THE 18TH ANNUAL THOUGHT LEADERS RETREAT

Using Workforce Analytics for Competitive Advantage

September 26-27, 2016  I  Sheraton Seattle  I  Seattle, Washington, USA

Sponsored by:

jacksonlewis.

GP STRATEGIES  HireVue  LinkedIn

RiseSmart  Ryan
Major funding for this event was also provided by the Society for Human Resource Management.

At the SHRM Foundation, we are a catalyst for thought leadership. We help predict where the workforce is headed because we've been studying its evolution for 50 years. Our mission is to offer unmatched human capital knowledge for the benefit of professional organization leaders with a total focus on studying and reporting the management practices that work. Supporting the Foundation is a chance to contribute to an ongoing study about the direction of human resources in society. The Foundation is governed by a volunteer board of directors, comprising distinguished HR academic and practice leaders. Contributions to the SHRM Foundation are tax-deductible. The SHRM Foundation is a 501(c)(3) nonprofit affiliate of the Society for Human Resource Management (SHRM). For more information, contact the SHRM Foundation at (703) 535-6020. Online at shrmfoundation.org.
Dear Colleague:

Welcome to our 18th annual SHRM Foundation Thought Leaders Retreat, *Using Workforce Analytics for Competitive Advantage*.

The use of workforce analytics is transforming human resource strategy. A 2015 Economist Intelligence Unit survey found that 82 percent of organizations plan to either begin or increase their use of “big data” in HR over the next three years. CEOs are recognizing the importance of talent-related analytics in managing recruitment, retention, turnover and more.

Yet many senior HR executives are struggling to make sense of all the hype and derive business insights from big data. During the next two days, we will explore how analytics are being used to better inform people strategy and how your organization can make better data-driven decisions.

From its modest beginning in 1999 as a small gathering of Foundation Board members and experts, this retreat has grown to become a premier event where senior business leaders interact with academics and other thought leaders to share candid discussion and insights about the critical issues of the day. This year, the SHRM Foundation is celebrating its 50th anniversary, and it is exciting to see how far we’ve come!

Our 2016 theme is part of the SHRM Foundation’s strategic Thought Leadership Initiative. In 2013, the Foundation partnered with the Economist Intelligence Unit (EIU) to identify and analyze critical trends likely to affect the workplace in the next 5-10 years. After conducting a rigorous process of surveys, peer panels, research and analysis, we’ve identified three critical themes and focused our program of work on these topics:

2. *Engaging and Integrating a Global Workforce (2015)*
3. *Use of Workforce Analytics for Competitive Advantage (2016)*

This retreat will explore Theme 3. Our goal is to inform “what’s next,” drive evidence-based research and identify solutions for the resulting HR challenges. The SHRM Foundation seeks to empower HR professionals to transform their workplaces. Through this important initiative, we are educating leaders to make that happen.

To learn more, please visit our digital hub at shrmfoundation.org/shapingthefuture.

We encourage you to change tables and meet new people throughout the retreat. Ask questions, challenge assumptions and participate actively in the sessions. This is your opportunity to learn from your peers and gain a new perspective on this topic.

Thank you for joining us today. Enjoy the program!

Tom Darrow, SHRM-SCP  
*Chair, SHRM Foundation Board*

Sara Rynes-Weller, Ph.D.  
*Co-chair, Thought Leadership Committee*

Tina Sung, CAE  
*Co-chair, Thought Leadership Committee*
Day One
Monday

10:30-10:40 a.m. Welcome & Opening Remarks
Ian Ziskin, President, Exec Exel Group LLC
Hank Jackson, President and CEO, Society for Human Resource Management

10:40-11:40 a.m. Better Talent Management Through Workforce Analytics
Mark Huselid, Distinguished Professor of Workforce Analytics and Director of the Center for Workforce Analytics, Northeastern University

11:40 a.m.-12:30 Lunch

12:30-12:45 p.m. SHRM Foundation Update
Tom Darrow, Chair, SHRM Foundation Board; Founder and Principal, Talent Connections, LLC and Career Spa, LLC
Mark Schmit, Executive Director, SHRM Foundation

12:45-2:15 p.m. Generating Meaningful Insights from Analytics: Lessons Learned
Mark Blankenship, EVP, Chief People, Culture & Corporate Strategy Officer, Jack in the Box
Doug Grant, Director, Total Rewards and Organizational Analytics, Johnson & Johnson
Dawn Klinghoffer, General Manager, HR Business Insights, Microsoft
Moderator: Bill Schiemann, CEO, Metrus Group

