
CHREATE Executive Summary

Phase 3: June 2015 to June 2016

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How You Can Use This Webpage

CHREATE provides ideas, frameworks and tools designed to help HR leaders and their constituents disruptively accelerate the future of HR and organizations. This executive summary is your guide to the history of CHREATE, and more specifically to the ideas and practical tools developed by CHREATE's team of over 100 CHROs and HR thought leaders over the last three years.

The summary will guide you through the CHREATE results as they were presented at the Phase Three Project Summit, held at Twitter headquarters on May 17, 2016. We invite you to use this webpage to support your own efforts to understand the future of HR, and to engage your constituents and organization leaders in the important work of disruptively accelerating the evolution of the HR profession.

How the CHREATE Project Began

CHREATE, the Global Consortium to Reimagine HR, Employment Alternatives, Talent and the Enterprise, began in January 2014. Originally named the *Future of HR Project*, it was driven by a community of HR leaders committed to disruptively accelerating the evolution of HR. The CHREATE initiative is unique not only because of the elite group of CHRO's and HR thought leaders who have helped build it, but also because it is open source, voluntary, inclusive, messy and agile.

For more information about the CHREATE project's [values and beliefs](#), and the [background](#) of the initiative leading up to Phase Three, please visit <http://chreate.net/about/>.

Phase One: Defining the Challenge

In 2013 twenty CHROs volunteered to work together to describe how the HR profession must accelerate to meet rapidly-approaching future challenges. Under the guidance of CHREATE's Advisory Group, they were interviewed about current and future expectations for HR, the profession's ability and challenges in meeting these expectations, and the pivotal gaps that needed to be addressed. Phase One culminated in a gathering of CHROs in June 2014, where the group learned the results of the interviews and collectively identified four pivotal arenas where the profession's progress must accelerate to

meet future challenges:

1. **Align HR with Value Creation for Organizations that Win**

Articulate an HR charter/ contribution model that describes precisely how great HR contributes to organizations' ability to successfully compete in the future.

2. **Shape Expectations of HRs Key Constituents**

Create a "pull" for the future of HR by defining today's expectations among key constituents (such as Boards, investors, C-suite teams, policymakers and employees), and more importantly define how those expectations must be enhanced and improved.

3. **Rewire The Work and Tools of HR**

Define the vital improvements in processes, practices, systems, and operating models that are necessary to support and drive the key deliverables and outcomes for the future of HR.

4. **Enhance the HR Talent Pipeline**

Insure the availability of the necessary talent to lead, build and grow HR in the future, by developing necessary new professional requirements, talent sources, and career paths, based on the best research on the needs and gaps in the HR profession.

[Click here](#) to read a detailed summary of the findings from the Phase One Summit, June 2014.

[Click here](#) to see a list of the Phase One participants.

Phase One was funded by the [Society for Human Resource Management \(SHRM\)](#) and the [National Academy of Human Resources \(NAHR\)](#). The summit was hosted at [Juniper Networks](#).

Phase Two: Describing the Future Vision

Phase Two ran from June 2014 to May 2015, with four volunteer teams of top HR leaders– one team taking on each pivotal challenge identified in Phase One. The teams recruited thought leaders, futurists and executives inside and outside of HR, and conducted interviews and focus groups with that group. The teams identified these [Five Forces of Change](#):

1. **Exponential pattern of technological change**

Technological breakthroughs will force organizations to adapt and reinvent themselves more quickly. Meanwhile the workforce faces the risk of job loss and skill obsolescence, requiring that they adapt and reinvent themselves.

2. **Social and organizational reconfiguration**

The workforce's increased autonomy and decision-making authority will make the workplace more power-balanced and less authoritative. The workplace will be structured more through social networks and less through hierarchy. Work relationships will be more freelance, gig, and project-based and less exclusively employment-based. Organizations will tap more diverse avenues for sourcing and engaging talent that extend beyond traditional employment.

3. **A truly connected world**

Information will be more abundant, richer and more available to everyone. Work will be accomplished from anywhere, creating a truly global talent ecosystem. Seamless global and real-time communication, will lead to faster product development. Go-to-market strategies will be more diverse, and have shorter product/strategy durations. Organizational reputation will become a pivotal currency in customer and work markets.

4. **All inclusive, more diverse talent market**

Multiple generations will increasingly participate as workers, today's minority segments will become majorities, older individuals will work longer, and work will be seamlessly distributed around the globe through 24/7 operations. Organizations that win will develop new employment contracts and hone new leadership styles and

worker engagement approaches to address the varied cultural preferences in policies, practices, work design, rewards and benefits.

