The Cognitive Enterprise for HCM in Retail

Powered by IBM & Oracle
The Cognitive Enterprise for HCM in Retail: Powered by IBM & Oracle

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A new era of business reinvention is dawning in the Retail Industry. Organizations are facing an unprecedented convergence of technological, social and regulatory forces. As cloud, artificial intelligence (AI), automation, Internet of Things (IoT), blockchain and 5G become pervasive, their combined impact will reshape standard business architectures and business as usual.

We call this next-generation business model...

**The Cognitive Enterprise**
The shift to a Cognitive Enterprise
Radically changes how organizations create, deliver, and capture value

Figure 1
Major technological evolution

<table>
<thead>
<tr>
<th>WHAT</th>
<th>HOW</th>
</tr>
</thead>
<tbody>
<tr>
<td>Early information technology improved efficiency by applying technology to individual resources or processes</td>
<td>Digital transformation digitizes whole aspects of a business producing customer experiences that support what individuals need or want</td>
</tr>
<tr>
<td>• Paper tracking</td>
<td>• Process automation point solutions</td>
</tr>
<tr>
<td>• Lift and shift</td>
<td>• Design thinking principles</td>
</tr>
<tr>
<td>• Limited use productivity tools</td>
<td>• Enterprise adoption and change management</td>
</tr>
<tr>
<td>• Labor arbitrage</td>
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<tr>
<td>• Localized practices</td>
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</table>
66% of CEOs believe cognitive computing can drive significant value in HR.

50% of HR executives recognize that cognitive computing has the power to transform key dimensions of HR.

54% of HR executives believe that cognitive computing will affect key roles in the HR organization.

Source: IBM Institute for Business Value
IBM Smarter Workforce Institute

What is a Retail Cognitive Enterprise?

Changing customer expectations along with pervasive interconnectivity has created a demand for Digital Reinvention®. The introduction of self-learning “smart” technologies in the form of AI, IoT and blockchain in the retail industry is already happening.

North Face Uses IBM Watson

Not sure what coat you should buy? Not to worry, at North Face, IBM’s Watson asks a series of questions to understand where the coat will be worn and what activities will be primarily performed, etc. IBM Watson’s cognitive computing technology analyzes the answers and makes personalized recommendations to help customers find the perfect coat.
Robots to Locate Items
A major big-box home improvement store has introduced robots which roam the store and ask in-store customers some simple questions to understand what they are looking for and then guide them to the right product whilst sharing specialty knowledge.

The race for more revenue and greater profits has expedited the adoption of cognitive solutions directly impacting increases sales by improving customer experience. A happy customer is more likely to make a purchase and become a repeat customer.

With regards to employee experience and focus, IBM Watson’s cognitive engine can help the retail industry with decision-making support for key employee day-to-day decisions at the workplace:

- **Vacation requests** – Employees entering vacation requests can be advised on the likelihood of the request being approved vs. declined based on prior vacation requests, busy times and days for the business and other factors
- **Determining one’s mood** – Listening to the inflections and tone used by an employee during a client call may trigger a recommendation for the employee to take a break before attending the next call
- **Team training** – Suggestive training for employees based on patterns, interests, career goals and other factors which would help the employee grow within the organization

A true retail cognitive enterprise should not only adopt technologies to enable improved and richer customer experiences, but also improved employee experiences. **Happy employees make happy customers.**
Employee Lifecycle

A typical employee lifecycle begins by attracting the right talent into an organization. With the advancement of technology and ready access to information, there are multiple methods for enabling a complete and seamless employee experience, with personalization.

Today’s talent expects their jobs to provide them with the same experience they enjoy in their day-to-day consumer and social space. In order to achieve this experience, every organization needs to engage with their employees continuously during their tenure at the organization, actively developing and growing them. This can be especially challenging in a fast-paced environment such as the retail industry with a high rate of turnover. Therefore, the need for employee engagement throughout the lifecycle of an employee is a requirement.

