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Beyond Find-and-Follow
Building a Skills-Based Organization to Drive Results

November 13, 2024

Skilling and Human Performance

We help business leaders create greater business value, achieve transformational objectives, and create a future-ready workforce by increasing levels of performance in the organization through people and their skills, abilities, and dynamics.

Diagnose	Develop	Enable	Advance
Learning Program Assessment	Design and Implementation	Digital Performance Support	Learning Operating Model
Skill Assessment	Resilient Learning Programs	Knowledge Management	Capability Development
Voice of the Learner Studies	Leadership Development Programs	Learning Ecosystem Design	Organizational Optimization
Change Climate Assessment	Career Planning Workshop	Technology Selection	Role Clarity
	Skill Model Development		

An organization that puts its people and their skills at the center of its talent management strategies to build resiliency in the face of fast-changing skill sets, widening skill gaps, and growing talent shortages.

Skills-based organizations share common characteristics and benefits

FOCUSED
Focused on the development and utilization of employee skills rather than roles as a primary driver of success.

PRIORITIZED
Prioritized employee expertise, continuous learning, and adaptability over rigid structures and siloed departments.

VALUED
Valued breadth and depth of skills, contributions, and long-term potential over education, job title, and seniority to promote equity.

EXPANDED
Expanded lateral career opportunities in addition to the traditional hierarchy.

COMPANIES THAT ADOPT A SKILLS-BASED APPROACH SEE...

ENHANCED TALENT UTILIZATION	IMPROVED AGILITY AND ADAPABILITY	FOSTERING INNOVATION AND CREATIVITY	COST SAVINGS AND EFFICIENCY

What the Shift to Being a Skills-Based Organization Looks Like

FROM...	TO...
"We need people who can fill these jobs."	"We need people who have these skills."
functional hierarchy, with jobs attached and work organized across functional silos	fluidity with projects that can be delivered by leveraging a skills portfolio across groups.
Limited learning and development technology infrastructure and limited interoperability	Integrated learning and development technology stack with interoperability into the broader tech environment.
Technology and access to "qualified" candidates are the barriers.	Practices, processes, and organizational inertia are the barriers.
Nice-to-have competencies for job clarity.	Must-have skills for organizational scalability.
Organizational competency framework updated once very few years.	Skills framework that is constantly evolving and being adapted.

CREATING A SUSTAINABLE SKILLS SOLUTION

Adequate staffing and skills underpin performance, efficiency and risk management. We approach these areas from a systemic, pragmatic lens leveraging analytics tools and insights to accelerate the design of a customized workforce plan.

Structural Design

Designing the right operating model and structure aligned with the business strategy

Staffing

Determining the labor resourcing needed to efficiently execute business strategy

Skills

Assessing the internal and external supply and demand for critical skills and upskilling the organization to perform work effectively

Powered by Data & Analytics

Leveraging data and best-in-class analytics tools to generate visualizations and uncover actionable insights to make faster, better decisions.