5. **Human and machine collaboration**

Technological breakthroughs will produce exponential disruptions in markets and business. The rapid adoption of robots, autonomous vehicles, commoditized sensors, artificial intelligence, and global collaboration will renew the thinking about work.

Other Phase Two teams described how Workforce Planning, Attraction, Alignment and Engagement must evolve, and how Operational Excellence will be redefined. To support this evolution, teams identified new roles within organizations and the HR profession. Finally, team interviews with CEOs and Board members revealed HR to be valued and admired, but also the need to evolve quickly to meet emerging challenges that fall “within the white spaces” of today’s typical HR function and workforce strategy.

More information on Phase Two can be found in the [Phase Two Executive Summary](#).

[Click here](#) to see a list of the Phase Two teams and participants.

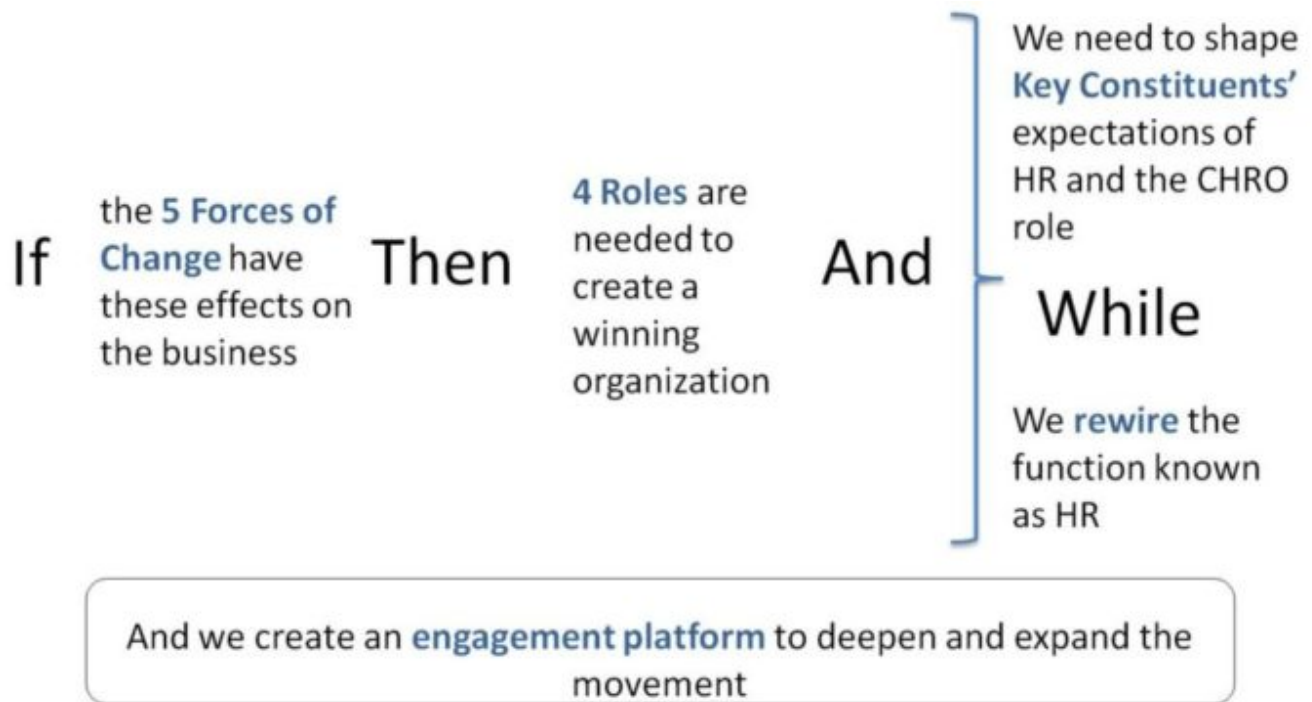
Phase Two received financial and in-kind support from [SHRM](#), [NAHR](#), [PricewaterhouseCoopers \(PwC\)](#), [Root Inc](#), and [Electronic Arts](#).

