content for our SMCR regime activities.’

What did this look like and what was achieved?

‘In summary, the PES People Matter programme had activity throughout the year, including the launch of a wellbeing intranet across five countries. In terms of outcomes, our employee engagement (Office Vibe) score has steadily increased, as has our Glassdoor score.’

To what extent has this structure helped you during the pandemic?

‘This is a road map for us, an anchor to which we can return and use to guide not only development of current successful initiatives, but also as a litmus test for new ideas that we bring to the table – and right now all the ideas are new – even the old ones, because the world has changed, so we revisit everything with a fresh perspective.’

3 Santander – responding quickly, proactively to evolving financial crime

Background

Santander UK plc, part of the Santander Group, is a leading financial services provider in the UK, offering a wide range of personal and commercial financial products and services. Across the UK it employs almost 23,000, serving 25 million customers via a nationwide branch network and telephone, mobile and online banking.

Tackling the challenge of financial crime

As the age of automation jets further forward, financial institutions must deal with increasingly sophisticated financial crime and rapidly evolving regulation. Financial institutions like Santander must be proactive in preventing and responding to financial crime – by detecting suspicious activity early, taking appropriate action quickly, and efficiently addressing gaps in systems and processes to prevent such crimes being committed again.

Santander UK is committed to building the right level of anti-financial crime (AFC) capability in its organisation to protect its customers, shareholders and society from financial crime and demonstrate to regulators that Santander UK has a strong AFC capability development framework and learning offering which underpin a skilled workforce.

Development of the Anti-Financial Crime Academy

To respond to this rapidly evolving threat and regulatory context, Santander UK has worked at pace to ensure that colleagues have the right level of skills and knowledge at all levels within the bank to deter, detect and disrupt financial crime.

Understanding the skills requirements and deficits

Taking a risk-based approach, the first step to developing a learning curriculum was to build an in-depth understanding of the skill and knowledge requirements for teams and levels across the bank and to identify skills strengths and gaps and the learning required to address needs.

Leveraging technology, Santander UK used an AI-based skills assessment to rapidly identify skill requirements and knowledge gaps, enabling it to understand quickly where learning development should be focused.

Developing the co-ordinated learning offer

In addition to the pre-existing Santander UK training programme and learning strategy, the Anti-Financial Crime Academy (AFCA) was established in 2020 to provide support and guidance to Santander UK employees and ensure they are suitably equipped to fight financial crime and be the bank's best form of defence.

The ambition was to create and drive:

- a consistent and optimised anti-financial crime curriculum for a cost-efficient, role-based learning experience
- a robust and sustainable operating model and governance structure to comprehensively manage, monitor and evolve the AFCA new learning analytics approach, enabling business outcomes through the use of both descriptive and predictive learning analytics
- focus on highly relevant financial crime topics, such as anti-money laundering and sanctions, anti-bribery, corruption and facilitation of tax evasion, with priority given to those areas where there is the largest gap in competency

- a flexible learning platform/academy architecture that can be kept up to date with modern financial crime typologies and evolving threat patterns.

The Anti-Financial Crime Team is focused on protecting customers, communities and shareholders from increasingly complex threats. The AFCA is central to this and enables Santander UK employees to develop and enhance their knowledge and skills to perform their roles with the aim of deterring, detecting and disrupting financial crime within the bank's customer base.

The AFCA is a flexible learning solution that can be kept up to date with modern financial crime typologies and evolving threat patterns. The AFCA allows Santander UK employees to develop the right skills and capabilities to fulfil the bank's anti-financial crime commitments.

Visibility, consistency, sponsorship, governance

The one-stop-shop nature of the academy made it really visible across the bank, and centralisation of governance means that we could track the learning that was happening and make sure that it was to the right standard. Sponsorship from the Money Laundering Reporting Officer further raised its visibility and profile. The cultural workstream within the AFCA allowed us to focus on behaviours and embedding the learning, as well as on how to drive accountability and ownership for tackling financial crime across the bank.

What was achieved?

The Anti-Financial Crime Academy has been set up to tie back to key business metrics as well as tracking learning impact via the Kirkpatrick evaluation model. The academy has only been up and running since the end of 2020; however, initial evidence gathered on completion rates and learner assessment highlight positive results:

- 98% completion rate made by target date for sanctions modules
- 89% either agree or strongly agree that they would recommend the learning to colleagues
- 83% either agree or strongly agree that they have learned new knowledge and skills
- 88% either agree or strongly agree that the learning was well structured and/or engaging.

