

# How EVERSANA masters M&A with an agile workforce OS

## Lauren Gardner:

Okay. Welcome everybody. I see some people trickling in. Good morning, good afternoon, and good evening from wherever you are. Hello. Hello, hello. And if you could just put in the chat where you are coming from. I know we have a global audience today. I'd love to see some interesting places. Brazil, Nigeria, Nigeria is a good one. We love that. Berlin. Hello Grace. Hello, we have Bangalore, India. I am calling in from New York City. Hello, South Africa. Hello, Nina and Barcelona, Philippines. Oh my gosh. Hi, Heather from Canada. Hello. Okay, we'll get started in just one minute here.

If you haven't put where you are dropping in from the chat, feel free to let us know. We'll start in one minute. So go ahead and get your water if you need. Refill your coffee. Okay, so let's go ahead and get started. I want to introduce myself. My name is Lauren Gardner. I'm your host for today. As you can see on my background at glo, we are celebrating Skills Tober. We are doing skills everything this month, so feel free to go to [gloat.com/resources](https://gloat.com/resources) to win a little bit more. But without further ado, welcome to however Sauna is mastering m and a with an Agile workforce. We are joined by Heidi Brooks. Heidi, just so you guys know, has done this webinar before and it is back by popular demand. We have some new information also from her rollout that we will be able to share at the end.

So that's amazing and new and you'll get a lot of value from it. But a little bit more about Heidi. Heidi is the people development and learning lead at Ever Sauna. It's a growing company in life sciences and is differentiating itself through next-generation commercialization. Her team is focused on organizational development, talent development, leadership development and employee learning amongst 4,500 global employees. And prior to EVERSANA, Heidi spent 25 years in manufacturing as an OD and HR practitioner experiencing many different HR functions like talent acquisition, core, HR, organizational

development, corporate learning, launch planning, training at Ford, Harley Davidson, another local manufacturing company. So she's been at EVERSANA for over four years, I think closer to seven, and she's just really embraced life sciences. So without further ado, Heidi Brooks.

## Heidi Brookes:

Thank you, Lauren. That's awesome. I'm super excited to be here.

## Lauren Gardner:

Absolutely. Thank you so much for being here. Absolutely, and like I said, we are doing this webinar for a second time. We had so much demand for this and for this event, we catered it more actually to a time zone that was more European friendly, a little bit more APAC friendly. So I'd love to hear from you guys where specifically you are tuning in from. Is it North America, Europe, APAC or other? And you can go ahead and write your responses in the poll if you can see this on your screen. We have Europe, amazing, Europe, other, a little bit from North America. Amazing. We have a nice spread. Well, thank you all so much for being here. I'm going to share with you the results. Okay. I know you're all here to learn from Heidi and Evers Sauna. So let's kick it off. So Heidi, I know that m and a is a big part of EVERSANA'S business strategy. So tell us a little bit more about that and what challenges have come up because of it.

## Heidi Brookes:

Absolutely. Thanks Lauren for asking a question and thank you for letting me share more about Evers. It's a very cool company. Evers actually originated by bringing multiple specialty companies together and what they offered was a variety of services to help companies commercialize their products. And since 2019 I believe that we've added multiple other companies for a total of 17 and we continue every year to add more. So I was super excited to see that there are other companies adding one to three acquisitions or mergers a year because we're currently in that same space and excited to see what their experience has been as well. But our services are really mainly focused on creating offerings for pharma, biotech and then also med devices. And we partner with them to do anything from pre-launch to post-launch or bringing those products to market. Every acquisition we make is either getting

a deepening of those services or adding new services to that offering. Given our wide range of services, we can offer clients multiple, they can do singular services, they can do multiple services, or we can become their complete commercialization partner. And what that means is we do everything for them. And where that's really valuable is for a smaller company that may not have the resources to bring their own products to market. So really, really cool. And as you can imagine, this actually started with our CEO I think almost day one when I started.

