



# Enterprise Learning and Talent Management 2008

*Predictions for the Coming Year*

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## This Research

Every year, we try to help our research members by providing our predictions for the coming year. Last year, we predicted growth in learning and development (L&D) budgets, increased growth in leadership development and management training, and a continuing evolution in technology-based learning approaches. This year, the business world continues to evolve, so our predictions build and extend those trends.

### 1. Talent Management Becomes the #1 Topic for HR and L&D.

#### PREDICTIONS



We believe talent

management represents the “third wave” of the evolution of the HR function. In 2008, we will see more HR teams reorganize their staffs – and, in many cases, create a new role of vice president or director of talent management that will be tasked to pull together an enterprisewide integrated talent management strategy.

As we have continuously cited in our research, 2008 represents the sixth year of an economic boom. This economic growth has created tremendous business opportunities and competitive restructuring in many industries. Our *High-Impact Talent Management*<sup>1</sup> research cited business growth, expansion and competition as the top business issues facing most businesses.

Coupled with this growth, however, is a rapid change in available talent. Organizations now clearly understand that they must live in a world with a multigenerational workforce. Most older corporations have four distinct worker populations. The “traditionalists” are now retiring (*MetLife, for example, anticipates that as many as 20 percent of its existing workforce will retire within the next five years*).

Younger workers are entering the workforce with more idealistic goals – seeking meaningful work, collaborative work environments and a place in which to grow, but not necessarily a place at which to build a career. Young workers are expected to change jobs 12 to 15 times during their careers and even change careers several times. How do growing businesses attract this new workforce and build an attractive environment in which they can grow?

<sup>1</sup> For more information, *High-Impact Talent Management: Trends, Best Practices and Industry Solutions*, Bersin & Associates / Josh Bersin, May 2007. Available to research members at [www.elearningresearch.com](http://www.elearningresearch.com) or for purchase at [www.bersin.com/hitm](http://www.bersin.com/hitm).

**Figure 1: The Multigenerational Workforce**

Demographic Group	Year Born	Traits and Values	Learning Styles
Traditionalists	1928-1945 (62+ years old)	Hierarchical, loyal to institutions, and motivated by financial rewards and security.	Traditional, instructor-led, reading, homework <b>"teach me."</b>
Baby Boomers	1946-1965 (42-61 years old)	Idealistic, competitive and striving to achieve.	Traditional, group effort, expert-driven, self-driven, <b>"lead me to information."</b>
Generation X	1966-1981 (26-41 years old)	Self-reliant, willing to change rules, and tribal and community-oriented.	Team-driven, collaborative, "wisdom of crowds," peer-to-peer <b>"connect me to people."</b>
Generation Y (Millennials)	1982-2000 (7-25 years old)	Confident, impatient, socially conscious, family-centric and technology-savvy.	Give context and meaning, make it fun, search and explore, entertain me, <b>"connect me to everything."</b>

Source: Bersin & Associates, 2007.

Integrated talent management is the answer. Organizations of almost all sizes are now starting to build complete, business-driven talent management strategies (which often require breaking down the existing silos within HR specialties). These new strategies require a focus on building a holistic view of talent management for the organization – one which includes sourcing and recruiting, onboarding, career development, performance management, coaching, leadership development, and succession management.

The impact of this change on HR is tremendous – in fact, we believe that talent management represents the "third wave" of human resources. HR teams are reorganizing their staffs, and often creating a new vice president or director of talent management role to pull together such an integrated strategy.

In 2008, this trend will accelerate. HR organizations will continue to:

- Reorganize;
- More tightly tie together their HR specialists; and,

**Figure 2:** The Evolution of the HR Function

Source: Bersin & Associates, 2007.

- Develop business-driven talent management programs (that focus on solving the specific business challenges in their operational business units).

Our research shows a tremendous focus on:

- Talent pool-specific strategies;
- Revamping performance and succession management;
- More tightly integrating learning into HR; and,
- The implementation of new talent management systems.

The impact on L&D organizations is profound and positive. Most of our research members are going through reorganizations that bring learning and development professionals into a more integrated team structure. We see tremendous growth in career development and competency-based learning programs in the coming years, as well as a continuous focus on integrating L&D investments into all steps in the

talent management cycle. This is a wonderful time to have a career in training or organizational development – there are many exciting new opportunities through which to add value.

## 2. Tremendous Growth in Leadership Development, Management Training and Succession Management.

### PREDICTIONS



In 2008, we expect more

funding and a higher priority to be placed on leadership development and management training. We also believe that one of the keys to success in 2008 will be the integration of leadership development into the entire management and supervisory development process, bringing it out of the realm of “upper management only.”