Top tips for working at pace

- **Harness technology** – Santander UK used an AI-based skills assessment to rapidly identify skill requirements and capability gaps, and provide insights needed to drive decision-making.
- **Set expectations** about what the learning is going to look like up front; reuse and repurpose existing content.
- **Partner with the internal and external experts** – the creation of the AFCA was led by an internal subject-matter expert with over 17 years' experience of working in the bank to tackle financial crime. Partnering with external consultants enabled Santander UK to harness external knowledge and expertise, and enabled it to deliver at pace.
- **Address the right level of risk** – make sure that the learning offer takes a risk-based approach, focusing on where the highest risks exist and need to be closed.
- **Visibility and sponsorship** – learning engagement and behaviour change has been driven from the top: *'The message from top down is that we all have to understand, and be ready to respond proactively, on future risk. It's about building accountability and ownership bank wide.'*

4 Barchester Healthcare – from responsive to proactive L&D

Background

Barchester Healthcare Ltd is an independent care provider in the UK, running over 240 care homes and six registered hospitals across the country. Employing over 18,000 people, it specialises in delivering top-quality care, both residential and nursing, to the people living in its homes and hospitals.

Operational context and challenges

With the UK population growing older, living longer, and suffering from an ever-increasing range of conditions, the demand and need for good-quality care has never been higher. Yet the care sector as a whole faces several workforce challenges, with frequent reference made to a shortage of nurses in both the NHS and adult social care, higher rates of workforce turnover and hard-to-fill vacancies. Alongside this, the sector faces increased regulatory pressure and scrutiny, growing competition, as well as pressure on resources.

Barchester Healthcare's primary focus is 'quality first' – the quality of care for its residents and patients comes first before everything. To achieve this, as well as maintain company performance, it needs to ensure it is attracting, retaining, developing and ensuring the best performance from its talent.

The company's vision and strategy are set out in its people strategy, *Together, People Make Barchester*, which was developed in response to Barchester's business strategy, workforce planning, exit interview feedback, staff engagement survey feedback and current staff focus groups. Its priorities include:

- the retention and development of senior leaders (general managers and hospital directors)
- becoming a nurse employer of choice and therefore increasing retention of nurses
- accrediting care practitioners
- reducing the reliance on agency workers.

What did L&D look like and how ready was Barchester to respond?

The COVID-19 pandemic had several impacts on Barchester's workforce, from the need to introduce tighter infection controls, to ensuring that it had enough staff in place to maintain the delivery of high-quality care at a time when some employees were having to shield or isolate.

Barchester had already introduced several changes that allowed it to respond effectively to the challenges of the COVID-19 pandemic:

- **Visibility at board, senior management team, regional and divisional director level** of people priorities and metrics. To track performance against its key people priorities, Barchester created a People Dashboard, which provides visibility at board and senior level of the progress of its people strategy.
- The creation of a **Workforce Committee** – introduced in early 2019 as part of Barchester's Clinical Governance Framework – that enabled Barchester to draw a direct correlation between its people and the quality of care being delivered and assessed by the regulator. It also ensured compliance with the regulatory frameworks across the four territories (England, Scotland, Wales and Jersey).
- **Transparency of career pathways and innovative extra programmes** – Barchester created career pathways for clinical, leadership and hospitality careers. These road maps clearly set out progression pathways and what skills, experience and qualifications are needed at each level. In addition, it developed innovative programmes to support retention and progression of its senior carers (more detail below).

- **Creative use of data** – while there was not a lack of data being collected by HR, it was held in a way that didn't allow the company to look at correlations or causations. Getting everything on to a digital learning platform allowed it to really understand the employee journey and the impact of learning interventions and identify where to target resources to address performance issues.

Alongside this, it had in place an L&D offer to ensure that individuals and teams were both competent and confident in the delivery of high-quality care to residents and patients, which included:

- statutory and mandatory training to ensure compliance with regulations
- apprenticeships that provide industry-recognised qualifications
- clinical development to support retention and development of nursing staff
- operational management and leadership development
- a continuous learning culture was set within its Clinical Governance Framework.

How did Barchester adapt during the pandemic?

The L&D team at Barchester worked tirelessly, in close collaboration with operational leaders and their colleagues in recruitment, ES and internal comms, throughout the pandemic to ensure that operations had sufficient, and sufficiently trained, staff to continue to deliver high-quality care. Fortunately, because of existing infrastructure, as well as the changes previously made, it was in a really good position straight away. It adapted its approach in the following ways:

- converted all face-to-face learning and competency assessment to e-learning and enabled e-learning induction to be completed prior to joining to enable faster onboarding
- adapted the digital platform to provide training to over 650 volunteers
- developed a skills matrix for front-line roles so the additional training could be provided to reskill to enable cover in areas where there may have been staff shortages
- accelerated the development of over 90 care practitioners who were mid-programme
- developed bite-sized leadership training to ensure that they were equipped and supported to lead in challenging times
- established an advanced carer programme to enable senior carers to step up and support if there were nurse or care practitioner shortages.