2:15-2:30 p.m. Break

2:30-3:45 p.m. HR Analytics: Panacea or Placebo?
Alec Levenson, Author, Strategic Analytics and Senior Research Scientist, Center for Effective Organizations, Marshall School of Business, University of Southern California
Alexis Fink, Director, Talent Intelligence Analytics, Intel Corporation

3:45-4:00 p.m. Break

4:00-5:00 p.m. Peer Discussion: Your Analytics Challenges & Solutions

5:15-6:30 p.m. Reception in Cirrus Ballroom
Dinner on your own

Visit shrmfoundation.org/shapingthefuture to find additional analytics resources and to learn more about the SHRM Foundation Thought Leadership Initiative.
Day Two
09.27.2016
Tuesday

THOUGHT LEADERSHIP INITIATIVE SUPPORTERS

Connect on Twitter
Use #TLAnalytics16 to tweet about this event. We encourage you to follow the SHRM Foundation (@shrmfoundation) for updates on new educational resources, thought leadership and HR research.

7:00-8:00 a.m.  Breakfast
7:45-8:00 a.m.  Welcome and Announcements
8:00-9:00 a.m.  Navigating Political and Ethical Issues of Using Big Data in HR
Greta Roberts, CEO and Co-founder, Talent Analytics
9:00–9:15 a.m  Break
9:15-10:30 a.m  Force of the Future: A New Perspective on Workforce Planning
Jerry Diaz, Chief, Force Management and Enterprise Readiness Analysis Division, U.S. Air Force
10:30-10:45 a.m.  Break
10:45-11:45 a.m.  Artificial Intelligence and Machine Learning Meet HR
Mark Rivera, Product Manager, Data Science, Google
11:45-11:50 a.m.  Closing Remarks

Thank you to the following individuals and companies for their support of the SHRM Foundation Thought Leadership Initiative:

- Richard Klimoski, Ph.D.
- Karen B. Paul, Ph.D.
- Coretha M. Rushing, SHRM-SCP
- Sara Rynes-Weller, Ph.D.
- Mark J. Schmit, Ph.D., SHRM-SCP
- James R. Schultz
- Talent Connections, LLC and Career Spa, LLC
- Jose Tomas, SHRM-SCP

To find out how you or your organization can support this important work, please contact Foundation development director, Ashlee Smith, at ashlee.smith@shrm.org.
Mark H. Blankenship, Ph.D., is executive vice president and chief people, culture & corporate strategy officer for Jack in the Box Inc. He is responsible for the company’s human resources, compensation & benefits, Jack’s University, training & development, consumer intelligence & analytics, internal brand communications and corporate strategy process. Blankenship also serves on the board of The Jack in the Box Foundation, a nonprofit organization that focuses the company’s charitable donations to make a difference in communities where employees, franchisees and guests of Jack in the Box® restaurants work and live. Blankenship joined Jack in the Box Inc. in 1997 as division vice president of training, and later was named division vice president of training and development and field human resources. In 2005, he was promoted to vice president of human resources, and in 2010 he became senior vice president and chief administrative officer. He was promoted to his current position in November 2013. Prior to joining Jack in the Box, Blankenship was vice president of human resources for Mitchell International, a San Diego-based company that provides information products, software and e-business solutions to the insurance industry. Blankenship has a doctorate and a master’s degree in industrial organizational psychology from the California School of Professional Psychology in San Diego and a bachelor’s degree in psychology from California State University, Sacramento.

Gerald Diaz, Ph.D., is chief of the force management and enterprise readiness analysis division for the U.S. Air Force. He leads a team of 18 analysts performing Air Force (AF) Total Force human capital analyses. He develops strategic studies to build, shape, manage, develop, retain and support a diverse AF across all aspects of AF personnel life cycle analyses—recruiting, accessing, training and education, promoting, retaining, and developing. Jerry’s team conducts analysis of 506K Total Force Airmen engaged worldwide in contingency, peacekeeping and humanitarian operations. He has led strategic comprehensive personnel studies for the AF Total Force on the Military Retirement and Compensation Reform, linking military exit/retention surveys to personnel policies and programs, diversity and inclusion evaluations, female retention/pregnancy deferment/operations impact, and developing an Air Force Human Capital Analytic Strategy. Dr. Diaz is a 27-year veteran of the Air Force and has been the head of the department of mathematical sciences at the U.S. Air Force Academy, chief analyst for Air Force Studies and Analyses, a Fellow at the Homeland Security Institute, an editor for the Military Operations Research Society (MORS) Journal and a member of the MORS Board of Directors.