Our 2007 research shows that the top two areas of focus and improvement in corporate HR today are leadership development and succession management.<sup>2</sup> Why is there such tremendous focus? Because the top talent challenge faced by organizations is the need to rebuild the leadership pipeline.<sup>3</sup>

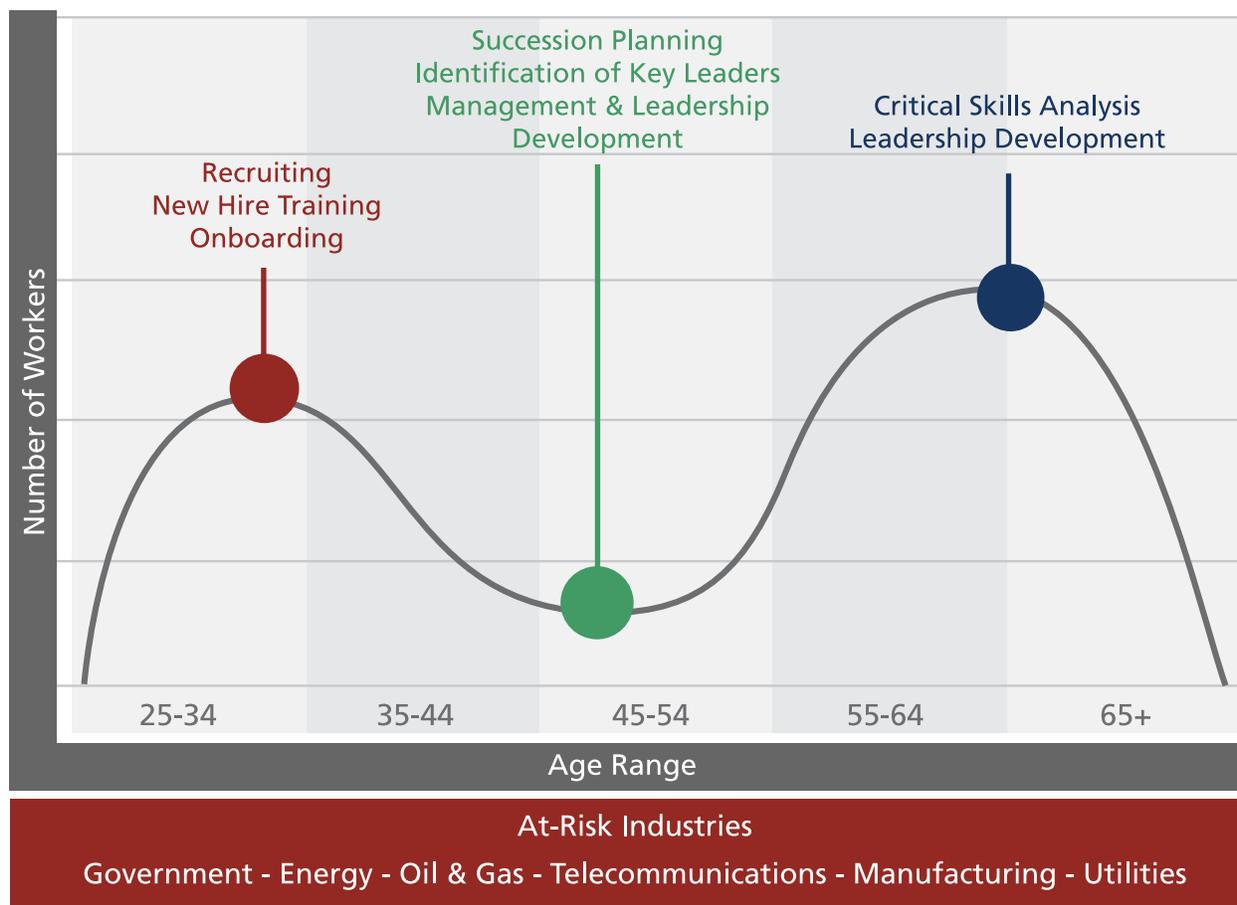
As Figure 3 illustrates, organizations today are facing demographic and skills gaps in the area of mid-level managers. Almost every industry we speak with – high technology (Qualcomm), retail (McDonald’s and Starbucks), defense (BAE and Raytheon), insurance (AIG, Marsh and MetLife), financial services (Bank of America and Citibank) – sees a tremendous need to build up its mid- and upper-level management pipelines. In some companies, the problem is one of building supervisory and first-line management skills. For others, the problem surfaces as a need to build the management and leadership pipeline among director and above levels.

Bottom line: More than 20 percent of corporate L&D dollars are spent in the area of management and leadership development. These dollars go into a wide variety of important programs, such as:

- Development programs;
- Coaching;
- Mentoring;
- 360 assessments; and,
- Succession management.

<sup>2</sup> For more information, *High-Impact Talent Management: Trends, Best Practices and Industry Solutions*, Bersin & Associates / Josh Bersin, May 2007.

<sup>3</sup> Ibid.

**Figure 3:** The Need to Rebuild the Leadership Pipeline

Source: Bersin & Associates, 2007.

Our four-stage Leadership Development Maturity Model<sup>4</sup> (introduced this year) gives organizations a roadmap for spending these dollars wisely.

Unfortunately, our research found that less than eight percent of all organizations currently operate at Level 4. In 2008, this area will be more important than ever, and we expect more funding and a higher priority to be placed in this area. In addition, we believe one of the keys to success in 2008 will be the integration of leadership development into

<sup>4</sup> For more information, *High-Impact Leadership Development: Trends, Best Practices, Industry Solutions and Vendor Profiles*, Bersin & Associates / Kim Lamoureux, August 2007. Available to research members at [www.elearningresearch.com](http://www.elearningresearch.com) or for purchase at [www.bersin.com/hild](http://www.bersin.com/hild).