What was achieved?

The results speak for themselves: during the pandemic it has had no crises in staffing, and in some areas, the use of agency staff is down to zero. Overall, its approach has achieved significant improvements, which include:

- nurse turnover declined by almost 10 percentage points over the past 18 months
- over the same period, employee satisfaction with training has increased from 72% to 85%
- quality of care – as assessed by the regulator – has gone from 68.4% Good or Outstanding to 88.3% (January 2017 to April 2021).

Top tips for adapting L&D

- **Harness the power of data** – the L&D team at Barchester harnessed the power of data to really get to the heart of performance-related issues and design and provide the right solution to address the need.
- **Use data to demonstrate the value of learning** – position learning as above the line by showcasing how you are putting something back into the pot.

- **Use the right language** – it's important to get buy-in to the vision by demonstrating the benefits in operational terms rather than just because it's good or best practice.
- **Engage and motivate** by creating transparent ways to show your people how they can develop their careers.
- **Look for inspiration everywhere** – *'Sometimes with learning and development we look for inspiration from the L&D profession, but adapting models and ideas from other professions and outside of our industry can work well.'*

Creating career pathways – care practitioners

As with the wider sector, retention of carers and nurses is a well-documented challenge. However, looking at the exit data alone was not giving Barchester a full enough picture of the reason why turnover was high, so it worked to understand in more detail by, among other things, contacting staff who had left, conducting pulse surveys and focus groups.

Some nurses were frustrated with the lack of support, amount of documentation and some senior carers were equally frustrated at the lack of progression and training to enable them to support their nurse colleagues.

The creation of two new steps on the clinical career pathway enabled the company to address these twin challenges. Its advanced carer and care practitioner roles give senior carers the opportunity to develop their career through a nurse-mentor training programme (including qualification) and significant extra training, designed to enable them to take on additional duties to support nurses.

The types of duties taught include administering some medicines, physiological assessments, simple wound dressing and care plan documentation for residents. Unlike similar roles, the care practitioner role has a nurse mentor, protected training time and is underpinned by five VQ units.

Barchester has now trained over 300 care practitioners. A recent survey indicated that many now wanted to build their clinical skills further or aspired to become nurses. The L&D team is now looking at an advanced care practitioner role that would map onto the nurse degree programme.

5 RHP – building future leadership skills

Background

RHP is a housing association with just under 250 employees, operating across West London. It is not-for-profit, driven by a strong social purpose to provide homes for people who would otherwise be unable to afford to live locally. It has about 10,000 homes across London that it either owns or manages the service. Most of the housing is a mix of shared ownership and social rent, which means a mix of customers and customer need.

Its People and Engagement Team brings together L&D, HR and communications. The team is made up of two people in L&D, five people in HR (including an apprentice) and five people in communications, who report directly into the head of people and engagement.

Challenge to develop current and future leadership

High-quality leadership and people management is critical to organisational success: it means that employees are more engaged, more committed and more productive, which then translates into higher employee retention, reduced absenteeism and improvements in service quality, customer satisfaction and overall performance.

RHP recognised that to achieve its five-year strategic goals, it needed to develop more consistent leadership capability across the organisation and develop a stronger pipeline for future managers.

Evidence used to support programme development

Looking at internal and external sources, it identified the growing importance of emotional intelligence and empathy as the fundamental skills that set people apart and that would become more important in the future. It also looked at the types of programmes that were successful at building these skills and identified a clear gap in support: *'We had a coaching gap; there was not a consistent coaching culture.'*

One of the key internal pieces of people data RHP used was evidence obtained from exit interviews. While RHP has a relatively low turnover overall, it found that some of its people were leaving because they felt that there was nowhere for them to progress internally, and while it recognises that not everyone will want to stay, it also wants to keep talented people in the organisation. Alongside this, RHP drew on outputs from the talent reviews conducted by HR business partners and employee engagement surveys, and used follow-up interviews with managers and employees to really *'get under the skin of the data'*.

The Luminous leadership programme

The 'Luminous' leadership programme was developed in-house and is delivered via a mix of internal and external facilitators. The programme, available for all employees, is provided at three different levels, which means that everyone from aspiring managers to senior leaders has access to the learning at the right level for them. Each quarter has a different theme, including: coaching, high-performing teams, looking after the money, and decision-making and problem-solving.

The programme aims to bring learning to life in creative and memorable formats, including Luminous Lunches, book clubs, external speaker programme and even an escape room to explore problem-solving. Where there is classroom-based learning, it's delivered in bite-size sessions and there's a significant emphasis on activities to follow up and embed the learning. To create a buzz around the programme and increase engagement, RHP thought creatively about branding. This resulted in the brand 'Luminous: light the way for others', and at launch, everyone who attended the first session was given a lightbox.