DATA & ANALYTICS

STRUCTURE

STAFFING

SKILLS-BASED ORGANIZATION

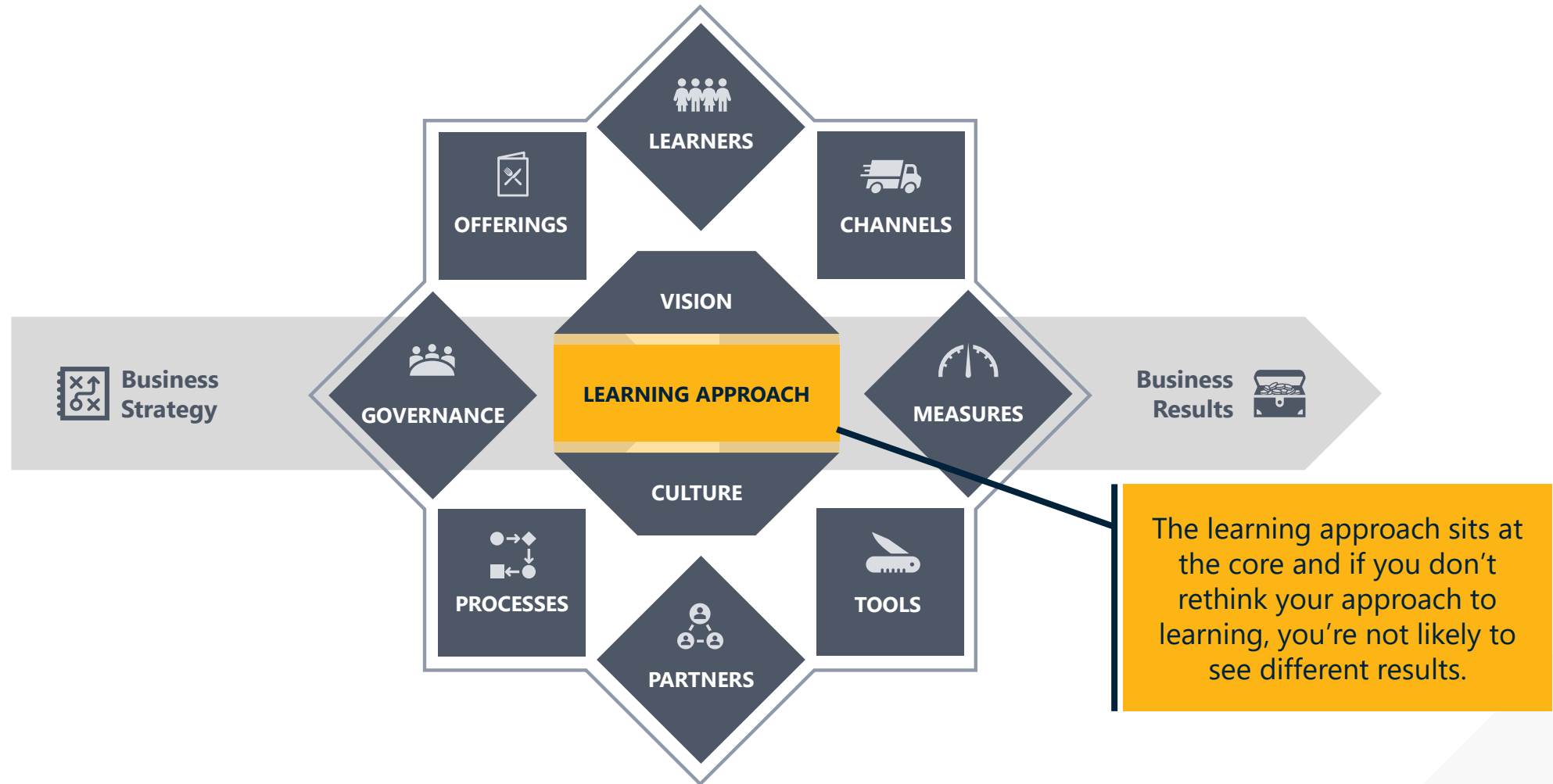**SKILLS**

Orgvue | ScreenSteps | Polinode
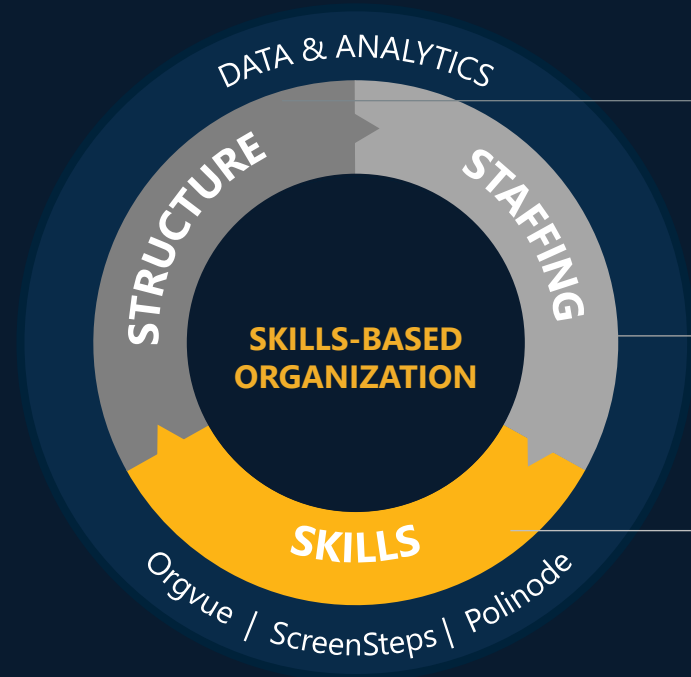
- Operating Model
- Formal / Agile Structures
- Spans & Layers
- Informal Structures / Ways of Working
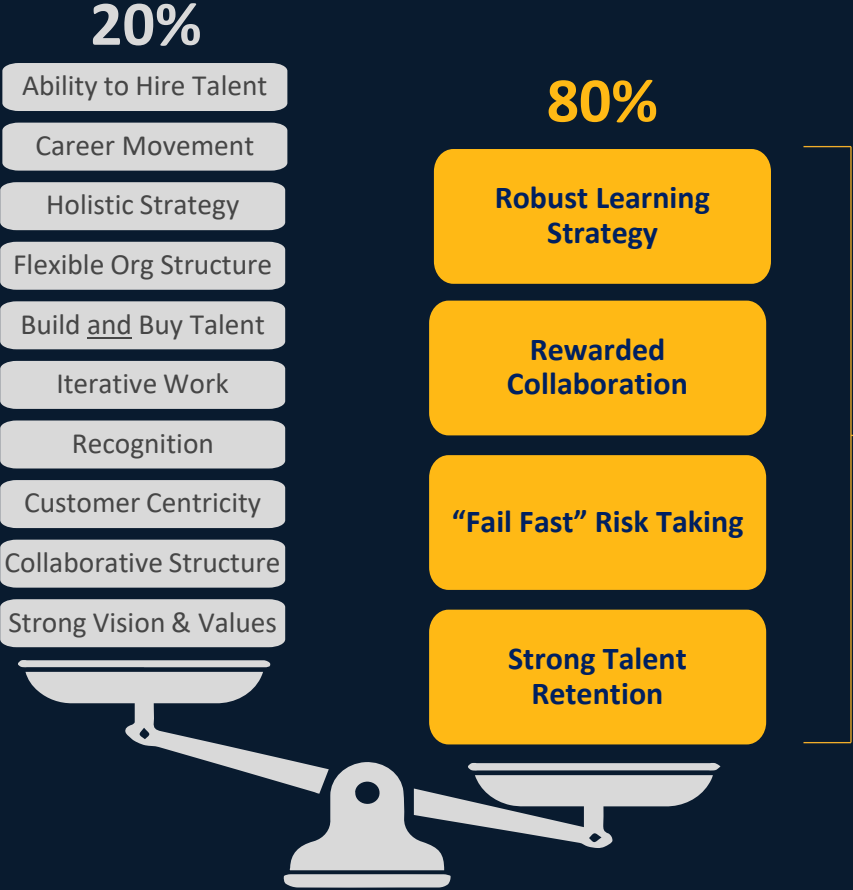- Risk & Governance Structures
- Roles

- Sizing / Resourcing
- Labor Supply & Demand
- Location
- Labor Costs

- Skill Taxonomies
- Competencies
- Technical Knowledge
- Soft Skills
- Certifications
- Skill Proficiencies

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An effective, skills-based organization requires a well-designed operating model for learning

The learning approach sits at the core and if you don't rethink your approach to learning, you're not likely to see different results.

We identified 14 practices that organizations can leverage, perhaps not all at once, but over time, to create the optimal dynamics for performance and digital agility

20%

- Ability to Hire Talent
- Career Movement
- Holistic Strategy
- Flexible Org Structure
- Build and Buy Talent
- Iterative Work
- Recognition
- Customer Centricity
- Collaborative Structure
- Strong Vision & Values

80%

- Robust Learning Strategy
- Rewarded Collaboration
- "Fail Fast" Risk Taking
- Strong Talent Retention

4 attributes had a strong statistical significance in the difference between high and low categories, which accounted for 80% of the high performance-high digital agility model outcomes.