Phase Three: Tools to Bring the Concepts to Life

Phase Three ran from June 2015 to June 2016, and was about enabling action: Take the frameworks and ideas from the first two phases, and build tools, examples and dissemination techniques that would help leaders bring them to life in their organizations and among key influencers. Once again, leaders in the HR community stepped forward, forming five volunteer project teams, one for each change arena from the first two phases:

- [Five Forces of Change](#)
- [Four Roles Talent Pipeline](#)
- [Shape Key Constituents Expectations](#)
- [Rewire the Work and Tools of the HR Function](#)
- [Creating an Engagement Platform to Start a Movement](#)

The work of the five teams was logically integrated as shown below:



The sections that follow describe the tools, how to use them, and provide links to access and apply them. HR and operating leaders can use these prototype tools to drive the profession forward, through their personal leadership and careers and in the organizations they support.

[Click here](#) to view articles and blogs written by CHREATE members, that further describe the tools, how the frameworks behind the tools can change the future of HR and work, and the implications of these future developments for workers, leaders and organizations.

[Click here](#) to see a list of the Phase Three teams and participants.

Financial and in-kind support for Phase Three came from [HR People + Strategy \(HRPS\)](#), [Innovation Resource Center for Human Resources \(IRC4HR\)](#), [NAHR](#), [Allegis Partners](#), [Executive Networks](#), [Cambia Health Solutions](#), [Flex](#), [RGP](#), [Root Inc](#), and [Twitter](#).

Team 1: "Five Forces of Change" Toolkit

Leaders must visualize the future of work, assess their position and readiness, and apply solutions that evolve the talent and enterprise to meet the challenges. The Five Forces team developed tools that can help you guide leaders through this process. The team envisions that HR leaders will use the Five Forces materials as a catalyst to prepare for the future and to unlock the value of these future opportunities in their organization.



Tools to Understand the Forces of Change and Their Implications for Your Organization

The place to start is with a deeper understanding of the Five Forces in the context for your own organization's strategic journey. To accomplish that, use the following suite of tools:

- **Forces of Change Learning Map® Facilitator Guide**– This guide provides the facilitator with instructions on how to lead a group discussion incorporating the entire Forces of Change suite of tools listed below.
- **Forces of Change Learning Map® (coming soon)**– This map visually depicts the Five Forces of Change.
- **Forces Assessment Handout**– This assessment list four topics for each of the five forces. HR leaders can rate each topic in terms of its expected impact on their organization. This assessment and the resulting discussion will help clarify how the five forces will impact a particular organization.
- **Forces Assessment Poster**– This poster integrates the different Five Forces Assessment handouts, to help facilitate a consensus on positioning for the impact of the forces.
- **Gap Assessment Poster**– This tool helps HR leaders to identify necessary organizational changes, for each of the five forces. Then leaders consider how to close the gaps.
- **Strategic Priority Poster**– This assessment starts with identifying obstacles and opportunities, then asks leaders to position those obstacles/opportunities on a graph of Strategic Impact vs. Ability to Execute.
- **CHREATE Cards**– These cards contain questions and content to facilitate the discussion of strategic workforce and HR priorities. Cards include: Macro Trends, Forces of Change, Core Themes, Sample Strategy, Discussion Starter, Strategic Priority, and **blank macro trend cards**.

Recommended Process to Address the Implications of the Five Forces of Change

The next step is to identify specific ways that your organization should respond to the Five Forces of Change. The team developed a three step process for organizations seeking relevant solutions for their situation:

- **STEP #1: Set the stage for out of the box thinking.**
It's difficult to do out of the box thinking in the regular routine of the office. Organizations need a venue, atmosphere and process that enables expansive thought.
- **STEP #2: Clarify and focus the problem statement.**
The five forces of change are too big to tackle as is, organizations need to focus on a specific way these forces will affect the organization; then direct the discussion to that area.
- **STEP #3: Leverage virtual brainstorming tools.**
It may well be difficult to get all the thinkers in one room at the same time. Virtual brainstorming tools can help overcome the problems of finding time and space (for example, this CHREATE team used a tool called **Stormboard**).

The disruptive change embodied in the Five Forces suggests that organizations will need to build new HR and organizational roles that extend and complement today's typical HR roles. For example, today's "talent acquisition" roles might evolve to resemble a "Global Talent Scout, Convener and Coach." Not all organizations will need to build all the roles, so the tools help diagnose organizational needs and current capabilities, and provide guidance to build the most pivotal roles.

The Four Future Roles of HR toolkit includes tools to help you: (1) Understand and explain the four new HR roles; (2) Learn about examples of the roles as they exist in organizations today; (3) Assess the capabilities for these new roles within your own organization; (4) Guide a discussion of the new roles; and (5) Provide resources to consider when building out capabilities. The Talent Pipeline team hopes you will use this toolkit to accelerate the development of the capabilities to fill these new roles.