The leadership programme is assured by City & Guilds and ILM, which recognises world-class in-house training, and has been assessed against best practice standards with five key components:

- design and delivery
- planning and management
- employee/learner support/quality assurance
- evaluation
- continuous assessment.

The assurance process has helped RHP demonstrate impact – employees need to demonstrate how they've embedded the learning, and how it has improved performance. It has identified tangible examples of how improved leadership capability has translated into business results.

What was achieved?

The programme achieved significant positive results:

- **An increase in coaching skills** – it has seen a real shift in coaching skills, with increased employee satisfaction on coaching received from managers, as demonstrated by employee surveys.
- **Improvement in customer satisfaction** – through assurance conversations, employees identified numerous ways of how they've applied their learning to improve customer experience. This has helped improved RHP's Trust Pilot reviews and scores, reducing call drop-off rates and handling complaints.
- **Increased employee engagement** – participation also identified how an increase in leadership capability has helped with engagement within teams. Employee engagement scores have increased from 85% to 94% over a 12-month period.
- **Employee progression** – as well as developing the leadership skills of current leaders, the programme supported aspiring leaders to move on to management roles. Within a 12-month period, four employees progressed to a higher role as a result of the programme.

Beyond this the programme has had a number of wider impacts. One example of this has been the opening up of career conversations in the organisation, giving employees the confidence to have discussions about their future careers, both inside and outside RHP. The programme has helped create an environment where employees feel able, and encouraged, to take accountability to start the conversation: *'It is really powerful where the whole team has gone on it.'*

How did RHP adapt what it was doing during the pandemic?

Before the pandemic, RHP was predominantly office based, and it views the leadership programme as crucial in laying the foundations to transition successfully to a remote working and learning culture, with core coaching skills coming into their own.

The programme itself is in its second year, having had to shift to virtual delivery. The original format of the programme lent itself to virtual delivery and attendance has actually increased. However, it had to adapt what it did, for instance by facilitating online communities to create a buzz around the programme and to encourage feedback. Delivery was further adapted to reduce screen time, for instance by shifting 'lunch and learn' sessions to the morning, and using resources such as podcasts so that people could tune in anytime, such as out on a walk, and wouldn't have to be in front of a screen.

Tops tips for practitioners

- **Find creative ways to bring learning to life** – RHP uses a mixture of delivery approaches to bring the learning to life, to make it memorable, drive engagement and embed the learning. These include workshops, book clubs, speaker programmes, podcasts, problem-solving games.
- **More, little, and often** – feedback from managers showed that many felt they did not have the time for learning, so think about the length of sessions with bite-sized chunks that can be followed up later.
- **Working with internal and external partners** – one of the key takeaways for RHP was working with its communications team to help bring the programme to life in a fun and engaging way throughout the programme. It also worked with internal subject-matter experts to build and deliver some of the learning content, which made the learning relevant to the business.
- **Instil trust, add credibility, and boost engagement through accrediting learning** – being assured attracted people to sign up to the programme, and helped RHP build an evidence base on how learning was embedded.

6 Sage – building a culture of collaboration

Background

Sage is a market leader in cloud business management solutions. The FTSE100 company is one of the UK's largest technology brands. Founded in Newcastle in 1981, today it has over 12,000 colleagues serving more than 2 million customers in over 20 countries who rely on Sage accounting, financial management and payroll software.

Challenge of business model transition

Sage has successfully pivoted from a perpetual licence software business to become a software-as-a-service (SaaS) business. Currently, nearly 70% of total revenue is derived from software subscription. Like other software vendors that started out with traditional licensing models, the transition to the SaaS business model has meant rethinking the way to do business.

This has required a laser focus on customers' requirements, and on delivering a continuously improving service. This means thinking about the customer and what works for them – understanding their challenges and the products and services that can make their lives easier. Keeping ahead of competitors and newer entrants to the market also requires continuous service innovation for which a workplace environment that supports knowledge-sharing and collaboration is essential. Building this requires a high degree of trust and psychological safety, a diversity of voices and an environment where all employees feel that they are listened to and valued.

Creating a culture of collaboration

Sage based the development of this on three guiding principles – customer success, colleague success and innovation.

The company focused on building leadership skills among senior leaders, as well as continuing to target leadership and good management practice at line manager level, enhancing employee voice and engagement, and increasing inclusion and diversity. The aim has been to build a culture that fosters collaboration and open, honest dialogue and where colleagues feel connected to Sage's vision of being a great SaaS company for customers and colleagues alike.