He said to my boss, he goes, how do we look at our skills across the company? I'm like, okay, we haven't even brought the company together yet, but how are we going to do this? But it's an opportunity because we just didn't know how to tap into our talent. When you bring that many companies together?

In the beginning, it was probably about 1600 people and we were still working in silos. And so how do you find out where all of our talents are? How do you find out the new talent that we're bringing in? And then also how do we capitalize on those talents for pitch projects and then also services that we offer. And that's really the impetus of it. Some of the other things that we were experiencing is managers didn't know how to talk to their employees about their career path at Evers because it was so new. It's just, they're like, I don't even know what some of those other services do, so how can I even talk to them about what happens? And then as you can imagine, the other end of that is employees couldn't see what their career path looked like at Evers. So those are some of the business things that were happening for us from the very early days.

## Lauren Gardner:

Yeah, for sure. So you were trying to tackle employee development and career development. So how did you decide you were going to pursue a technology for this and then with today's busy market, there's so many technologies out there, how did you decide what kind of technology you were going to pursue?

## Heidi Brookes:

Great question. For us, it was trial and error. So we tried many other things before this. So we actually implemented, I believe in 2020, a new HCM system. And there was an opportunity in the HCM system to add skills, certification licenses and all of that. We had probably about a 1% take rate as you can imagine, because you had to actually put the skills in first. And so that was a challenge. How would we possibly know all of the skills, all of the certification, all of the licenses. From there we kind of migrated to working with some of our specialty areas like IT and consulting and just really focusing on skills inventory and that's what they called it. So they created the inventory of the skills that they wanted to look at or have people tell them what skills they had.

And again, we could still do that in our HCM, but it was a static process. And this is what I talked to my team about all the time. I said, it's information in, it was hard to get information out and you would have to ask people to update it all the time. And so it really wasn't valuable other than the one or two times a year that we asked them to put their stuff in. So that wasn't working for us. We knew it was probably just a stop gap, and so we just continued to look for opportunities to find other resources or other systems that could help us.

## Lauren Gardner:

And you were looking for a system that wasn't static? Tell me more about that.

## Heidi Brookes:

Well, so I'm sure I was on another webinar. I'm a big webinar person. I believe that you can always learn something and if I take one nugget away, I'm like, this was good. And so I was on a webinar and the concept, I think it might've even been Josh Berson or someone else, the concept of talent marketplace came up and I'm like, the light bulb went off and I'm like, that's what we need. And so I started exploring what was in the marketplace and we actually have a relationship with Gartner. And so we went to Gartner and said, okay, tell us who is leading, excuse me, leading in this space. And so we were able to partner with them and our IT folks, and they were able to give us their vision of who was leading in the space, what the opportunities were, and that's how we started the process.

**Lauren Gardner:**

Okay. And was there anything about the technology that you pursued that was more agile, more organic that you can touch base on a little bit?

**Heidi Brookes:**

So for us, it was easy for employees to upload and share information. Also we always talk about this in any business that I've been in, we've struggled with the same things. How do we put the employee in the driver's seat of their own career? We want employees to own their own development. And this gave them an opportunity to interact with the system, interact with all of the information in the system, and then explore other career opportunities that they may not even know about across the company. Some of the other things that it does for us is it breaks down the silos. So that issue that we have of, I don't know what this other business does, we have project managers across our business, and so what's to keep a person from moving from one business as a project manager into another business as a project manager, but they would never even know that that was there. So just that opportunity to break down those silos and explore those other career opportunities. And then I think the most important thing for me is instead of the employee interacting with a system to update their profile all the time, it's the employee interacting with the platform to gain new experiences, gain learning in relationship with what they want to build in terms of their skills and their development. And so they don't have to go in and add their profile, update their resume because the platform actually does it for them.