RISK-TAKING
87% have a **"fail fast"** environment that encourages **measured risk-taking**

COLLABORATION
90% encourage and/or recognize employees for **working collaboratively**

LEARNING STRATEGY
100% have a **learning strategy** in place to drive employee development

RETENTION
80% retain the talent they need or have strategies in place to improve retention

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Organizations that have robust learning strategies do things differently

From		To	
	Training	Learning	
	Linear Thinking	Quantum Thinking	
	Developing Workers	Developing Organizations	
	Learning Outcomes	Business Outcomes	
	Training Courses	Continuous Learning	
	Certificates	Certification	
	Memorization	Real-time Support	
	Roles	Skills	
	HR-Owned	Operations Led-HR Enabled	
	Learning Management Systems	Learning Ecosystems	

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The biggest shift in our approach is away from training and towards cultivating *learning,* which naturally increases employee engagement and leads to more sustainable results

TRAINING

VS.

LEARNING

Training is often viewed as an event where trainer is the expert imparting that expertise on trainees. Responsibility rests with the trainer to shape the knowledge and behavior of the trainee.

For those being trained, is predominantly passive, and the trainer is responsible for the outcomes – that is the success or failure of the trainee.

When results aren't realized, blame is placed on the training program rather than the trainee.

Learning is a process that takes active engagement from the person learning. Instead of a trainer, they have someone facilitating and guiding them.

Learning happens when people engage in solving problems or achieving goals. This requires access to good information, a clear definition of quality, space and time to practice, and useful feedback on progress.

Ultimately, the person *learning* is responsible their own learning, growth, and performance.

The difference between training and learning is not superficial. They are very different paradigms for growth.

THE LEARNING APPROACH IN ACTION

Supporting a skills-based organization involves:

1. Adopting a skills-based perspective.

2. Focusing on badging and credentialing programs to leverage the culture of learning.

3. Cultivating actionable bodies of knowledge that support performance standards.

4. Building and maturing the operating model to support and sustain these efforts.

5. Creating varied *learning* experiences that support attainment of proficiency.

6. Identifying highly-effective learning experiences and elevating them to the national or firmwide level.

BONUS POINTS

This approach gives organizations the opportunity to cultivate increased alignment across the business, drive operational consistency and efficiency, and cultivate differentiators.

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Badges and certifications aligned to the skills, knowledge, and competency levels that drive strategy and business results fuel workforce planning, development, and management

★ BADGES

Awarded based on the ability to remember, comprehend, and apply a specific area of knowledge and skill.

Indicates minimum level of competency achieved

Requires completion of one or more learning activities, which may include tests, projects, or other passing requirements, though these are not required.

CERTIFICATIONS

Awarded based on ability to synthesize knowledge and skill across multiple areas, make judgements, and create desired business outcomes.

Indicates proficient level of competency achieved and may require renewal to stay current.

Requires evidence of proficiency including some combination of badges earned, tenure, testing, quantifiable business results, endorsements, and qualitative evaluations.

EXAMPLE

Badges + **Experience** + **Endorsements** × **Performance** = **Certification**

- Self-funded
- ISL
- ASL
- IBNR

18 months in AM role

Client Endorsement

Account Executive or and Producer verify they meet or exceed production standards

Certified Account Manager (valid for two years)

Three primary components must be in place to develop a robust, skills-based learning program

Body of Knowledge

Body of Standards

Enabling Experiences
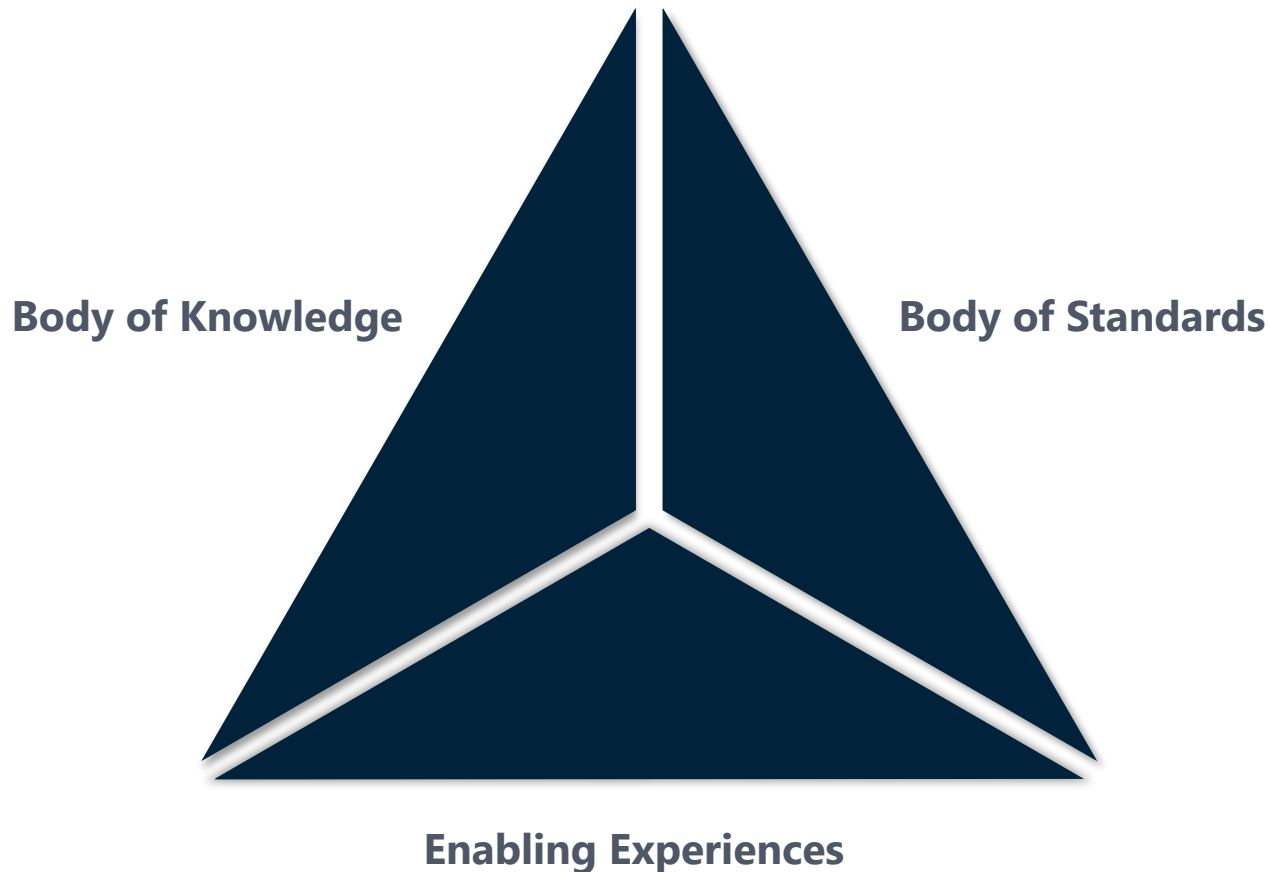
Term	Definition
Body of Standards	Define the areas where performance matters, tasks that define the role, criteria for proficiency, standards for assessment, and criteria for certification.
Body of Knowledge	Serve as the authoritative reference for meeting standards and for building learning experiences that enable performance.
Enabling Experiences	Activities that shape learning and help people to grow to meet the standards of performance. Ranging from informal to formal, they can include self-study, mentoring, microlearning, videos, structured practice, webinars, workshops, on-the job training, etc.