All of this is underpinned and reinforced by the introduction of new values in 2020:

- **Focused pace** – prioritise, focus on one (or two) thing(s) and do it well, and move at pace.
- **Accountability** – do what we say we will do and be our best every day.
- **Take collective responsibility** – connect and solve problems together.
- **Seek diversity** – be open and curious to learn from anyone, anywhere.
- **Be transparent** – debate and explore openly and directly.
- **Show courage** – show a competitive mindset by taking calculated risks, testing, trialing, and learning to move forward.

Quite often leadership will talk about 'what' needs to happen, but not the 'why', but it is important. The Senior Leadership Programme helps leadership make it explicit what the organisation's values are and why they are important. Once senior leaders understand, it's essential that managers are also briefed. They are the key to taking our vision and values into execution, and then to build that level of understanding through all levels of the organisation so everybody understands how to work and collaborate and the commercial and personal benefits of that.

In recognition that change comes from the top, Sage developed a new leadership programme with London Business School to ensure that senior leaders are fully aligned to its vision and values. The programme involves nine days of face-to-face interaction (this element shifted to virtual in light of

the pandemic), with additional one-to-one coaching and peer support through the entire year, with specific focus on the purpose, vision, strategy and leadership behaviours. Alongside this, Sage invests in line managers to equip them with the skills and capabilities they need to create high-performing teams, and over 90% of Sage leaders now have a 'licence to lead'.

To ensure that employees are able to shape and influence decision-making, Sage invested in colleague engagement and experience, through events such as the Big Conversation, a three-day online forum involving 12,000 colleagues that helped shape a refreshed organisational culture, including setting the new Sage values. It also carries out pulse surveys twice a year to understand how employees feel about working for Sage, and to quickly shape its response to feedback. For example, feedback from the surveys helped initiate a shift in approach to performance management, with a move to quarterly feedback and development rather than annual reviews.

It has also focused on inclusion and diversity, looking at representation and inclusion, and how to support people to feel like they belong in an organisation. Sage knows that if colleagues can express their views and thoughts, it creates a culture and environment that makes people feel confident, trusted and listened to and that this in turn creates diversity of thinking and innovation. Action to support this includes the launch of an I&D council, chaired by the chief executive officer and chief people officer, as well as the creation of colleague engagement networks to support different colleague groups to thrive within Sage.

Sage believes colleagues thrive when they come together to collaborate, communicate and connect. In June, it will unveil its new global headquarters at Cobalt Business Park in the north-east of England. This will be a brand new working space for almost 1,800 north-east-based employees, as well as others from the UK and globally. It will act as an innovation and engineering hub. Its design and layout will support Sage to deliver a future of work vision that blends time in offices and time working from home or other locations for ultimate productivity and colleague satisfaction and wellbeing.

What was achieved?

Sage leadership was recently recognised by Glassdoor for having the highest rated leadership score in the UK (95%) during the COVID-19 crisis. It has achieved recognition for its colleague engagement and wellbeing initiatives in the UK, US, France and South Africa, and most recently was recognised in Comparably's Best Place to Work Awards, including Best Company Outlook and Best Global Culture.

Top tips for strategic change

- **Change comes from the top** – if you have a leadership team that recognises and exhibits the behaviours you want to see in the rest of the business – trust, collaboration, empathy – and that establishes those they don't accept, it goes some way to establishing the relationship with the rest of the organisation.
- **Be clear about the purpose of L&D** – L&D is about making sure you have the right people in the right place with the right skills to make sure the organisation performs and delivers against its purpose. To do this, L&D should align its development programmes and wider portfolio to role level and capability.
- **Understand the limits of technology** – while the pandemic has meant that more people are working remotely than ever before, it has raised questions about whether you can effectively innovate and share ideas and learnings within a remote working environment. Learning is often the product of social interaction, and technology can only do so much.

7 Co-op Group – riding the crest of a business wave

Background

The Co-op is the UK's largest consumer co-operative, with 4.34 million active members and a presence in every postal area in the country. Employing over 63,000 people, it is a major food retailer and wholesaler, operating 2,600 food stores. It is also the largest funerals provider in the UK, a major provider of regulated consumer legal services and of life planning and insurance products.

As well as having clear financial and operational objectives, the Co-op is a recognised leader for its social goals and community-led programmes. Through its *Vision of Co-operating for a Fairer World*, the Co-op exists to meet members' needs and stand up for the things it believes in.

Operating context and challenges

Over the last year, the COVID-19 pandemic placed unprecedented demand on food retailers. When the crisis first began, some rushed to the supermarkets to stockpile, while others shifted to digital, with the demand for online food deliveries reaching a record high. For the Co-op, with its concentration of small and medium-sized local shops, the biggest initial disruption was panic buying followed by increased demand as more people turned to local shops when travel restrictions came into force.