**Lauren Gardner:**

Absolutely. And I think a lot of people are resonating with the idea how do you engage people where they are? How do you give them autonomy over their career development, over their skillset that they want to develop? So hugely, I'm sure that resonates with this audience. Just as a quick reminder, if you have any questions, please drop them in the chat for Heidi. We will be going over them at the end of the session. And I know you have a lot of golden nuggets here, so that definitely resonates. In terms of an agile workforce, zooming out a little bit, what gave you the confidence that an agile workforce could help solve the business problems You

were initially trying to tackle?

## Heidi Brookes:

Many of the same things that we already talked about, putting the employee in their driver's seat, we knew that would help with retention because again, if you're sitting here and you don't know what the landscape looks like, you can't see your career at EVERSANA, how long are you going to stay with us? So it really was an opportunity for us to impact some of those normal business challenges that everybody has. Retention, also giving managers the tools to develop their employees. I think that's one of the things that I love most about the system and I can talk about how we've used it so far, as we're now giving managers better tools so that they can have more in-depth conversations. And one of the things that we've been talking about is most of the time when we hire people or we get a new team, we may not remember all of the cool things that they've done in their career, and it's a reminder of we can start to tap into people differently if we just know what they've done and what opportunities that they've had instead of just what they were hired for.

## Lauren Gardner:

Absolutely. And that visibility into what they've done before and what they add to your workforce and where they want to go, that's crucial. So how did you build the case internally for this approach?

## Heidi Brookes:

So great question because I think it was a couple of years in the making because again, I am lucky enough that our CEO made the request early on. So that was something that was in the back of my mind and I kept taking a run at it in different ways. Then we had the opportunity to have some of our stakeholders say, we want this as well, which was really great because we actually involved our stakeholders in the RFP process and the review of all of which is very, very different. And I had a little bit of pushback from some of our vendors and they're like, what do you mean your stakeholders are going to be in there? I said, these are our business

stakeholders. We want them part and parcel to the process, but we really focused on building that business case around retention.

We were losing a high amount of people in their first year of employment with EVERSANA so almost 50% because in most of the comments they just couldn't see their career path at EVERSANA. Then also we had engagement data about managers not making development a priority, and then the last piece was more anecdotal, but it was the same thing kept coming up again and again and again. How do I find people across the business one to partner with, to tap into for pitches, to tap into for projects? I don't have enough capacity on my team. How do I find somebody else? I know we have other people that do this, but I just don't know how to go about finding them because Outlook doesn't always help us. You can't search by somebody's experience and outlook. So that was threefold for us in terms of how we built that business case and we had real data around it, and I think that's very, very impactful for the business.

### **Lauren Gardner:**

Okay. Was it hard to get the other stakeholders involved in the process or were they

### **Heidi Brookes:**

No, they were full on in, so we had IT consulting and then we also had our data and analytics group and they were super excited to be part of the process and they were engaged the whole time, which was really helpful as well. And then as you can imagine, they then moved into being our change champions as well. And

### **Lauren Gardner:**

Isn't that helpful?

### **Heidi Brookes:**

It is, absolutely. It's

**Lauren Gardner:**

So, Heidi, this has been so interesting to get the background on how you got the buy-in the business challenges. I know you've, sorry, put together some slides that are more in depth. I think it's going to be very valuable for our audience. Perfect. Before we do that, I'm going to ask another question to the group. So this question is, this question is, okay, when it comes to m and a, what is the biggest HR business challenge that you face? Heidi has shared hers, a little bit of retention, some employee engagement skills, visibility a hundred percent. Tell us what it is for you. So definitely retention, skills, visibility, all of the above. Okay. Some more retention is still in the lead, but it seems like it's evenly spread across the board.

**Heidi Brookes:**

I can imagine we're all challenged with the same things without a doubt,

**Lauren Gardner:**

Same things. And Heidi, I'm going to go ahead and share your slides. One, thank you.

**Heidi Brookes:**

And I think for everybody here, the slides that we're going to share, were actually part of our business case in terms of what we shared with our leadership team to get the approval to move forward with this.

**Lauren Gardner:**

Okay, Heidi, take it away.