The order of operations begins with standards, then builds knowledge to support them, and then moves on to developing innovative on enabling experiences

Body of Knowledge

Body of Standards

Enabling Experiences

1. Establish Defensible Standard

All governance, prioritization of efforts, PMO support, and process optimization must be grounded in defensible standards. Badges and credentials should also adhere to these standards. All these components require clear scoping and disciplined job analyses that result in standards of practice.

2. Capture Knowledge for Standards

Use digital performance support to reduce the burden of knowledge. Focus knowledge collection and management first on that which is necessary to support the certification standards. Do so in a way that promotes traceability.

3. Evolve Enabling Experiences

Maintain the current approach to learning experiences where they are effective. Source third-party content that aligns with badges and credentials where possible. Develop custom learning programs that contribute to strategic goals.

Body of Standards

The body of standards has many elements that work together to create a fair and defensible program

Domain

1 Competencies

2 Performance Standards

3 Assessments

4 Credential Requirements

Set scope for

Measured by

Helps to Meet

What does it address?

Define the areas where performance matters.

Describe tasks sufficiently -- including conditions, performance, and criteria – to judge proficiency

Objectively judge cognitive, affective, and behavioral performance to discern proficient individuals

Set forth the process and evidence for demonstrating proficiency in the competencies and performance standards

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There are many moving parts that fit together systematically and enable one another to set forth a path to achievement and standards of excellence that learning experiences can enable

ROLE

Performance Expectations

Job Descriptions

Role Profiles

Day-in-the-Life

SOPs

Job Aids

Role-Based Training Checklists

TASKS → STANDARDS

KNOWLEDGE   SKILLS   ASSESSMENTS

COMPETENICES → CERTIFICATIONS

ENABLING LEARNING EXPERIENCES
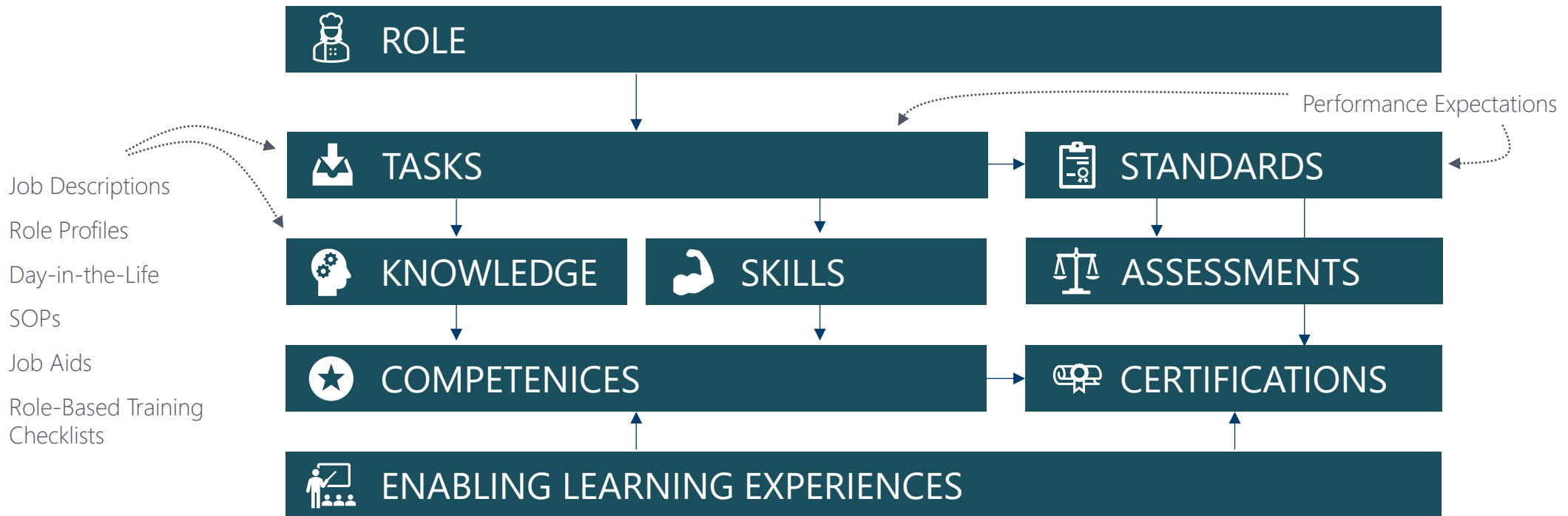
A disciplined and defensible job analysis is required by many regulations such as Title VII of the Civil Rights Act of 1964, Equal Employment Opportunity Act of 1972, and the Uniform Guidelines on Employee Selection Procedure (1978) [29 CFR Part 1607] in the US.