**Figure 2**
Typical employee lifecycle

83% of surveyed employees said they would participate in an employee listening program

Only 62% of baby boomers surveyed believe management will act on their input, compared to 78% of millennials

HR practitioners who use multiple listening methods rated their organizational performance and reputation 24% higher than those who do not

Source: IBM Institute for Business Value - Amplifying Employee Voice
Digital HCM

With IBM + Oracle

In order to address current technology trends and challenges specifically in the fast-paced retail industry, HR should not be viewed as a back office support function. Instead the Human Resource function should be viewed as a critical component to any successful business. Closely managing employee’s lifecycle by utilizing smarter HR technologies is one of the steps to becoming a Cognitive Enterprise. The table below lists IBM and Oracle HCM technologies which are designed to work cohesively as one integrated solution. These solutions address current trends — become a millennial friendly organization, facilitate collaboration via a social HR platform, utilize chatbots and other intelligent modes of self-service—all this while maintaining a rich employee experience.

<table>
<thead>
<tr>
<th>Attract</th>
<th>Hire</th>
<th>Engage</th>
<th>Retain</th>
<th>Develop</th>
<th>Grow</th>
<th>Serve</th>
</tr>
</thead>
<tbody>
<tr>
<td>IBM</td>
<td>Watson Candidate Assistant Adverse Impact Analytics (AIA)</td>
<td>Watson Recruitment</td>
<td>Shift Rostering</td>
<td>Your Learning Skills Inference</td>
<td>Watson Career Coach</td>
<td>Chatbots</td>
</tr>
<tr>
<td>ORACLE</td>
<td>Oracle’s Talent Acquisition Solution (ORC (Fusion) and OTAC (Taleo))</td>
<td>Global Human Resources</td>
<td>Talent profile Goal management Performance management</td>
<td>Workforce Predictions</td>
<td>Learning Management</td>
<td>Career and Succession Planning</td>
</tr>
</tbody>
</table>
Consumer-grade expectations. Employees and job applicants have new expectations because of their rich digital experiences outside of work. They express themselves and connect on social media; the world is searchable and transparent; their questions can be answered 24x7 in a live chat. And then they come to work. Our job in HR is to create that connected, transparent, mobile, personalized, searchable and 24x7 universe through our workplace and our tools. It means investing in new technology and reinventing all our processes through the lens of the employee.

Ready access to artificial intelligence and deep learning is creating the opportunity to spot patterns and predict outcomes. This improves our decision support capability and workforce management — whether it is to select candidates who will be more successful, match an employee to job openings or infer an employee’s skills from her digital footprint. We also can use bots to improve our productivity — for example, our analysis tells us that last week we saved 500 hours of Q&A time by training a Watson AI powered bot that answered more than 10,000 questions.

Skills obsolescence. Companies are being massively disrupted by technology and they have a desperate need for their employees to reskill themselves for the digital age.
of executives struggle to keep workforce skills current and relevant in the face of rapid technological advancement.\(^1\)

### HCM Challenges in the Retail Industry

With the accelerated technological, social and regulatory transformation, the Retail industry is faced with the following challenges in managing and retaining its workforce:

#### Talent Acquisition
- Ability to acquire talent to support the retail store’s seasonal demand in a timely manner with the least administrative overhead

#### Labor Law Compliance
- Assurance to meet the fair hiring practices and labor laws around the world, along with proven screening and assessment capabilities
- For smaller retailers which cannot support having an HR Manager at each store, Store Managers typically don’t have the necessary training or experience to make qualitative decisions. They often lack the required knowledge of labor, payroll and tax laws to be compliant

#### On-boarding
- Effectively onboard seasonal workers using automated new hire on-boarding and on-the-job training
- Multiple onboarding processes for regular employees and seasonal employees

#### Work Scheduling
- Effective work scheduling capability to meet retail’s flexible work schedule needs, resulting in lower labor cost and higher profit
- Complex work scheduling based on employee availability, pay rate, skills with fluctuating business demand
- Lack of availability to technology when mobile and kiosk enabled capabilities are expected. Not all retail workers have real-time access to desktop applications to manage shift schedules changes, record time and view paycheck information

#### Employee Experience, Engagement and Talent Management
- High expectations in self-service capability including use of mobile capabilities, collaborative tools and clear career path guidance
- Clear definition of corporate objectives and goals cascaded throughout the organization results in improved employee engagement
- Career Development and Talent Review should be discussed and conducted throughout the tenure of an employee to promote aspirations, provide feedback and retain talent