The effects of lockdown fuelled a rapid increase in the Co-op's delivery and digital offer: online orders increased fourfold, and it expanded its partnership with Deliveroo to meet increased demand for local delivery for customers. Its Funeralcare service also faced increased challenges, which included increased demand coupled with shifting government restrictions on how services could be delivered.

All of this meant that it had to rapidly grow its workforce, filling 5,000 vacancies to meet demand, in addition to filling any gaps created by employees needing to shield or isolate, all while ensuring colleagues were kept safe.

What did L&D look like and how ready was the Co-op to respond?

As an organisation founded on ideas of fairness, equality and personal responsibility, the Co-op has always been committed to education and training. From an L&D lens this means democratising learning, making it both engaging and accessible for everyone across the whole of the Co-op Group.

The Co-op had already made significant changes to how learning was delivered across its food retail and Funeralcare group, which stood it in good stead and allowed it to respond quickly to the pressures of the pandemic. These changes included:

- **Governance** – centralisation of the L&D function across the support centre, food retail and Funeralcare provided economies of scale and allowed them to have the same level of service across the organisation despite the differences in size of business area.
- **Specialisation** – this also meant that it could provide expert support across the businesses, for instance through its design studio, as well as enabling the organisation to have specialist L&D roles in place, such as content curator and researcher, evaluation manager and analyst.
- **Technology** – just prior to the pandemic, in late 2019, it had implemented a Co-op-wide learning management system, replacing over 11 separate systems and ensuring integration between HR and learning. Prior to this, it would not have been possible to deploy a piece via one-to-all colleagues or have central oversight of what learning had taken place or of tracking impact.

How did the Co-op adapt through the year?

The L&D team at the Co-op needed to work quickly to adapt its approach in light of the increased demand and the need to rapidly onboard new colleagues in retail and Funeralcare.

Working with the business, it targeted its approach to e-learning, focusing on providing colleagues with the appropriate training 'just in time'. To ensure it could rapidly onboard thousands of new colleagues, it needed a laser focus on the core fundamentals it needed to deliver through mandatory induction learning, and understanding which elements it could temporarily switch off to cope with the surge in demand. Fortunately, within the food retail business, a lot of the learning was already available virtually or via e-learning.

To support the Funeralcare business through an incredibly busy period, it had to focus on quickly onboarding new colleagues, some of whom had not previously worked in the sector. Organising a funeral requires precision, accuracy and the utmost care, and prior to the pandemic, the majority of learning for Funeralcare colleagues was delivered face-to-face and through apprenticeships. Working closely with these colleagues to derive the right training offer, in just two weeks, the L&D team designed and developed a core set of e-learning modules to ensure colleagues were appropriately trained to the required standards and could be deployed into the business.

Alongside this, it still wanted to keep its annual Festival of Learning, so it switched everything to virtual delivery, creating a range of engaging content, from action learning sets, book clubs, leader-led seminars to short playlist guides and podcasts. It extended the reach of the festival by capitalising on the opportunities of virtual delivery. This allowed a broader range of geographically dispersed colleagues to attend sessions who would otherwise have been unable to access them.

In response to the pandemic, it stood down its face-to-face delivery team. This was not just in response to social distancing requirements, but also to ensure that front-line colleagues could focus on the increased demands of their roles in supporting customers. As a result, the learning delivery team was able to switch its focus to making welfare calls to those who were shielding and self-isolating.

What was achieved?

The Co-op has always invested in evaluation and research, but this has come into its own when responding to the COVID-19 pandemic. Having a curation and researcher role within its L&D team enabled the Co-op to rapidly curate and deploy the content and tools needed to support colleagues during this difficult time. For instance, it created a toolkit to support managers in 'leading in uncertain times'.

For the Co-op's learning team, responding to the disruption caused by the pandemic enabled it to hit accelerate on its five-year plan as barriers and challenges to technology lessened. It has challenged the assumption that face-to-face is the gold-plated approach: its evaluation has demonstrated that, for some groups, the opposite is true; those who are less extroverted have really benefited from the shift to virtual. It has also demonstrated the benefits for virtual learning to the organisation through increased effectiveness, for example, reconfiguring the Funeralcare induction rapidly increased the speed to competence, as well as delivering cost savings, including reduced travel and accommodation costs.

Top tips for pivoting to virtual learning

- **Delivery** – delivering online/digital learning is very different from face-to-face, so shorten sessions to focus on key takeaways. Map out the learning, and carefully consider what the mix is between different types of content and delivery methods. Build in downtime and be clear on what can be achieved in the time available and how you will follow up.
- **Facilitation** – experienced and skilled classroom facilitators might think that their skills will naturally translate to the virtual environment, but this isn't always the case, so consider a programme of internal training and upskilling too.