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Standards are a key element to a defensible program, and best practice is to ground these and any subsequent decisions in a thorough job analysis

	CUSTOMER SERVICE REPRESENTATIVES	ADJUSTERS AND EXAMINERS	ACTUARIES	UNDERWRITERS	INSURANCE AGENTS
ADVANCED OFFICE OPERATIONS					
Analyze Producer Statements and Initiate Appropriate Action				•	
Adjust Policy Limits				•	
Analyze Statistical Data				•	
Calculate Probabilities				•	
Determine Policy Contract Provisions				•	
Communicate Reserves Information and Recommendations				•	
Determine Premium Rates by Analyzing Data				•	
Determine Adequacy of Loss Reserves by Analyzing Data				•	
Implement Pricing Changes				•	
Determine Degree of Policy Risk				•	
Develop New Products				•	
Prepare for Actuarial Exams				•	
Rate Insurance Policies				•	
INVESTIGATIONS					
Order Supporting Documents		•			
Complete Investigation		•			
Prepare Investigation Report		•			
Determine Compensation Claim		•			
SALES AND MARKETING					
Identify Prospective Customer/Client					•
Pre-Qualify New Business					•
Determine Customer/Client Needs and Resources					•
Calculate Premium Quote					•
Determine Amount of Insurance					•
Present Recommendations to Prospective Customer/Client					•
Close the Sale					•
Prepare Sales Production Report					•

ADJUST POLICY LIMITS
ADVANCED OFFICE OPERATIONS

SKILL STANDARD

CONDITIONS OF PERFORMANCE
Given the following:
- Customer/Client
- Customer/client policy
- Computer/printer/manuals
- Appropriate software/manuals
- Verbal/written instructions
- Hazard key code

WORK TO BE PERFORMED
Adjust customer/client policy limits

PERFORMANCE CRITERIA
Policy will be error free
Time required to complete the skill is 30 minutes

PERFORMANCE ELEMENTS
1. Retrieve customer/client's account information
2. Examine account for frequent claims
3. Examine hazard key codes
4. Adjust policy deductible, if applicable
5. Send legal notice of adjustments to insured, if applicable
6. Print policy

PERFORMANCE ASSESSMENT CRITERIA
Observe the performance of increasing a policy deductible

PRODUCT
Customer/client policy limits are adjusted

PROCESS
The performance elements for adjusting policy limits are numbered to show an appropriate sequence for completing the skill, however, a different sequence may be used.

TASK
Summary of work to be performed

CONDITIONS
Tools, equipment, preconditions, or other resources provided at the outset

PERFORMANCE CRITERIA
Requirements for meeting the standard

PERFORMANCE ELEMENTS
Major elements or steps in overall performance

PRODUCT
Result of correctly performing the task

PROCESS
Required performance elements or requirements for sequencing

Body of Knowledge

A body of knowledge is essential to equipping people with the knowledge and procedures to meet performance standards

ADJUST POLICY LIMITS

ADVANCED OFFICE OPERATIONS

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Standards help focus knowledge management efforts on the knowledge and procedures that are most critical

Standards can allow for variation between business units while setting guardrails.

The body of knowledge would describe the procedures or provide knowledge appropriate to the context.

Alignment over time of the knowledge and procedures so they apply more broadly can help overall performance and flexibility

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In our Resilient Learning framework, an actionable body of knowledge is the foundational element to a high-performing skilling and upskilling program

Actionable Knowledge resources establish a self-service basis for just-in-time learning and support that reduces or eliminates the need for memorization, makes learning faster, and simplifies change

- Knowledge Bases
- Reference Materials
- Office Hours/Help Desk
- Quality Guidelines

Structured Practice creates opportunities to practice using actionable knowledge to solve problems and accomplish tasks in real-world scenarios that can be presented flexibly - self-study, in-person, or virtual

- Scenario-Based Learning
- Self-Study Guides
- Virtual ILT
- In-Person ILT

Refinement promotes proficiency and helps people to remain current – particularly on tasks that are performed infrequently or that are beyond the typical scenarios that are frequently encountered

- Spaced-Rep Microlearning
- Special Topics Sessions
- Coaching and OJT
- Self Evaluation

Assessment and Feedback are critical to helping people understand if they are acquiring the knowledge, preforming the behaviors, and creating the results desired, as well as to improve the learning

- Tests
- Observations
- Scorecards
- KPIs and Metrics

Note: This frequently often refers to *learning* instead of *training*. See appendix for an explanation.

When we use strategic digital tools to enable actionable knowledge, we see dramatic results