The toolkit has five elements:

Understand and Explain the Four Roles

[This document](#) defines each role, lists the future capabilities, and describes the role using today's terminology. The four roles are:

1. **Organizational Performance Engineer**
Diverse forms of 'employment' and new ways of organizing and collaborating will challenge the traditional ways of working and require expertise in how organizations align, enable, inspire and reward people to accomplish shared goals and deliver results.
2. **Culture Architect & Community Activist**
There will be a shift away from legacy, company-centric world views and towards increasingly considering the ecosystem of all stakeholders—customers, suppliers, shareholders, 'employees' and the community at large. This requires companies to more actively engage this broad community while prioritizing the importance of culture and brand.
3. **Global Talent Scout, Convener & Coach**
Given the changing workforce dynamics of an increasingly global, connected world, HR will find new ways to source, engage, and connect talent in more agile, diverse and effective ways.
4. **Trend Forecaster & Technology Integrator**
Strategic thought leadership—and the ability to anticipate and respond to trends—will be increasingly important. This includes a deep understanding of data and talent analytics to drive decisions, as well as the ability to effectively leverage technology to deliver value.

The information is also provided in the form of

- [4 Roles Learning Cards](#) and
- Talent Pipeline Learning Map® (*coming soon*)– An illustrative drawing of the four roles.

Organizational Capability Assessment

abilities that an business will be required for HR to support the business in 2025 (see right column). Then go to the new roles defined on the previous page. We have also provided the most parallel (2025) organization 2025 capabilities (left column). Place an "X" in the box that best describes where your organization falls in capabilities needed for the future.

0 No capability	1 Developing capability	2 Some capability	3 Working to build capability	4 Most capability	5 Full capability	2025 Capability
						Network Architect Manages the network of business goals and projects for which people are assigned to meet advice and talents. Moves talent in and takes action to keep them and maximize their impact on organization.
						Virtual Team Guru Guides organization and its talents best ways to use all resources (employee, contractors, etc.). Teaches others how to effectively use virtual teams and individuals, regardless of their employment relationship or company and regardless of

Use Cases from Leading Organizations

These use cases ground the concepts of the future roles with examples from a sampling of organizations currently exemplifying the roles. The case studies are:

- Organization Performance Engineer: *Coming soon*
- Culture Architect & Community Activist: [Airbnb](#) and [Gap](#)
- Global Talent Scout, Convener & Coach: [PepsiCo](#)
- Trend Forecaster & Technology Integrator: [IBM](#)

Assess the Current Capabilities: [Web](#) or [PDF](#)

The assessment tool defines five capabilities for each of the four roles and a diagnostic aid to assess their team from 0 (Not currently in HR's scope) to 5 (Could act as a role model for this capability). With this understanding of the current state of these capabilities in their HR organization, a CHRO and their team can begin building a team for the future.

Engage the HR and Organization Leadership Team to Identify the Most Pivotal Future Capabilities

Leveraging Root Inc.'s Learning Map® approach, CHROs can use this tool to guide a discussion of the new roles with their HR leadership team. The tool includes:

- [Talent Pipeline Learning Map® Dialogue](#) – Instructions and tools to facilitate:
 - Exploring the four roles
 - Reviewing capabilities that define each role
 - Assessing your organization's status and need for each role
 - Building a capability development plan for the pivotal roles

Develop the Pivotal Capabilities

[This document](#) provides a starting point for listing resources that will help HR professionals develop their capability for each of the future roles. Over time, the CHREATE project will engage the broader HR community to add more work experiences or publications to help develop these new capabilities.

Team 3: The "Shaping Key Constituent Expectations about HR" Toolkit

Enhancing the HR profession itself is vital, but creating a "pull" for accelerated HR from key constituents is a pivotal element of HR evolution. Yet, often key constituents hold traditional expectations that limit that evolution. This team developed tools to help HR and its constituents clarify and enhance their expectations, and provide steps that HR and constituency leaders can take to accelerate that evolution. The team focused on the expectations of these key constituents:

- Boards of Directors
- CEOs
- Search Firms
- Investment Analysts & Private Equity Investors

The tools for each constituent group are:

The Board: Shaping their Expectations of Human Resources – a document for Board of Directors of publicly traded companies

This document helps Boards improve upon today’s expectations of the CHRO by distinguishing several traditional and emerging ways that this role creates value:

- Part one gives an overview of how the CHRO role with the Board is evolving. A Board could use this framework to identify the phase where their CHRO currently resides and what questions are applicable to that phase. The three phases are:
 1. Legacy -> CEO pay / Unions (HR does staff support)
 2. Current -> Succession, engagement, compliance culture (HR is a talent advisor)
 3. Emerging -> Workforce composition, diversity, globalization, culture (HR is an innovative strategist)
- The second part consists of a series of questions the Board should ask their organizations and themselves, to deepen their understanding of HR’s role.
- The third part is a multi-year calendar showing how vital talent issues fit within the existing typical operating rhythm of Board deliverables and activities. This helps Boards build appropriate talent discussions into their activities without additional meetings or changes to the calendar.

CEOs: A Maturity Path Discussion Guide

What should CEOs expect from their CHRO and their HR organization at different stages of maturity and evolution? This discussion guide helps CEOs define and articulate their current and future expectations of HR. The questions help a CEO see how the organization can mature from its current state to a more advanced future state. HR leaders can also use it to engage CEOs to identify what HR can and should be delivering to drive business outcomes, and how the CHRO and CEO partner to create the most relevant and pivotal HR contributions.

The guide is organized with the familiar Plan-Attract-Align-Engage workforce cycle, with three or four multiple-choice questions for each part of the cycle. When the questionnaire is completed, a results sheet calculates an overall rating for each part of the cycle, and lists resources that can help the organization move forward. This results sheet is a useful conversation starter between the CEO and HR to ensure they are aligned.

Search Firms: a Mobile App for CHRO recruitment

The Executive Search sub-team built a prototype personal device app for CEOs

working with Search Firms to identify a new CHRO. The app leverages inputs from the CEOs Maturity Path Discussion Guide and “[The Eight Archetypes of Leadership](#)” by Manfred F.R. Kets de Vries.

When a CEO completes the app’s questions, it identifies one of the eight persona/archetypes: Strategist, Change-Catalyst, Transactor, Builder, Innovator, Processor, Coach, or Communicator. It then provides actions on “How to” develop that persona; although the “How to” content needs further enrichment should this prototype app be developed.

The persona/archetype identified by the app serves as a starting point between the CEO and Search Firm to discuss the talent needs in the organization and potentially lead to:

- 1) Search firms and CEOs identifying talent that exemplifies the new capabilities needed in the future
- 2) Search firms identifying the matching talent
- 3) A deeper educational exchange between search firms and their clients.

Enhancing the Perspectives of Investment Analysts in Publicly-Traded and Private Equity Firms

The team explored the similarities and distinctions between investors and private equity constituents compared with other key constituents, acknowledged a few unique aspects worth capturing, and will continue to explore these issues further as the project continues. However, the main conclusion was that key constituents should expect HR leaders to deliver a common core body of capabilities and expertise, and that these more common elements are summarized in the team’s overall body of work.

Two sub-teams (one for private equity and one for publicly-traded firm investment analysts) provided resources that CHROs and other leaders can use to inform and influence private and public equity investment analysts’ perspectives on how future trends in work and HR affect value creation for investors. These resources include:

- A [short document](#) that identifies the unique roles/responsibilities of a CHRO as they collaborate and co-create with other members of the senior team in a private equity owned organization.
- Dave Ulrich [The Leadership Capital Index](#) Berrett-Koehler (2015)

The team urges the HR community to present these tools and concepts to the key constituents, engage those constituents in a productive conversation about current and needed expectations, and shape the expectations to better reflect the emerging future.

Meeting future challenges requires new approaches to HR that can drive and support the HR profession and its constituents. The Rewire the Work and Tools team identified existing and emerging tools and frameworks to help HR leaders and their constituents envision how to rewire the processes, practices, systems, and operating models that drive HR's deliverables and outcomes. The team identified five tools as examples:

- **Emergent Leadership**

As the forces of change approach, there will be a need to rewire the leadership role. [This whitepaper](#) describes the emerging leadership role, and provides questions to identify what leadership needs to look like in future organizations, who is a leader, and how leaders are developed.

- **Universal Corporate Diagnostic**

[This document](#) describes a platform that enables HR to extend beyond functional expertise to a more holistic view of company performance and culture. The envisioned platform would integrate customer survey questions with existing data such as engagement scores, brand data and customer data, to diagnose organizational needs and relationships with the greatest impact on strategic outcomes.