**Figure 4:** Four-Stage Leadership Development Maturity Model<sup>5</sup>

\*Percentages equal the percent of organizations at each level of the Maturity Model.

Source: Bersin & Associates, 2007.

the entire management and supervisory development process, bringing it out of the realm of “upper management only.”

### 3. e-Learning Continues and Social Networking Hits Corporate America.

We are now in the eighth year of widespread adoption of Internet-based training and collaboration in business. The third major trend we see in 2008 is the continuous need to improve the e-learning experience, and the emergence of “social networking” as a new theme among corporate HR and L&D strategies.

<sup>5</sup> For more information, *High-Impact Leadership Development: Trends, Best Practices, Industry Solutions and Vendor Profiles*, Bersin & Associates / Kim Lamoureux, August 2007.

## PREDICTIONS



The third major trend for 2008 is the continuous need to improve the e-learning experience – and the emergence of “social networking” for corporate HR and L&D strategies.

We all know well that e-learning has been both a tremendous tool (and frustration) for companies. While the term “e-learning” has been around since late 1999, our research this year was surprising. Almost 75 percent of organizations still do not feel that they have implemented a sound and complete blended-learning strategy for their corporate training programs. While almost 30 percent of all training hours are now conducted online, organizations still feel somewhat frustrated that they have not been able to create the high-performance solutions their organizations need.<sup>6</sup>

The problem we face is that the e-learning tree continues to sprout branches. What was once exciting and groundbreaking (e.g., page-turning webpages) is no longer dynamic or exciting enough for today’s technology-savvy workers.

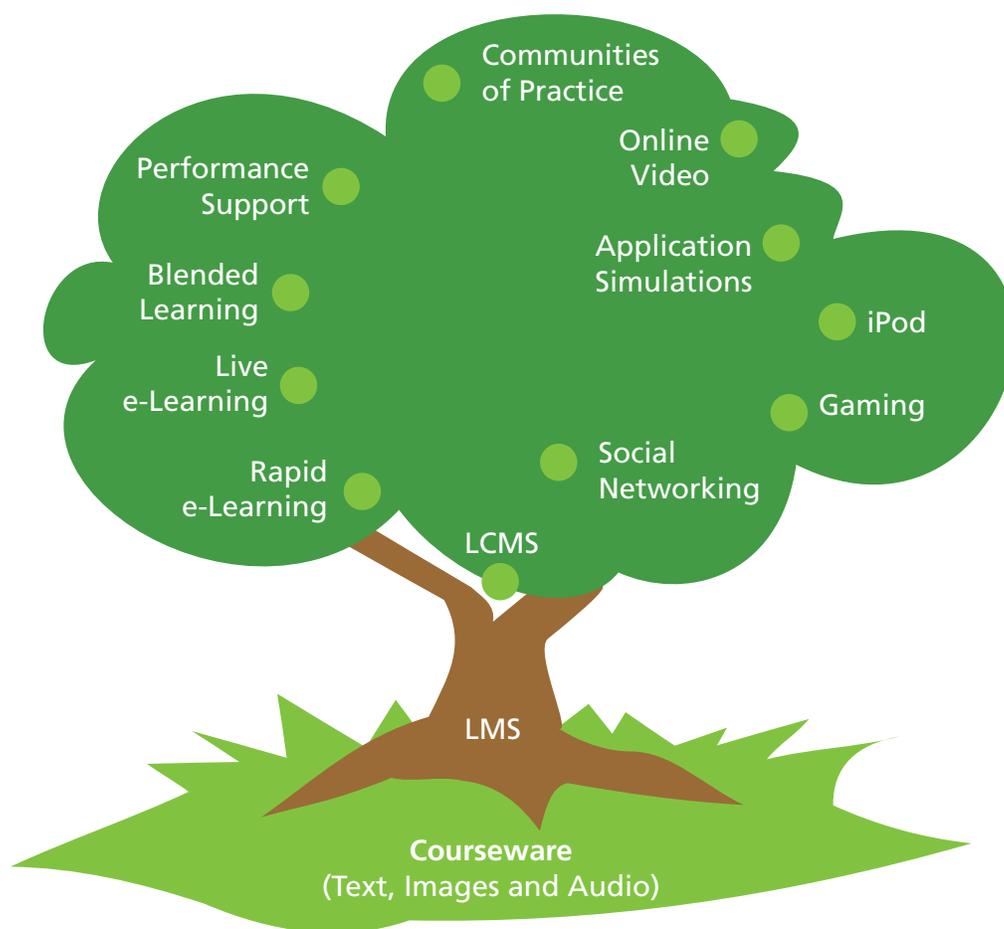
**Figure 5: State of e-Learning Today<sup>7</sup>**

Rating of Effectiveness	World-Class or Excellent	Traits and Values Learning Styles
Blend e-Learning and ILT Effectively	23%	52%
Build High-Impact Courseware	19%	56%
Build e-Learning Rapidly	19%	58%
Implement Collaborative Approaches to e-Learning	16%	59%
Build Simulations and Other High-Fidelity Programs	13%	78%
Implement Learning On-Demand	8%	74%

Source: Bersin & Associates, 2007.