**Heidi Brookes:**

Wonderful. So just to start off, our platform is named Grow My Talent. Grow Talent is one of our original cultural beliefs. What's great about our cultural beliefs is when the companies came together, they had all of the leadership get in a room and identify what we wanted our culture to look like, and then we translated that into beliefs. So it's really great that we have

pulled that through to this platform. And the one thing that we added there was my word, my, and that's so employees know that they are empowered to own their own development, and we talked about how do we re-energize careers at EVERIANA? And so that's how we started our conversation with leadership.

So this is our history. You can click through this pretty quickly. I always talk about, we really came together in 2019, but the company started in 2016 with a smaller group of companies that came together under the Access group, and then in 2018 they started looking for larger acquisitions, which I think there were probably about three or four then. But as the company came together, they started to look at, okay, how do we start to build that foundation through technology, Salesforce obviously, so that we can be consistent around how we connect with our clients, what was our corporate branding? And that's how Evers came along. And then we started to really focus on that foundational back office integration. But then we started to look at, okay, we brought all these companies together, how do we expand our capabilities? And so just repackaging what those services were that we could offer to our clients and really start to talk to the marketplace around, we offer everything from pre to post, sorry, pre to post launch, but here's all of the services that you can choose from or you can have all of them.

Then we brought in talent from all over the marketplace, within the life sciences, pharma, biotech business. We have a new chairman, A C E O C F O C I O. All of our C-Suite comes from other companies that are in the same space. And then probably within a year, maybe less, we started to expand globally. We already had a presence in India, but then we started to expand in APAC in Europe probably in 2020. So it was in short order. And it's been a great opportunity for all of us to figure out what are those places that are needed most and where we can expand and have people that we can support clients around the globe. And then as you can see, we continue to acquire businesses. Those are a list of all the businesses that we've acquired and we continue, even to this day, I am sure there's probably three in the mix right now. I always ask my boss, I'm like, okay, so what's coming? He's like, just always be prepared for something. Sometimes they're smaller companies, sometimes they can be 10 people. We had a recent acquisition that was probably 40% of our size, and so they're all different sizes. So we continue to work on building those out.

And again, we're here to just be that commercialization partner, and that's really who we are. Employees are about 4,500 and we have 650 life science clients around the world. So these

were our business challenges. I'm not going to read all of this slide, but I talked about the skills of visibility already. Our retention, our number one reason people couldn't see their career at Evers. And then again, employee development, less than two thirds of our employees agree that managers make development a priority. It says 2022 global employee Voice survey, but it did not move between 2022 to 2023. And we do our survey every year. The most important for the business to understand is the impact of not addressing these issues. So we know what the impact is, and we took some very low data here. So we were assuming a hundred employees at 50% of their \$60,000 annual salary. That impact is 3 million of having to replace them. But I think what we had to tell people is the 5.4 below was really additive. It's three plus 5.4, not the other way around. And that's really the impact of the business due to loss productivity and having those roles open. So this isn't something that we could ignore.

### **Lauren Gardner:**

Is this something that you presented to the business while building your use case or something that you found afterward?

### **Heidi Brookes:**

So both. I didn't find it afterward, no. This was my business case actually to get the approval to move forward.

Awesome. So as you can imagine, then this slide really just talks about, again, what are our needs for searchable data to identify skills. And one of the things that Gloat taught me, which I really love, and I talk about it all the time, because in the US there's this major focus on DE and I. And what I love about this is we don't talk about it in those terms, but we talk about democratizing opportunities and that's making these opportunities available to anyone and it's based on their skills. And so we talk about it doesn't matter what you do, if you have an open position and you're looking internally to fill that position, you only go to the people that you know that have those skills. Same thing with succession. What this platform does for us is it allows us to look across the organization and uncover other people that may have the same skills and the same experiences that we didn't even know about.