#### Learning & Compliance
- New hire training to support the seasonal / part time workers
- Compliance tracking to assure licenses and certification completion
- Renewal of certifications and re-training performed without administrative overhead

#### Predictive Analytics
- Forward-looking insight into workforce trends in order to take action early, reduce attrition rates and align human capital plans with business objectives
The Cognitive Enterprise for HCM in Retail

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90% of recruiters believe the labor market is candidate-driven

— MRI Network Recruiter Sentiment Study with insights from employers and candidates, June 2017

Talent Acquisition

— Ability to acquire talent to support the retail store’s seasonal demand in a timely manner with the least administrative overhead

High rate of turnover, voluntary and involuntary attrition, high volume hourly employees and a predominantly millennial workforce. These are some of the most common challenges faced by our retail clients.

In order to keep up with the fast-paced nature of the retail industry, traditional HCM applications and methods are inadequate and highly limiting. Volume and speed have necessitated the inclusion of AI, chatbots and other cognitive methods to become part of the retail Human Capital Management ecosystem.

Hiring the right talent quickly saves money and increases revenue and profits. IBM and Oracle have specific AI and cognitive solutions to address this need.
IBM Watson® Recruitment (IWR) is an AI-powered talent management solution that works seamlessly with your Applicant Tracking System (ATS) to increase recruiter efficiency. It surfaces the most qualified candidates for the job — without human bias — and identifies adverse impact. IWR focuses on skills and experiences. It does not take into account things such as a candidate’s name, which human recruiters and hiring managers are likely to use to infer gender, ethnicity and other potential conscious or unconscious identifiers.

IBM Watson® Talent Match

With IBM Watson Talent Match, you can look beyond keywords to evaluate important intangibles — such as indirect skills — that are not explicitly specified on a resume. Rigorous evaluation of unstructured information, job classification, competency, skills, behavioral traits, and more.

Watson Candidate Assistant wins:

- Ventana Research 2018 Digital Innovation Award
- Human Resource Executive Top HR Product 2018

Watson Recruitment generated 55% screening process efficiency gain according to recruiters.

64% more applicants from IBM Watson Candidate Assistant progress to in-person interviews

Learn more:
ibm.com/case-studies/buzzfeed
Flexible Choice

IBM Watson Candidate Assistant, IBM Watson Recruitment, and IBM Watson Talent Match can integrate with existing Oracle Taleo customers without requiring them to purchase any other Oracle products – such as Oracle HCM Cloud.

Oracle Talent Acquisition Cloud (OTAC)

Oracle HCM Cloud offers multiple options for talent acquisition including Oracle Recruiting Cloud (ORC) and Oracle Talent Acquisition Cloud (OTAC). ORC is a new recruiting and candidate relationship management solution delivered natively as part of the Oracle HCM Cloud suite. It enables employers to track and measure complete information about their talent across the HR spectrum. It keeps the candidate experience at the center of the recruiting process by leveraging innovative technologies such as chatbots, and a modern and mobile-friendly User Experience (UX). A key differentiator with ORC is the seamless integration with key onboarding processes that are part of the HCM Cloud suite of services.

- **Multichannel sourcing** of talent by integrating with job boards and social networks such as LinkedIn.
- **Customer branded** career portal/site with the ability to incorporate media support for video, audio and other forms.
- **Interview scheduling** ability for a candidate to select an interview time slot made available by the recruiting team.
- **Additional information request** from candidates after the initial application has been submitted.
- **Automated candidate selection** facilitates a candidate to automatically move forward in a selection process if certain criteria are met in their current status.
Labor Law Compliance

- Assurance to meet the fair hiring practices and labor laws around the world, along with proven screening and assessment capabilities.
- For smaller retailers which cannot support having an HR Manager at each store, Store Managers typically don’t have the necessary training or experience to make qualitative decisions. They often lack the required knowledge of labor, payroll and tax laws to be compliant.

During the recruiting and onboarding processes, labor law compliance is mandatory. Smaller retailers cannot support having an HR professional at each store leaving hiring decisions to a Store Manager who often struggles to keep up with regulatory requirements. Better support is needed to guide managers through labor, payroll and tax law compliance.