<sup>6</sup> This information is based on our industry report, *High-Impact Learning Organization*, the report for which is available now – with a new edition coming in 2008. For more information, please visit [www.bersin.com/hilo](http://www.bersin.com/hilo).

<sup>7</sup> Ibid.

**Figure 6:** The Evolving and Growing Tree of e-Learning

Source: Bersin & Associates, 2007.



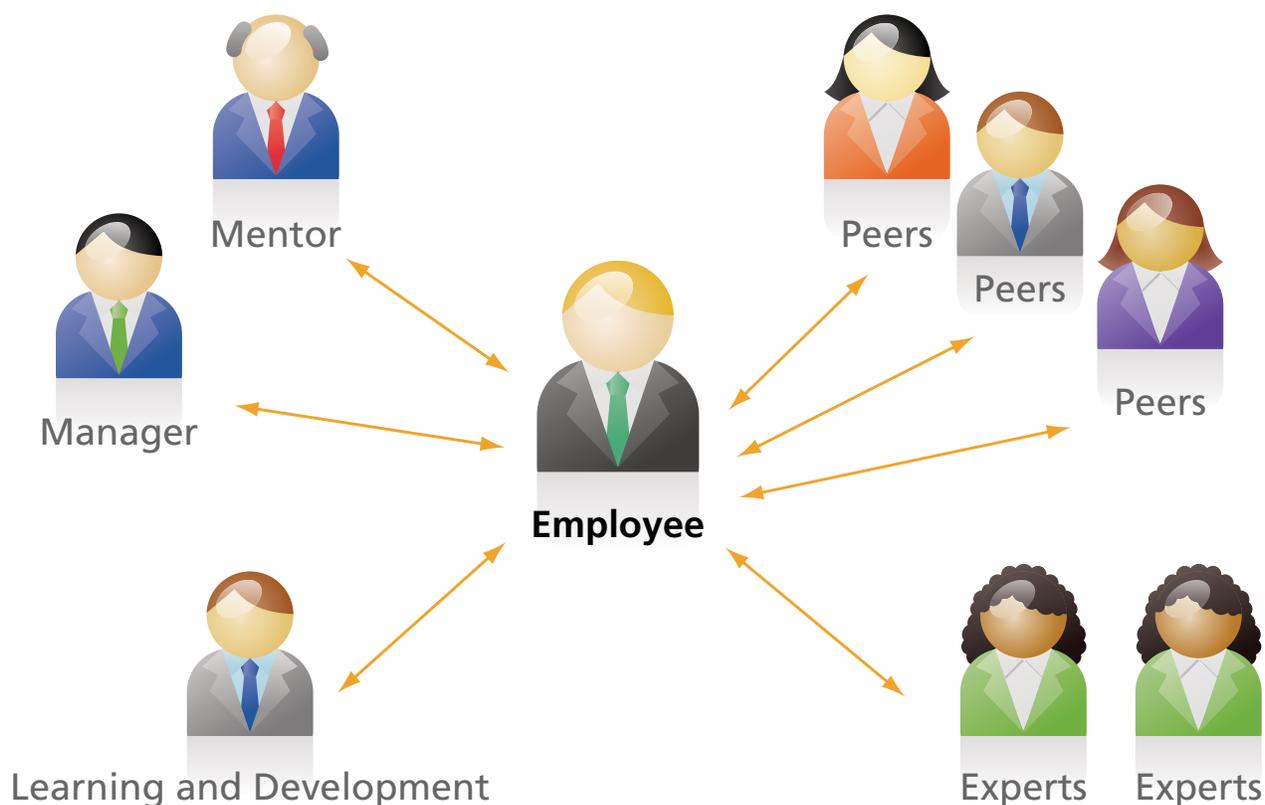
#### KEY POINT

“Social networking” uses person-to-person networking approaches to facilitate collaboration, learning, knowledge-sharing, the location of experts and organizational communication.

In 2008, we will see a new “branch” of the tree of e-learning grow in strength and breadth – the use of social networking. While the term “social networking” is not yet well-defined in corporate America, to us it represents the use of person-to-person networking approaches that facilitate collaboration, learning, knowledge-sharing, the location of experts and organizational communication.

Consider how people interact and learn in today’s organizations. They no longer go to their managers or training departments – they rely upon peers, friends, mentors and experts, as well as managers and trainers.

Facilitated by networking, mobile devices and working from home, the new learning model is one of networks. The “social network” in organizations is critically important to making organizations succeed.

**Figure 7:** Today's Organization Learning Model

Source: Bersin & Associates, 2007.

Almost 28 percent of our *High-Impact Learning Organization 2008* study<sup>8</sup> respondents cited a “very strong” need to improve internal collaboration in their learning strategies in the coming year. With the advent of easy-to-buy and easy-to-implement social networking systems, we believe that in 2008 organizations will adopt pilot programs and production rollouts of “internal FaceBook<sup>9</sup>” applications for their companies.

<sup>8</sup> This information is based on our industry report, *High-Impact Learning Organization*, the report for which is available now – with a new edition coming in 2008. For more information, please visit [www.bersin.com/hilo](http://www.bersin.com/hilo).