INNOVATIVE FRAMEWORK

Assessment and Feedback
Structured Practice
Refinement
Actionable Knowledge

RESILIENT LEARNING

+

DIGITAL ACCELERATOR

=

TANGIBLE RESULTS

75% less learning time with better results

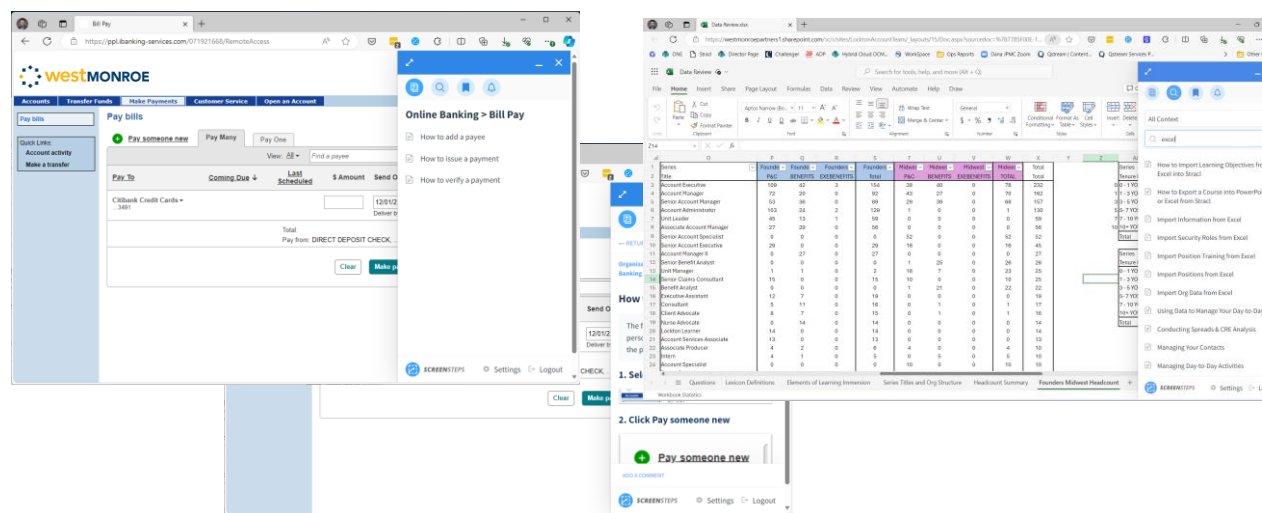**50-85%** Faster time to proficiency

70% Less effort to create and maintain materials

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A well-designed, digitally-enabled body of knowledge allows us to put learning directly in the flow of work
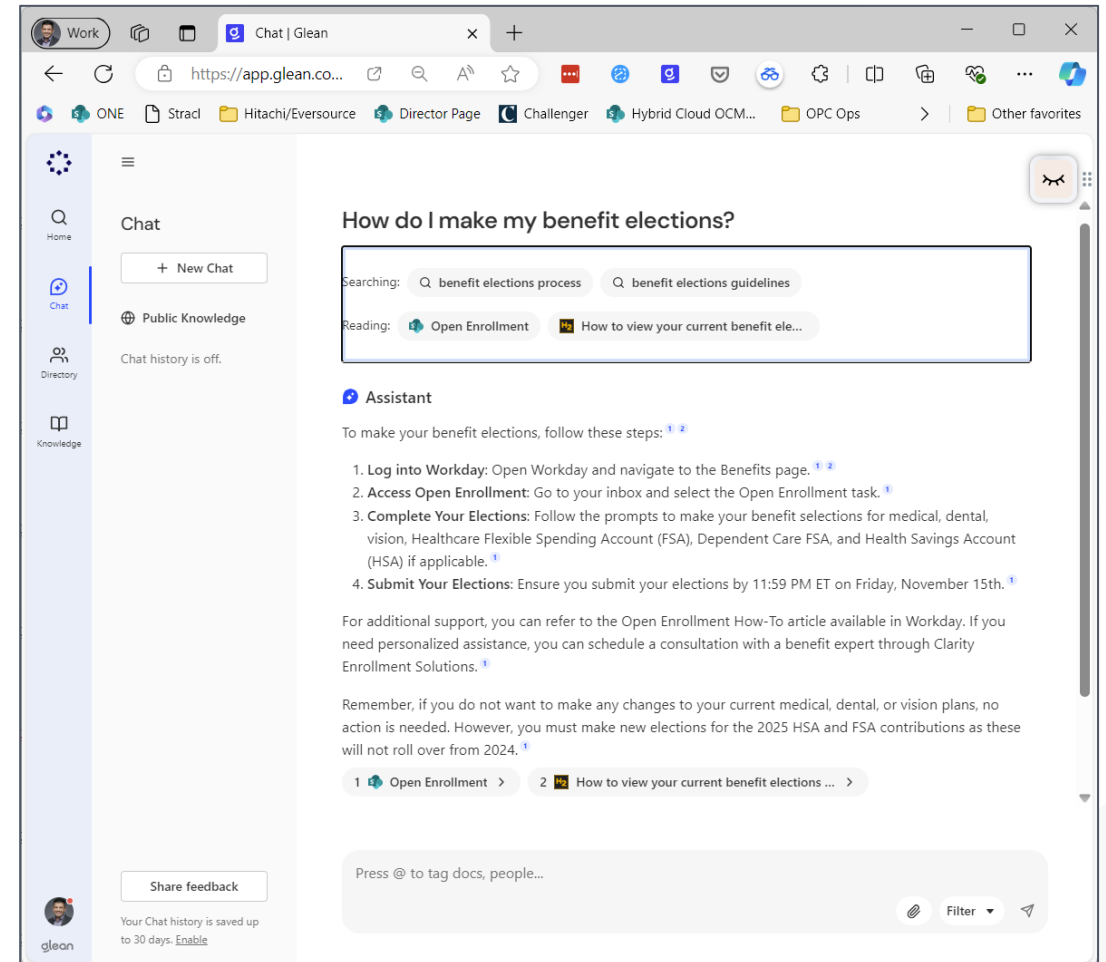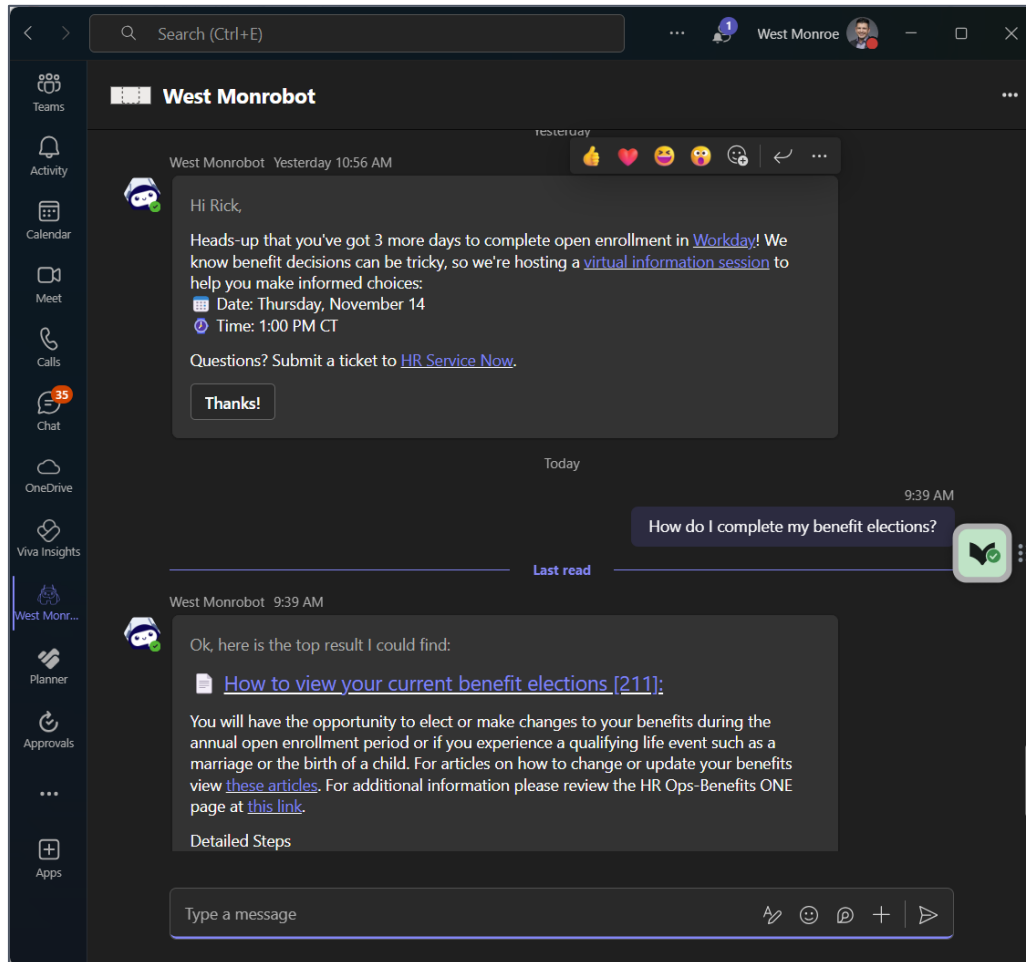
ACTIONABLE KNOWLEDGE SITE
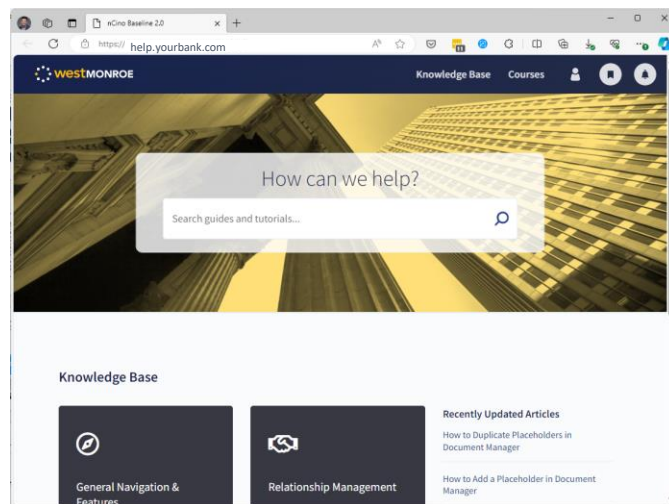
EMBEDDED IN WEB APPS FOR PERFORMANCE SUPPORT