Oracle Recruiting Cloud (ORC)

With ORC, you can easily and consistently track candidates through the hiring process and meet the fair hiring practices and laws around the world such as Equal Employment Opportunity in the United States and local data privacy and employment laws in Europe and Asia.

Instant short list makes the job of screening candidates as easy as possible while simultaneously enabling high quality with advanced search, innovative quick filter technology, and proven screening and assessment capabilities.

Background checks are run on candidates as part of their candidate selection process to ensure their background is verified before hiring them. Third party integration capability to background check vendors with ORC is also available.
On-boarding

- Effectively onboard seasonal workers using automated new hire on-boarding and on-the-job training
- Multiple onboarding processes for regular employees and seasonal employees

The candidate experience, while starting during the recruitment process, continues through onboarding. The onboarding process is the candidate’s, now employee, first encounter with the organization’s business processes.

In the retail industry where turnover is high and speed to hire and onboard is a critical success factor for the business, an unpleasant onboarding experience can directly impact future hires — references, friends and family. Oracle’s onboarding platform automates your onboarding process by making it available online. Configurable onboarding portals help candidates quickly complete necessary documentation. These onboarding portals have the ability to host rich media content and integrated compliance and role-based training. All this, even before their first day on the job!

IBM Adverse Impact Analytics (AIA)

Adverse Impact Analytics (AIA) enables clients to observe areas of possible Adverse Impact within hiring models produced by IBM Watson Recruitment (IWR). Adverse Impact can either be “trained” with data used to train the system or it can develop over time as the system updates based on user biases.

Candidates talk regardless of candidate experience:

<table>
<thead>
<tr>
<th>Experience</th>
<th>Talked with friends and family</th>
<th>Don’t know</th>
<th>Did not talk with friends and family</th>
</tr>
</thead>
<tbody>
<tr>
<td>Satisfied</td>
<td>73%</td>
<td>5%</td>
<td>23%</td>
</tr>
<tr>
<td>Dissatisfied</td>
<td>65%</td>
<td>5%</td>
<td>32%</td>
</tr>
</tbody>
</table>

Source: WorkTrendsTM 2016 Global (Recent job applicants n=7,096)
Lack of an efficient way to manage the above has a direct impact on operations and contribute to the following management challenges:

1. Absence of a sophisticated scheduling tool, visibility on shift details, overtime opportunities, shift swap functionality
2. Inefficient scheduling, low employee utilization, higher labor cost and reduced employee morale
3. Managers’ spend more time on administrative work—shift planning, approvals, reporting
4. Minimal visibility on shift data of the employee, department and company which impacts planning, budgeting and business targets
5. Ineffective scheduling triggers compliance issues like the risk of not adhering to policies, labor laws and union rules
6. Limited and low utilization of modern technology and real-time data for self-service and administrative tasks

IBM Shift Rostering

IBM’s Shift Rostering solution, built on Oracle Platform as a Service (PaaS) and mobile platform powered by IBM Watson®, is fully integrated with the Oracle HCM Cloud SaaS solution. IBM has invested to develop this supplemental solution to further enhance the already delivered functionality in the Oracle HCM Cloud product. Our solution is designed for payer and provider organizations of all sizes and business models and incorporates chatbots for both managers and employees, while offering a personalized employee experience.
IBM’s Shift Rostering solution includes:

A. Enables employees and managers to “swap” shifts once they have been scheduled
B. Bot-enabled user interface is conversational, for example, “What shift do I work on Thursday?” or “Can I swap my shift?”
C. Integration with Oracle HCM Cloud to retrieve employees’ personal data and work schedule data
D. Integration with Oracle HCM Cloud to update employee shift changes after shift swap

IBM’s Shift Rostering solution is time efficient and user-friendly, providing the user with a convenient and intuitive way of creating and swapping schedules quickly using natural language. The solution is ideal for retailers that experience business stress during peak sales periods such as holidays, weekends, special sales or events. Store Managers do not need to spend time accommodating work schedule changes from part-time and seasonal employees.
The Resolution Foundation thinktank study shows that 60% of the retail workers are under the age of 30.