- **Learner experience** – think carefully about what you will need to deliver a successful learning experience. Interactive features add to a high-quality experience and help to keep learners engaged and create impact. Consider how you are going to build in rapport and collaboration – it's more difficult to achieve but not impossible.
- **Set expectations for learners in advance** – circulate information in advance that will enhance the learning. Think about what you might share after your session too, and how that could reinforce learning. For instance, the Co-op recorded sessions and curated playlists so that colleagues could access additional learning whenever and wherever they wanted to.

8 Standard Chartered – future skills: from reskilling to redeployment and beyond

Background

Standard Chartered is a multinational banking and financial services company headquartered in London and is listed on the London and Hong Kong Stock Exchanges. With 85,000 employees and a presence in 59 markets, its network serves customers in close to 150 markets worldwide.

Organisational context and challenge

Advances in automation, blockchain technologies, cloud-based platforms, artificial intelligence and data processing are changing the ways in which Standard Chartered creates value, operates and delivers products and services. Alongside technological change, clients are demanding greater personalisation, 24/7 access and improved customer experience.

For Standard Chartered, improving competitiveness and productivity will increasingly rely on harnessing these trends. The demand for digital solutions is likely to grow more rapidly due to the experience of COVID-19 lockdowns, as is the need to develop ecosystem partnerships with other actors to deliver on these expectations. The shift in skills mix required will be significant, rapidly driving up the need for data- and technology-related roles over the next five years. Alongside growth in the demand for technical and digital roles, the sector as a whole is forecast to see increased competition for talent.

To prepare for this future, Standard Chartered's strategy is to enable the effective reskilling and upskilling of its existing workforce, rather than rely exclusively on hiring new talent, and to do so in a way that best serves its strategic priorities and business objectives. The training provided aims to be equally relevant for colleagues looking to 'upskill' in their existing roles as these evolve, as well as for those looking to 'reskill' in order to 're-role'.

Future-focused approach

To understand the scale of the challenge and to develop its approach, Standard Chartered drew on a blend of external insights and internal interviews and workshops. The first stage involved a series of internal interviews with more than 30 senior leaders to identify which skills were going to be increasingly critical in delivering their strategic and business objectives. This was then followed up with workshops, combined with data analysis to apply and extend external trends, to identify the early roles that they needed to focus reskilling efforts on.

Through this it developed a clear understanding of the top ten skills to focus on, a clear view on the 'future' roles which will be increasingly in demand (including roles which don't currently exist today) and on 'sunset' roles where fewer people will be needed over the next five years. The next step was to put in place the learning infrastructure needed to support people to reskill and redeploy across the bank, as well as to pilot an end-to-end reskilling and redeployment pathway approach for an initial five 'future' roles.

Infrastructure to support reskilling to redeployment and beyond

One of the key elements was implementing a digital learner experience platform (internally branded as 'diSCover') to make high-quality content more accessible, establishing a series of nine future skills academies to house the content, and creating a business sponsor network to help advertise and encourage learning and a growth mindset. To support engagement with diSCover, it launched with a 30-day challenge competition to drive adoption and build familiarity. It also used its Global Learning Week, which brought together senior speakers both internally and externally, to highlight and discuss the importance of learning with colleagues.

For the **reskilling and redeployment pathways pilot**, they identified five roles to go after first. Selection was based on the following criteria: the roles must support a strategic priority for the bank where a change programme is under way; there must be a need to hire/reskill people for those roles in 2021; and the scale of demand for those roles must be set to grow further across the business in the future.

Using a data-led approach, it then identified pools of potential candidates, based on the skills adjacency between their current role and the skills needed for the 'future' role. These candidate pools have been drawn almost entirely from 'sunset' roles, which are likely to be in less in demand over the next few years. For Standard Chartered, the journey with reskilling doesn't end when people are redeployed into a role; it is all about giving practical experience and skills so that they become the next thought leaders.

From reskilling to redeployment and beyond

Standard Chartered aims to develop its employees' careers, whether they ultimately end up within the bank, supporting everyone to develop their talent and access potentially multiple career paths.

Standard Chartered's approach to the development of the learning offer to support reskilling and redeployment centred on making it personalised, career focused, fun, engaging, and experiential, built up from the following elements:

- **Simulations** – providing a safe and risk-free place to build skills and get feedback.
- **Brain training** – bite-sized learning to support people to build the core skills to do a new job.
- **Partnership with talent marketplace (Gloat)** – before people go into the role, they've done the simulations, built the core skills, and worked with a mentor to experience first-hand what the role involves.
- **Focus on hiring manager behaviours** (through education and leadership messaging) and the successful candidate's induction to role and development towards being a thought leader in their new discipline.

What have some of the outcomes been?