By using the actionable knowledge base strategically, you can also make your AI solutions smarter

These efforts will, over the course of implementing this approach, help rapidly move up you to a more mature level of knowledge operations

KNOWLEDGE OPERATIONS MATURITY MODEL (ADAPTED)

Performance and Productivity

Tribal

Documented

Guided

Practiced

Accelerated

Typical
Current State

Learning takes place through informal channels, shadowing, peer support, supervisor mentoring. Documentation typically does not exist, is of lesser quality, or is exceedingly difficult to find.

Documentation is created, but may lack coverage, usage, or useability. Documentation is typically not designed to be actionable or with the end-user in mind.

Digital guides are designed and kept updated to support employees' tasks, problem solving, and decision-making activities. Employees use guides when working.

Traditional training practices are abandoned in favor of structured practice and minimal to zero-memorization approaches centered around the guides themselves.

Guides are integral to the organizations' operations and continuous improvement efforts. Feedback loops integrate questions and in-the-field innovations.

Enabling Experiences

Resilient Learning is our unique approach toward learning and performance support that makes it easier to help people learn the skills they need to drive results

Limited Memorization

Memorization takes time and effort, is unreliable, and leads to performance deficits when things inevitably change over time

Performance Focus

People are busy juggling many priorities and want good information to get results in the moment of need

Maintainable

Organizations should always be evolving and getting smarter, but the work to maintain learning programs gets them left behind

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Learners are proficient more rapidly because Resilient Learning actionable knowledge reduces memorization, while structured practice and reinforcement drive engagement and performance

1 SELF STUDY

2 STRUCTURED PRACTICE

KNOWLEDGE ARTICLES

3 REINFORCEMENT

4 SUSTAINMENT
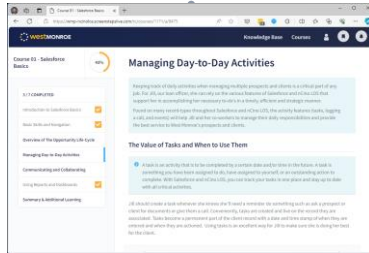
Learner begins by completing brief, **self-paced learning modules** to orient to the process, tool, **actionable knowledge**, and terminology.
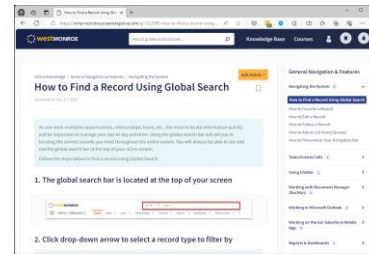
Learner attends in-person **structured practice** workshop and experiences solving real-world scenarios using **actionable knowledge** articles