- **Agile Project Management Methods**

[This document](#) describes the team's review of "agile methodology" showing how and why HR organizations can adopt this approach to innovation and agility. Agile methodology has been used in areas such as software development to shorten project completion time, and increase customer involvement and satisfaction compared to the typical linear or waterfall approach.

- **The ROLE Project: Blending HR & Business Units to Optimize the Workforce**

[This document](#) describes a process to improve the margin contribution of the workforce by replacing low or no-value work with high-value work, and better aligning talent to the work. The ROLE process digitalizes work, transforms work and talent, and measures the return.

- **The "Lead the Work" Planning Platform**

[This document](#) describes the framework and potential tools to shift from a focus on leading "employees" to "leading the work" as described in the book, *Lead the Work*, by Boudreau, Jesuthasan and Creelman. As hyper-specialization of workers increases, work will be deconstructed into projects and tasks. HR needs to rewire workforce planning to focus beyond exclusively managing employees in defined roles, and toward matching tasks to workers from many different sources. HR will need to develop knowledge of, and in some instances build internally, tools, databases and platforms that will enable them to identify and staff projects based on key skills required.

Applying the Rewiring Tools at [HERE](#) and the Era of Hyper-specialization.

[HERE](#) is an information technology and services firm providing advanced innovative location and navigation intelligence. The firm plans to use the Agile Project Management Methods, consider the new roles for HR, and build an



internal talent platform that can source talent for existing projects, rotations, new positions and redeployment.

Team 5: An Engagement Platform to Enhance and Expand the CHREATE Movement

The tools and frameworks built by CHREATE project's volunteers have attracted the attention and sparked the imagination of a large and growing group of HR and organization leaders, who wish to apply them, enhance them, and share their work with their peers. How can the CHREATE work of today become a broader social movement to disruptively accelerate the evolution of HR?



A key element is an Engagement Platform. This “Engagement Platform” team identified the technology, structure and resources necessary to build a social meeting place where CHREATE content will be available, and a wider audience to use, develop and share it. The team’s framework and demonstration vividly showed the value and the potential of an interactive website to widely disseminate the CHREATE content, and become a gathering place to engage and collaborate with other CHREATE team members. The team used the Everwise SaaS platform to demonstrate the potential engagement platform. This software includes content curation, talent development, and community discussions.

The impressive potential for this Engagement Platform to support a broader CHREATE movement led the CHREATE leadership team to commit to building a working prototype, and to invite new CHREATE members to help design and test it.

What's Next

The CHREATE leadership will now work to disseminate CHREATE’s ideas and tools to a broader audience. The goal is to stimulate application and development in the wider community and among key constituents. The team will accomplish this dissemination and engagement through two primary initiatives, an eBook and a prototype web-based dissemination and engagement platform:

- **CHREATE eBook.** The Society for HR Management (SHRM) and Human Resources People + Strategy (HRPS) have committed to publish an eBook, with chapters that capture the work of the CHREATE teams, the tools the teams developed and the emerging use cases that describe how the tools are applied to change organizations. The eBook will be edited by [John Boudreau](#) and [Ian Ziskin](#), CHREATE project leaders.
- **CHREATE Engagement Platform.** The CHREATE leadership team will build on the work of the Engagement Platform team, taking their ideas and working with Everwise to produce a beta version of the CHREATE platform. The goal,

by the end of 2016, is to produce a detailed prototype of the interactive site, as well as several demonstrations that show how the site can support “missions” such as using the tools to enlighten leaders, support organizational change, and offer a vehicle for agile tool development and user engagement.

Individuals and groups of **CHREATE** volunteers will also pursue writing, publishing, working with associations, and testing the ideas with their own teams and in their organizations. The results of these activities will be tracked and included in the **CHREATE** platform through the end of 2016. **CHREATE** sponsors will also play an important role in spreading the word and incorporating the **CHREATE** results into executive development, competency frameworks, events and conferences, and executive search and succession tools.

We also encourage individual HR professionals to take up the insights of the **CHREATE** project and bring it to life in their own organizations. Anyone with an interest in the future of HR should use the tools, improve the tools, and share their insights with the broader HR community. The **CHREATE** project leadership team will be exploring ways to continue, fund, and grow the project’s impact during late 2016 and early 2017. Plans and priorities will continue to evolve. We welcome questions and suggestions, as well as offers of funding and volunteer support. Please contact our program manager, Carolyn Rearick at crearick.fhrproject@gmail.com to learn more.

CONTACT INFO

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