Overall, Standard Chartered has seen a huge level of colleague engagement with its learning platform and future skills academies:

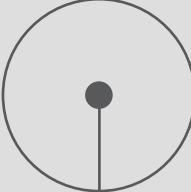
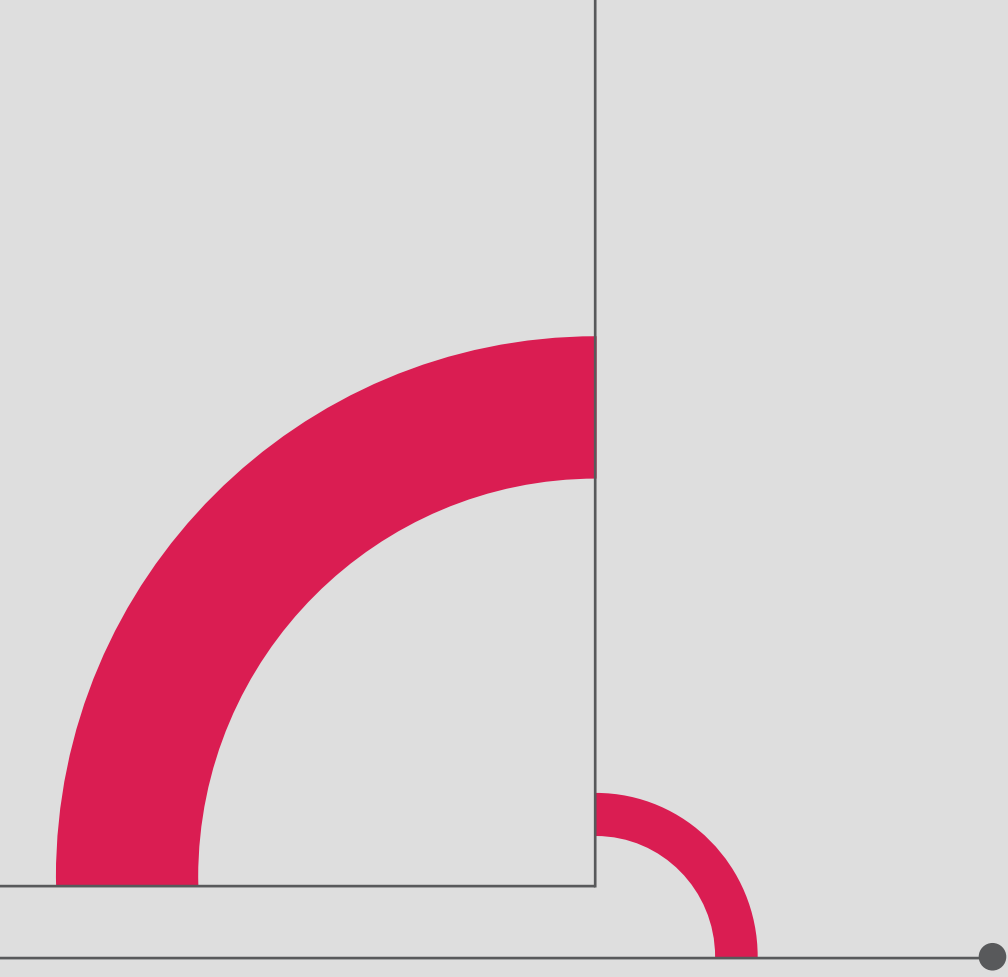
- 82% of colleagues have registered on diSCover, and every month, an average of nearly 25% of colleagues actively use diSCover. This means that one in every four people is engaging in some form of digital learning every month.
- The overall volume of personal development learning increased by 16% in 2020, despite an almost complete halt to all classroom courses for several months due to the pandemic.

- The future skills academies delivered 47% of all personal development learning in 2020, despite the majority of these only launching from May onwards.
- Quarterly learning hours via these academies more than doubled in Q4 2020, so the positive trend is accelerating.

For the pilot itself, Standard Chartered is focusing on tracking a number of measures to assess the success of its initial five role pilots. These include: the number of moves into 'future' roles from 'sunset' roles; the internal hiring rate for the five 'future' roles, the proportion of internal hires who continue to remain and succeed in these roles; and female participation in reskilling and successful selection for redeployment into new roles (data has shown these 'future' roles are currently more male-dominated).

Top tips for practitioners

- **Take an end-to-end approach** that supports colleagues on the full journey from reskilling through to redeployment and beyond.
- **Keep the colleague experience and needs at the forefront of everything you design** – they are ultimately interested in their employability, not just the acquisition of skills. Help them to connect the two.
- **Make the associated learning fun and engaging, and as experiential as possible**, leveraging technology to assist with this. The way in which they apprentice people and help them build experience needs to consider the increasing location flexibility and global nature of our workforce.
- **Remember that learning technology is merely the enabler** in all this. Use it with clear purpose in mind and don't let its use become the objective in itself.



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