Alexis A. Fink, Ph.D., is currently director of talent intelligence analytics at Intel. Her organization provides original organizational effectiveness research, HR analytics, talent marketplace analytics, HR systems and tools, and consulting on talent solutions. Prior to Intel, Alexis spent seven years at Microsoft, where her roles included director of talent management infrastructure. Her career has been characterized by an integrative approach to HR,
including developing and implementing competency systems and integrated talent management systems. Her background also includes work in large-scale organizational transformation. Alexis earned her Ph.D. in industrial/organizational psychology at Old Dominion University. In addition to practicing and leading in organizations, she continues to teach, is a frequent SIOP contributor, and an occasional author and journal editor.

**Doug Grant** is the director of total rewards and organizational analytics for Johnson & Johnson (JNJ). Doug leads JNJ’s global organizational analytics team, which is responsible for enabling evidence-based talent decisions to improve workforce and business outcomes. His group leads workforce research in a variety of areas, including attrition, retention, performance, compensation, talent development, engagement, innovation and organizational design. In this role, he oversees Johnson & Johnson’s employee survey strategy and is also responsible for managing a number of JNJ’s global compensation systems and processes. He has represented Johnson & Johnson in the Conference Board’s Human Capital Analytics Council, the Mayflower Group and is a member of the Board of Advisors of the Center for Workforce Analytics at Northeastern University. Prior to his current role, he provided strategic oversight of total rewards practices and programs for Johnson & Johnson North America. Doug has been with JNJ since 2005 and previously worked for GE in its commercial finance division. With GE, Doug worked in a variety of areas, including total rewards, market research and Six Sigma quality. Doug graduated from Western Michigan University with a bachelor’s degree in business and earned a master’s degree in human resource management from Purdue University.

**Mark Huselid, Ph.D.,** is the Distinguished Professor of Workforce Analytics and director of the Center for Workforce Analytics at the D’Amore-McKim School of Business at Northeastern University. His research, teaching and consulting activities are focused on the development of balanced measurement systems to reflect the contribution of the workforce, workforce management systems and the HR management function to strategy execution and business success. Mark was the editor of the *Human Resource Management Journal* from 2000 to 2004 and is a current or former member of many academic and professional boards. The recipient of numerous awards for his research, he is among the most frequently cited scholars in the organizational sciences. He is also a frequent speaker to professional and academic audiences, having delivered over 600 presentations throughout the U.S., Europe, Africa and Asia. In addition, Mark has consulted on the topics of HR measurement and HR strategy with many companies around the world. Mark’s first two books, *The HR Scorecard: Linking People, Strategy & Performance* (with Brian Becker and Dave Ulrich, published in 2001 by the Harvard Business Press (HBP)), and *The Workforce Scorecard: Managing Human Capital to Execute Strategy* (with Brian Becker and Dick Beatty, published by the HBP in 2005), have been translated into 10 languages and are international bestsellers. His latest book, *The Differentiated Workforce: Transforming Talent Into Strategic Impact* (with Brian Becker and Dick Beatty), was published by the HBP in March 2009. Huselid’s new book, *Disrupting Workforce Competition: Executing Strategy through Strategic Work, Workforce Differentiation, and Workforce Analytics,* is currently in development.

The 2016 Thought Leaders Retreat has been approved for 7.5 Professional Development Credits (PDCs) for SHRM Certification.
Dawn Klinghoffer, a mathematician by background, joined Microsoft over 18 years ago, initially contributing to and subsequently now leading a team of 30 people. Her team has skills in statistics, psychology, finance and a whole host of other capabilities all underpinned by analytics, which Microsoft brings to bear in its HR Business Insight. “Microsoft is very data-driven,” Klinghoffer says, “so pretty much everyone wants to understand every type of aspect of our data, and that’s what our team specializes in.” Dawn’s responsibilities at Microsoft include advanced people analytics and research for Microsoft’s business units globally, analytics support for HR programs, global diversity & inclusion, global HR operations, reporting tools and technology for HR, and HR data privacy. Prior to Microsoft, Dawn was an actuary at leading insurance companies.