<sup>9</sup> “Facebook” refers to the popular social networking site [www.facebook.com](http://www.facebook.com). Other examples include LinkedIn, MySpace, along with many others that are currently in development. Product companies focusing on the corporate market here include Mzinga ([www.mzinga.com](http://www.mzinga.com)) and Tomoye ([www.tomoye.com](http://www.tomoye.com)), and we expect many others to enter this space in 2008.

## 4. The LMS Market Shifts Dramatically.

### PREDICTIONS



For 2008,  
organizations

must integrate the LMS into the company's tapestry of talent management systems. Also, more companies are pushing their LMSs into the "background," using content management systems to build a more integrated end-to-end "employee portal."

Over the years, we have heavily focused our research and advisory services on the implementation and evolution of learning management systems (LMS). This market (now more than \$600 million in size) is going to change tremendously in 2008 – and we see the following two major trends occurring.

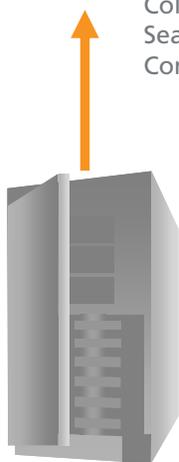
First, organizations know they need an LMS for a wide variety of uses. Not only does this system manage all the corporate training, compliance and customer education programs – but it also houses learning content, competency-based learning and career development programs. As talent demands become more important than ever, the LMS has become more mission-critical every year.

But as this demand has grown, the market has shifted. In essence, we see the LMS market moving in two tangential directions. On the one hand, organizations now realize that the LMS must do more than manage training – it must integrate into the company's total tapestry of talent management systems. The LMS must:

**Figure 8:** Evolution of the Corporate LMS

### Increase in Enterprise Learning Capabilities

Tools, LCMS, Content Integration, Analytics, Domain Management, Collaboration Systems, Publishing, Performance Support, Search, Web Services, Portals, Self-Publishing, Communities of Practice, Blogs, Wikis, Online Video....



### Increase in Talent Management Capabilities

Employee Profiles, Job Descriptions, Performance Management, Succession Management, HiPo Selection, Manager / Employee Portals, Assessments, Recruiting, Applicant Tracking, Internal Recruiting, Compensation, Workforce Analysis, Career Planning, Candidate Selection, Competency Analysis, Skills Gap Analysis, Integration or Building of HRMS Interface to External Data Sources....

**Today's LMS Systems**

Source: Bersin & Associates, 2007.

- Integrate with performance management and development planning;
- Manage and support leadership development and succession management; and,
- Serve as a competency management system for competency-based learning programs.

These demands are forcing the LMS closer and closer to organizations' HRMS and talent management needs. Today, our research shows that more than 30 percent of all LMS purchases are now made in the context of an overall integrated talent management systems strategy. What does this mean? LMS vendors are scrambling to build performance and talent management features – and almost every one has formally entered the talent management systems market.

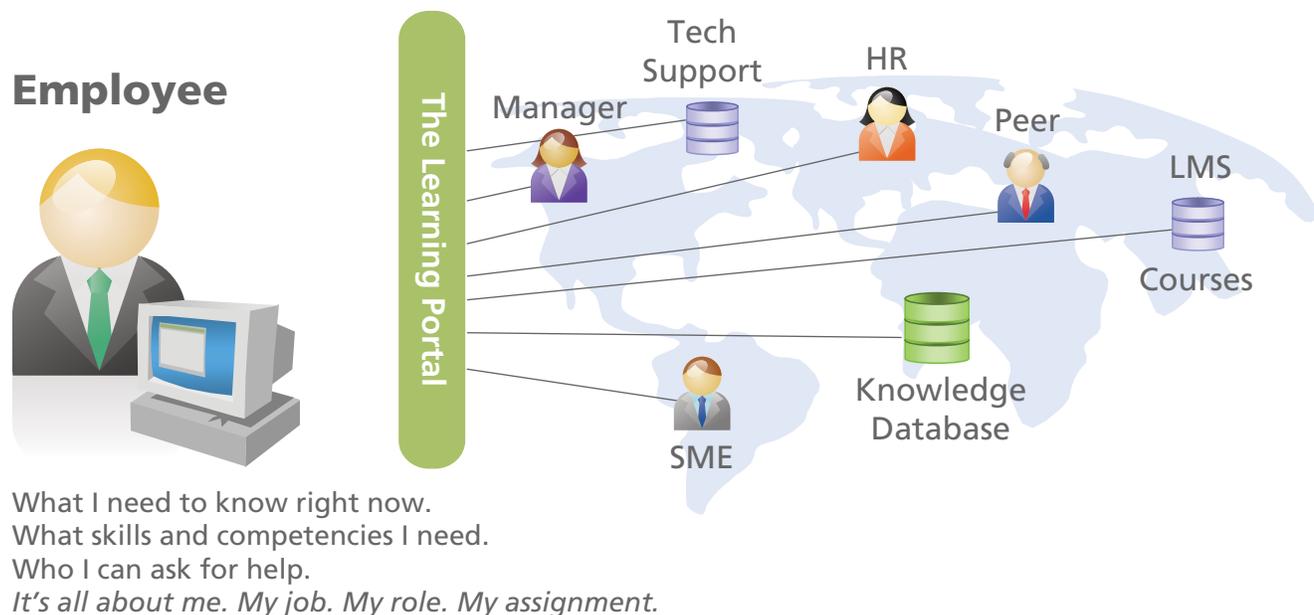
For buyers, it means that the decision to buy an LMS is now somewhat more complex. Should you select a system that focuses heavily on the arcane and complex processes of training, or should you focus on a solution that integrates performance and talent management? As this market grows, other vendors are entering the space. Talent management systems vendors (see section, "6. The Market for Talent Management Suites Explodes, Led by Performance Management.") are slowly but surely building LMS systems of their own – so we expect this market convergence to continue.