Employee Experience, Engagement and Talent Management

- High expectations in self-service capability including use of mobile capabilities, collaborative tools and clear career path guidance
- Clear definition of corporate objectives and goals cascaded throughout the organization results in improved employee engagement
- Career Development and Talent Review should be discussed and conducted throughout the tenure of an employee to promote aspirations, provide feedback and retain talent

The high percentage of millennials and Gen Y retail workers means modern HR user experience is critical. The ability to access real time HR related information for the employees and staff members in a user-friendly interface and readily available to use anywhere and anytime is essential.

Oracle HCM Mobile

Many of the retail staff members are not equipped with a laptop or office space. Oracle Human Capital Management Cloud using the Oracle HCM Mobile Platform allows useful features available in the mobile app including:

- **Learning:** Employees can view learning assignments offline
- **My Day:** Employees can view events scheduled for the day
- **Talent Profile:** Employees can view skills and qualifications
- **Goals:** Employees can track goals on the go
- **Pay:** Employees can view and download their pay slip PDF
- **Absences:** Employees can view planned absences and available balances
- **Time:** Employees can view time cards

IBM Watson® Career Coach

Supplementing the delivered Oracle functionality is IBM’s Watson® Career Coach. A virtual assistant that aligns your business goals with your employees’ career aspirations. Watson Career Coach learns about an employee’s preferences and interests and makes recommendations for job roles based on their current role, skills and career moves others have made from this role. Watson serves as a personalized development coach and recommends learnings to close skill gaps to their preferred role. Internal mobility is encouraged by notifying employees of internal opportunities that are consistent with their career objectives.
of millennials think professional development opportunities are one of the most important elements of company culture.²

Watson Career Coach

Choose best-fit roles and apply directly
Explore career options and plan next steps
Seek answers to career-related questions

Job Opportunity Match

Employees can find open job positions deemed a good fit for them, by answering a set of skills-based questions or uploading their resume. Using IBM Watson APIs, Career Coach matches users to internal job opportunities that are relevant to their current career experiences. Users can refine their search using location filter and apply directly from Watson Career Coach to initiate their next professional move.

Choose best-fit roles and apply directly
Career Navigator

Employees can define a personalized career progression and receive guidance based on job transitions of others in similar positions and roles. Career Coach makes recommendations for each next step with multiple job role choices with ratings for each based on organizational demand and skill match. It prepares employees for selected career growth, with relevant upskilling suggestions. Users can modify, at their own pace, their selected career plans, as needs or desires change.

Personal Career Advisor

*Myca (My Career Advisor)* is the mobile chatbot that employees can engage with anywhere, anytime. It interviews users, understands their needs, and provides instant, personalized career advice to the most commonly asked career-related questions. Powered by IBM Watson, Myca supports 40+ career-specific questions as well as general out-of-the-box ‘chit-chat’ queries. This cognitive-bot learns from user feedback on its answers and additional comments, to personalize and refine its future responses.

Cognitive chatbot, “Goldie” was deployed to more than 250,000 staff members. Powered by IBM® Watson™, this solution resulted in unparalleled employee engagement, rapid return on investment and substantial annual savings.

Learn more: ibm.biz/goldiekeynote
Learners can discover and consume learning that is relevant to their job roles. Subject matter experts can easily share their knowledge with the rest of the organization and gain recognition for their contributions. In retail, immediate ramp up of store staff is critical to increase productivity - upon onboarding, managers can push learning to their staff members and track the teams progress.

HR specialists can manage the learning catalog and drive compliance needs by administering required learning across the organization. Learning specialists can assemble online offerings, courses, and specializations using videos and SCORM-compliant content.

HR specialists can set up certification compliance with complex assignment rules around expiration and renewal.

In retail, it is critical for staff members to keep their license and certifications up to date for compliance. Automation and Assurance of Compliance Training is available in Oracle Learning Cloud.
Predict Worker and Team Attrition

Leverage 9-box view of your workforce to identify “at risk” top performers and focus on taking steps to retain them.

Improve Performance and Reduce Attrition through “What If” Modeling

Model different scenarios to see how changes in policies, vacation, pay or promotions can affect your organization.