In the course of day-to-day work, learner uses actionable knowledge to perform tasks and is presented with **reinforcement** (e.g. gamification) challenges that shape the desired behaviors. Regional nuances to be considered.
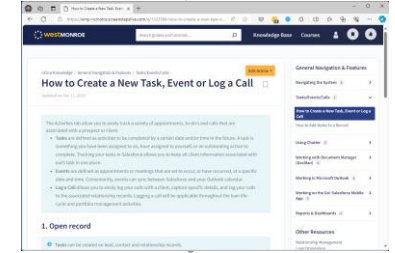
The learning journey continues in the flow of work as learner uses **actionable knowledge** to support and guide actions for consistent performance, even when systems or processes change and evolve.

Reinforcement tools help create strategic reasons for people to exercise their find-and-follow muscles and strengthen foundational knowledge

1 Micro Challenge

2 Answer Scenario

3 Immediate Feedback

4 Micro Explanation

5 Friendly Competition
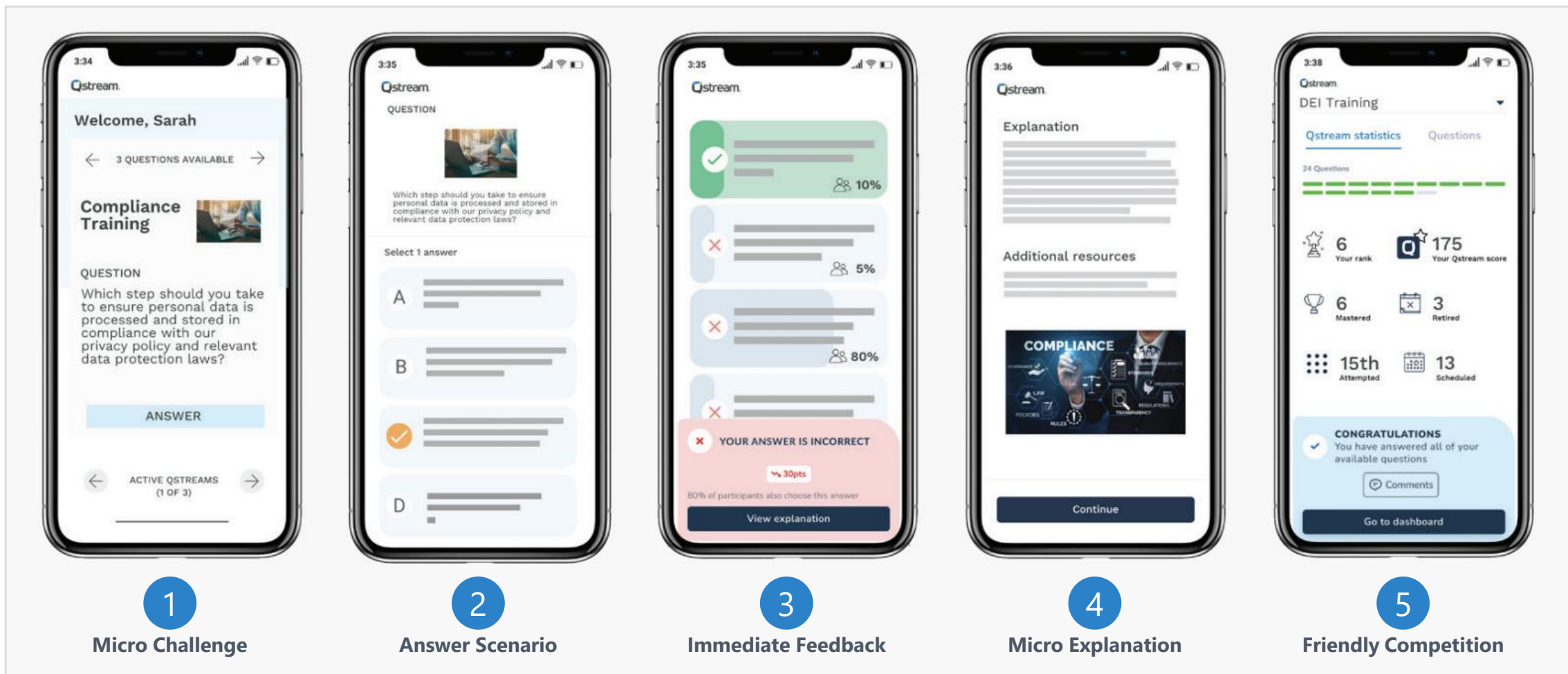
Our approach makes knowledge operations more efficient and lays the groundwork for intelligent support

The Art of the Possible

Product Team
Captures, curates, and manages knowledge for better customer care and internal operations

Marketing & Communications
Contribute and collaborate on knowledge articles to ensure accuracy and brand messaging

Legal
Contributes to messaging strategy and provides guidance directly in tool for managing exposure

Business Unit
Documents activities to avoid "brain drain" and enable continuous improvement

Servicing Representatives
Use knowledge base to create consistent, on-brand interactions that address issues accurately and with less handling

AI Chatbots
Use the information in guides to intelligently respond to customer inquiries and guide them to self-service answers

End Users (Customers)
Access self-service information directly in customer site or through hyperlinks in text messages sent by the IVR to deflect calls

Business Operations
Use the processes and procedures to drive consistent execution, increase collaboration, and drive operational efficiency

Legal, Marketing, and Comms
Gain access to a broader base of knowledge along with revision history of articles for reference in future work

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With these elements in place, we can create ideal conditions for people to learn, grow, pursue mastery and serve clients well

For the learner, these three component provide answers to critical questions:

1. Why should I bother?
2. What do I need to learn or master?
3. How do I do what is expected?
4. What support do I have to get there?

Body of Knowledge

Body of Standards

Enabling Experiences