But a second and, perhaps, more disruptive theme is occurring. People now realize (through their experiences with the Internet) that an LMS is not a very compelling or interesting system for workers. The LMS "design paradigm" has revolved around the use of a course catalog. Today's workers want more than just formal training – they seek searchable learning that is available on-demand.

We identified this trend almost four years ago when we first published our Four-Stage Maturity Model for e-Learning.<sup>10</sup> Today, this is becoming a reality. More and more companies are telling us that they are pushing their LMSs into the "background" and are using content management systems to build a more integrated end-to-end "employee portal." This portal provides learning, information, collaboration, social networking, goals, benefits and more. The LMS is becoming a "back-office" system again.

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<sup>10</sup> For more information, *The Four Stages of E-learning: A maturity model for online corporate training*, Bersin & Associates / Josh Bersin, October 2005. Available to research members at [www.elearningresearch.com](http://www.elearningresearch.com) or for purchase at [www.bersin.com/stages](http://www.bersin.com/stages).

**Figure 9: Learning On-Demand**

Source: Bersin & Associates, 2007.

In 2008 these trends will continue, forcing LMS buyers and vendors to further invest in their LMS infrastructures. LMS buyers will now look at integrated talent management systems strategies as part of their LMS systems purchases.

## 5. L&D Starts to Recentralize (Yikes!).

We have been studying the organization and governance of corporate learning since 2003. Over the last five years, there has been a steady trend toward what we call the “federated<sup>11</sup>” model of L&D – a strong “central government” (e.g., corporate training function or learning services organization) that manages corporate programs, training technology and other best-practice functions – coupled with a strong set of “state governments” (functional training departments, such as sales training, customer service training, IT training and others), which use the infrastructure of the central group but operate fairly independently.

<sup>11</sup> A “federated model” has a small core team that manages some technology and corporate programs, and empowers business and functional units to run their own training programs.

## PREDICTIONS



Over the last five years, there has been a steady trend toward what we call the “federated” model of L&D. While this trend will continue in 2008, another trend is also emerging – the “corporate university” is being reborn in a virtual form to respond to the need to recentralize L&D resources.

This federated model is difficult to implement but powerful in action. In 2007, we worked with dozens of organizations to implement such models – and we expect this trend to continue in 2008.

However, another trend is occurring. The “corporate university” (which used to represent the corporate training center) is being reborn in a virtual form. While we believe that the traditional concept of a corporate university has become almost obsolete (with more than 30 percent of corporate training online, more and more of the investments in brick and mortar are going into content and systems every day), the need for centralization is back.

Why is this? L&D is becoming critically important to talent management (as described in the section, “Case in Point: Healthcare”).

### Case in Point: Healthcare

We have been working with one of our clients (that is one of the industry’s largest healthcare providers) to pull together its integrated talent management strategy. In doing so, the organization realized that there are a variety of unique and difficult talent challenges in each talent pool. The nursing population, for example, suffers from shortages and a lack of management training. The physician population needs greater career mobility and modifications in compensation. Customer service and support professionals need better systems and management processes to increase their customer focus. Each of these talent pools has unique L&D challenges, many of which demand new integrated career-development or competency-based training.

With more than 600 people in the L&D organization, this problem was clearly solvable. But with all these L&D people reporting directly to the business units, this organization was unable to provide the focus, expertise and integrated approach to address these problems. So, they recentralized the entire organization. While the individual L&D professionals will continue to be located and functionally aligned with their business customers, they will now be part of an integrated talent management team. ↻

We believe this trend is likely to continue in 2008. As you read through our talent management research, think about how you can better leverage your L&D investments in this manner.

## 6. The Market for Talent Management Suites Explodes, Led by Performance Management.

### PREDICTIONS



In 2008,  
the market

for integrated talent management software will continue to accelerate and organizations will put plans in place to implement such solutions. While our research finds most large organizations cannot possibly replace the tapestry of HR systems they have, many are starting to put together long-term strategies to replace older systems with these new suites.

After many years in the enterprise solutions marketplace, we have learned to be skeptical and patient when new software solutions come to market. In most cases, during the first few years a new system becomes available it is used by “early adopters” – organizations that are likely to take risks to gain competitive advantage.

In the case of performance and talent management systems, however, the market has ignited like a wildfire. As our upcoming industry study on talent management suites<sup>12</sup> illustrates, the market for talent management suites is already almost \$2 billion and growing.