Oracle HCM Workforce Predictions

Oracle HCM **Workforce Predictions** provides forward-looking insight into your workforce trends and enables you to take action early, aligning human capital plans with organizational business objectives.

Predictions uses current and historical indicators to predict performance and attrition, determines corrective action through “what if” scenario modeling and provides the ability to implement that corrective action. Several factors are taken into account while constructing the “what if” scenarios such as historical and current employee performance, their compensation history, vacation and time off patterns.

**Predict Worker and Team Performance**

Insights regarding how a worker may perform in a new role, given their current skills and experience.
Convergence of technological innovation, social and regulatory transformations has made Retail Industry a dynamic market place. To keep up with the disruption, the emergence of the Cognitive Enterprise is inevitable. The ability to manage the needs of your workforce from recruitment and learning to retention is paramount to the success of the enterprise. The opportunity to harness Oracle’s vertically integrated HCM Cloud with IBM’s Cognitive capabilities has the potential to accelerate industry transformation into intelligent automation.

To learn more or to request a demo of IBM’s Oracle HCM Cloud capabilities with Cognitive Solutions for the Retail industry, please reach out to your IBM client executive.
Client Case Study

“The combination of Oracle HCM Cloud and IBM Global Business Services contributes directly to our ongoing recovery and growth.”

– Ioannis Boutaris, HR Technology Manager, Co-operative Group Limited

Co-Operative Group Limited

Problem
The Co-op is on a journey to empower its colleagues to serve its members and customers better. Part of the transformation is to standardize and create easier HR processes based on Oracle HCM Cloud solutions, implemented by IBM® Services.

Requirements
– Streamline operations and reduce costs
– Consolidate inconsistent and duplicated systems and processes caused by multiple acquisitions
– Unify and “rebuild” the business

Solution
– Oracle Human Capital Management (HCM) Cloud
– Oracle Talent Management Cloud
– Oracle Payroll Cloud

Results
– Standardized company-wide HR processes which will make it easier for “teams” to manage issues
– Frees up valuable time for colleagues to spend with customers and members
– Cuts costs with streamlined processes and by refocusing the HR operating model
– Payroll processed for over 90,000 users
– 40% reduction in payrolls and 50% reduction in pay codes
– 76% reduction in compensation cycle run time
– 28% reduction in HR operating costs
– 100% customizations removed
– Executive talent review process reduced from 6 months down to 2 months
– Online pay slips increased from 30% to 50%

Learn more
ibm.biz/coopcasestudy
IBM is one of Oracle’s largest and most experienced systems integration partners jointly helping customers for over 33 years:

- Platinum and Cloud Elite status
- Preferred partner of choice for BPO for Oracle Payroll Cloud and Oracle HCM Cloud
  [ibm.biz/preferredBPOpayrollpartner](http://ibm.biz/preferredBPOpayrollpartner)
- 500+ dedicated Oracle HCM Cloud consultants
- 70+ Oracle HCM Cloud go-lives
- 70+ Oracle specializations
- 450+ Oracle HCM Cloud certifications
- 200+ Oracle Cloud go-lives
- 9 Oracle HCM Cloud Excellence Implementer (CEI) modules
- 10+ Oracle-specific delivery centers
- Oracle Cloud Garage

[ibm.biz/oraclewave2018](http://ibm.biz/oraclewave2018)
Read IBM Thought Leadership on Oracle’s HCM Blog

ERP/EPM and HCM Together: Why Tackle Them at Once? ibm.biz/multipillarcloud2

Global Legal Firm Embraces Diversity — and Drives Efficiency — with HCM Cloud Platform ibm.biz/hcmclouddiversity

Read about IBM’s Oracle HCM Cloud clients

IBM's Oracle HCM Cloud client look book ibm.biz/oraclehcmlookbook

Learn more about IBM Services for Oracle ibm.biz/IBMOracle

Visit IBM’s page on the Oracle Cloud Marketplace ibm.biz/IBMoraclecloudmarketplace
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IBM Institute for Business Value
Facing the Storm, Navigating the global skills crisis

2017 Hiring Outlook

Source: McKinsey Institute

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