Alec Levenson, Ph.D., is an economist and senior research scientist at the Center for Effective Organizations, Marshall School of Business, University of Southern California. He is the author of the book Strategic Analytics. His action research and consulting work with companies optimize job and organization performance and HR systems through the application of organization design, job design, human capital analytics and strategic talent management. He has trained HR professionals from a broad range of Fortune 500 and Global 500 companies in the application of human capital analytics. Alec’s research has been featured in numerous academic and business publications, and in the New York Times, Wall Street Journal, The Economist, CNN, Associated Press, U.S. News and World Report, National Public Radio, Los Angeles Times, USA Today, Marketplace, Fox News, and many other news outlets. Alec has received research grants from the Sloan Foundation, Russell Sage Foundation, Rockefeller Foundation, U.S. National Science Foundation, China National Science Foundation and National Institute for Literacy. He is on the editorial boards of Human Resource Management and Small Business Economics. He received his Ph.D. and M.A. in economics from Princeton University, specializing in labor economics and development economics, and his B.A. in economics and Chinese language (double major) from University of Wisconsin-Madison.

Mark Rivera, Ph.D., works as a product manager on the People Analytics Team at Google, where he uses research methodologies from sociology, social psychology and machine learning to develop products that users find engaging and personalized. He earned his Ph.D. from the Kellogg School of Management and holds a graduate certificate in data mining and machine learning from Stanford University. Mark has taught classes on management, social networks and negotiations at the Kellogg School of Management and has consulted on the use of social network data at Zynga, Google, IDEO, Stanford School, Northwestern University and the Stanford Graduate School of Business.

Greta Roberts is the CEO and co-founder of Talent Analytics. She is an influential pioneer in the field of predictive workforce analytics where she creates solutions and dialogue between the predictive analytics and workforce communities. In recognition of her commitment and leadership, Greta was elected and continues to be Chair of Predictive Analytics World for Workforce, an innovative, annual predictive analytics event dedicated

“Never make a decision based on only benchmark data. Benchmark data at best can inform the beginning of your inquiry, not the end.”

– Alec Levenson, “I Solemnly Swear ... an HR Data and Analytics Manifesto”
“Is it people analytics, workforce analytics, talent analytics or something else? It doesn’t matter what you call it—the point is that predictive workforce projects need to address and predict business outcomes not HR outcomes.”


William A. Schiemann, Ph.D., is principal and CEO of Metrus Group, an organizational research and advisory firm specializing in strategic performance measurement, organizational alignment and talent optimization. Dr. Schiemann and his firm are known for their pioneering work in the creation of the People Equity (ACE) talent optimization framework, strategic performance metrics and scorecards, the strategy mapping process, valuation of internal shared service functions, and strategic employee surveys that drive high performance. He has consulted extensively with many major corporations. Bill is a thought leader in the human resource field, authoring scores of articles and multiple books, including The Rise of HR (HRCI 2015), Hidden Drivers of Success: Leveraging Employee Insights for Strategic Advantage (SHRM 2013), The ACE Advantage: How Smart Companies Unleash Talent for Optimal Performance (SHRM 2012), Reinventing Talent Management: How to Maximize Performance in the New Marketplace (Wiley & SHRM 2009) and Bullseye! Hitting Your Strategic Targets Through High-Impact Measurement (Free Press 1999). In addition to publication, Dr. Schiemann is a frequent global speaker for many public and private forums, including the American Society for Quality, Australia Human Resource Institute, Hong Kong Institute of HR Management, Human Resource Excellence Center (China), Human Resource Planning Society and the Society for Human Resource Management. Dr. Schiemann received a Ph.D. in organizational psychology from the University of Illinois, an MBA from the Stuart School at Illinois Institute of Technology and a B.S. in psychology from Illinois Institute of Technology.

Thank You

The SHRM Foundation recognizes all of the Thought Leaders Retreat presenters, planning committee members and other supporters for generously donating their time and expertise to make this event a success.
The use of workforce analytics is transforming human resource strategy.

Learn more about this emerging trend in our new SHRM Foundation/ EIU report Use of Workforce Analytics for Competitive Advantage.

shrmfoundation.org/shapingthefuture
Join the Celebration
For 50 years the SHRM Foundation has supported HR professionals like you. We invite you to join our anniversary celebration!

Program Sponsors
We appreciate the support of our 2016 Thought Leaders Retreat sponsors:

Jackson Lewis P.C. and Lynn C. Outwater proudly support
THE SHRM FOUNDATION THOUGHT LEADERS RETREAT

With 800 attorneys practicing in major locations throughout the U.S. and Puerto Rico, Jackson Lewis provides the resources to address every aspect of the employer/employee relationship.