We define this market as the market for integrated software that handles recruiting, performance management, learning management, compensation, and the surrounding processes of succession management and career development. Over the years, these processes have been automated by various vendors at different points in time.

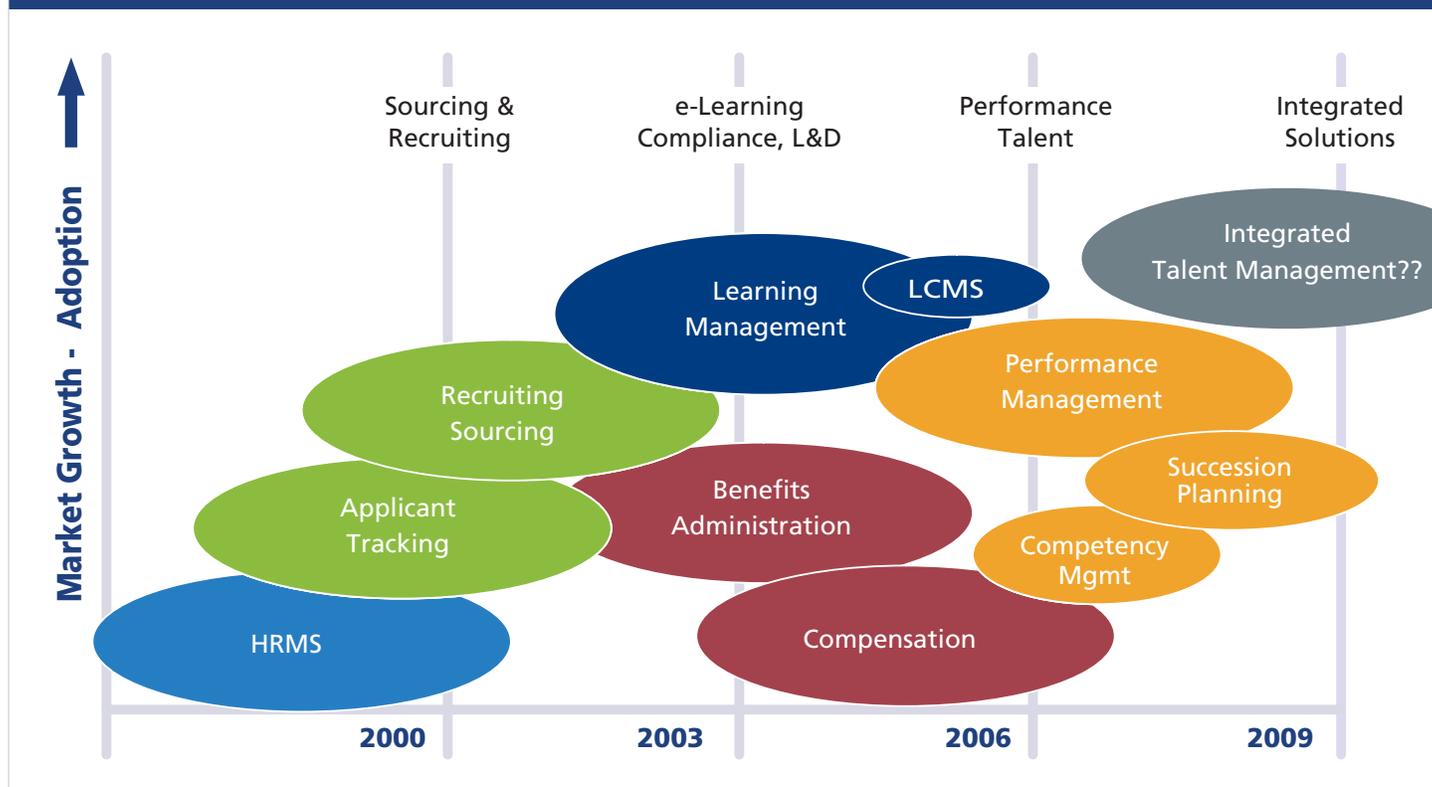
Today, the hottest “new” application among these systems is performance management – which is now offered by almost every HR systems vendor in the market (more than 30 such vendors offer this solution). The current leader in this space, SuccessFactors, recently went public with a market valuation of almost 10 times its sales (*these valuations are reminiscent of the dot-com era*).

Our *High-Impact Talent Management* research<sup>13</sup> identified the top 22 HR processes that drive the highest levels of impact<sup>14</sup>. Not surprisingly, seven of these fell into the category of performance management. Almost

<sup>12</sup> This information is based on our current research on the topic of the talent management suites, the report for which is due to be published in early 2008. For more information, please visit [www.berstein.com/tmsuites](http://www.berstein.com/tmsuites).

<sup>13</sup> For more information, *High-Impact Talent Management: Trends, Best Practices and Industry Solutions*, Bersin & Associates / Josh Bersin, May 2007.

<sup>14</sup> For more information on these top 22 HR processes, please visit [www.berstein.com/top22](http://www.berstein.com/top22).

**Figure 10: The History of HR Systems**

Source: Bersin & Associates, 2007.

every company we talk with is now either considering or in the process of replacing its software-driven performance management system.

### ANALYSIS

With regard to performance management applications, Bersin & Associates strongly urges companies to focus on the business process first – and from there develop a systems strategy.<sup>15</sup>

While we do not necessarily agree with many of the vendor marketing strategies in this space (we strongly urge companies to focus on the process, not the system), there is a huge HR systems transformation taking place. Almost each and every new performance management system decision is now coupled with a decision to replace or implement an integrated talent management platform. Also, the HR software vendors are feeding the fire (so to speak) by integrating and acquiring applications as fast as they can.

In 2008, the market for integrated talent management software will continue to accelerate and organizations will put plans in place to implement such solutions. While our research finds that most large

<sup>15</sup> For more information, please read our talent management suites research at [www.bersin.com/tmsuites](http://www.bersin.com/tmsuites).

organizations cannot possibly replace the tapestry of HR systems they already have (more of a “Tower of Babel” for a large number of companies), many are starting to put together long-term strategies to evolve and replace older systems with these new suites.

## 7. The HR and L&D Outsourcing Market Lurches Forward.

Whenever major changes take place in a market, many enterprising vendors jump into the space and offer to “do it all for you.” The HR and L&D outsourcing markets are doing just that.

First, the market for learning outsourcing providers continues to grow. As organizations now realize that customized high-fidelity e-learning is difficult to build, the market for outsourced content development has increased. We estimate the market for custom content development at more than \$1.4 billion and rising. Companies (like Accenture, Allen, General Physics, Intrepid, Raytheon, RWD and many others) continue to see growth.

Similarly, the need for off-the-shelf online training has continued to become more mainstream – leading to the consolidation of content providers into a few. Today, GlobalKnowledge, NIIT (the merger of NIIT, Cognitive Arts and ElementK) and SkillSoft (the merger of SkillSoft, SmartForce, KnowledgeNet and NetG) and a few other vendors encompass almost 60 percent of the market for off-the-shelf content. At the same time, as the e-learning space grows each year more and more industry-specific solutions become available – making it easier to buy content instead of building it.

But just as corporate training and HR are being integrated, so are the outsourcing options. In the area of learning and HR technology, every major HR outsourcing vendor has now introduced the capability of outsourcing your entire suite of HR applications. For example, Accenture combined its Accenture Learning and Accenture HR Outsourcing practices into an integrated team. Convergys has successfully integrated its HR Outsourcing services with DigitalThink’s content development organization. IBM’s Human Capital Services organization is now pulling together its HR and L&D consultants into an integrated team. ACS, EDS / Excellerate / Towers Perrin, Hewitt, Mercer and others have also entered this market.

### PREDICTIONS



In 2008, we believe that HR and L&D outsourcers will expand their capabilities and continue to integrate their solutions. In the area of learning and HR technology, every major HR outsourcing vendor has now introduced the capability to outsource your entire suite of HR applications.

Have companies been successful outsourcing their HR technologies and operations? Here, the answers are more spotty. Our research members tell us that they continue to look for opportunities to outsource the “non-strategic” parts of HR. In 2007, we completed a very extensive research project on the price-to-value ratio of HR and learning services – and we found that successful outsourcing projects require a very clear set of objectives. Organizations that outsource for the “wrong reasons” are often frustrated.

In 2008, the topic will become more important than ever. We believe that HR and L&D outsourcers will expand their capabilities and continue to integrate their solutions.

## 8. Talent Management Becomes a Business Topic.

### PREDICTIONS



In 2008,  
successful

HR organizations will focus on making talent management an integrated part of their business strategies by refocusing their HR “processes” toward a business-driven talent plan that they build in conjunction with their business leaders.

Let me add one final thought for 2008. In 2006 and 2007, we spent a lot of time trying to “define” talent management. In 2008, it is time to “make it real” – that is, stop talking about what it is and start making it real. Our research clearly shows us that talent management is not an HR strategy – it is a business strategy. In 2008, successful HR organizations will focus on making talent management an integrated part of their business strategies. They will do this by refocusing their HR “processes” toward a business-driven talent plan that they build in conjunction with their business leaders.

We could see a business slowdown or even a recession in 2008. If we do, the importance of talent will not change. Your job is to use your skills, tools and experience to create and implement talent management strategies that drive results. We will be here to help you.

## Come Visit with Us in 2008

In 2008, we will be further expanding our workshop and events program to bring research and best practices to your organization. In particular, we will be launching our first-ever research conference, IMPACT 2008: The Business of Talent®<sup>16</sup>. We hope you will join us to hear more than 60 senior HR and L&D executives share their experiences and best practices with you.

Our workshop program<sup>17</sup> in 2008 will focus on providing you with the research and best practices to help your organization succeed. Some of these include:

- Building a High-Impact Learning Organization®;
- The Talent Management Masters Series®;
- Implementing High-Impact Leadership Development; and,
- Building the Business Case for Talent Management Systems.

## Join Our Research Membership Program

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<sup>16</sup> For more information about this conference, please visit [www.bersin.com/impact](http://www.bersin.com/impact).

<sup>17</sup> For more information on our upcoming events and webinars, please visit [www.bersin.com/newsevents](http://www.bersin.com/newsevents).

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## About This Research

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