And so we're now expanding our bench and being able to uncover additional benches across. So again, our solution was exactly what we talked about, our platform of gloat, but then really focusing on how we will expand the workforce because it's not just about uncovering their skills, it's about how do we continue to develop them. We always get questions around, Hey, do we have a formal mentoring program? What this does for us is we don't have to have a formal program. We can connect people across the organization, which we could never do before, but then also having those full-time positions pop up in the system. If you are in a place where you're looking for your next step, maybe that position is currently open and you didn't know it because not everybody's out on the careers website every day. And then that last place is just what are those development opportunities and how can you and your manager have better conversations about them? I'm not going to go through the list of benefits. Sure. Many of you are all thinking the same thing or understand them, but we really, one of the last things that we hit on for the organization was we have a high propensity to go outside to hire contractors to do things. And so this is an opportunity for us to uncover hitted capacity. We may have the talent internally and they may have the capacity to help us versus having to go outside to pay for a contract to hire.

And again, this is really around helping the organization understand that we do have a strategy for talent. We want to enable the business, but we want to enable them, excuse me, by aligning business and talent needs. So we're going to do that through an existing talent base by identifying, leveraging those skills. And on the right hand side, you can see very easily empowering those employees to own their own careers and enabling managers to develop their teams. And this really resonated with a lot of people because they could really see what the power of the platform is and the things that we were addressing through it. And so a lot of people enjoyed this conversation. Next slide. Thank you. Sorry.

**Lauren Gardner:**

Of course.

## Heidi Brookes:

And as you can imagine, any business wants to know the financial money that we're going to be saving them. So we put that here. And this is always an interesting thing because many of the things that we talk about are all connected. So we know that employee development drives employee engagement, employee engagement drives client delight, and this was a way for us to start helping them understand that by addressing skills, visibility, retention, and employee development or employee engagement, we were going to raise the bar on client delight, but then there was also a financial impact to that. Looks like somebody can't see the slides.

## Lauren Gardner:

Oh, so sorry.

## Heidi Brookes:

Good. Awesome. Thank you. So this was really just the last slide to show everybody what the platform would look like. And again, focusing on the empowerment, enabling, and then growing EVERSANA through our most valuable asset, our people. And then I believe the next slide is our launch plan. So we actually kicked off the process in January. Phase one was a pilot, and we were focusing on those early adopters. So I talked about including our business stakeholders in the whole process, the RFP, the selection of the vendor, and then they became our pilot population as well. So we just kind of pulled them through with us, which was really valuable. They became very pivotal in being megaphones for us within their organizations, but then also helping us get people engaged with the system for the pilot. And then we actually launched August 7th with the rest of the organization, and I can talk about that next.

And then phase two and phase three, we're starting to talk about how do we continue to engage people with the platform? And the best way to do that is I love the skillstoberfest because we're going to use something so similar. Gloat is really, really good about giving ideas on how to not only communicate to the organization, but then how to continue to engage the organization. So we've had really good success with many of the recommendations that

they've made. So they've been a great partner to us. But then also we're just figuring out what we do next? Do we do learning? Do we do career pathways? Do we do the positions? So we're currently working, we just piloted and enrolled everything out with the profiles, the mentoring and the projects, and then also the manager's views of the team. Go ahead.

### **Lauren Gardner:**

Oh, sorry. I was going to say, I know you have some amazing details about your rollout. Maybe we save those for a moment and Perfect. Perfect. And maybe deep dive a little bit into, you talked about mentoring projects. Talk to us about how you designed your rollout strategy, and I'll stop screen sharing and just have you speak.

### **Heidi Brookes:**

So I think it was an evolution, right? So we learned a lot along the way. Again, I'll just hats off to gloat because they are part and parcel to, they have Evan's role, I should know this, right, because I think it was change management. He partnered with us every week, what are you doing? What are you focused on? And that was really, really helpful. And the other thing I can say is he had a lot of tools that he shared with us around you don't have to recreate everything, take what we have it for your organization and make it beneficial in terms of how you're going to roll this out. What we found along the way is we had a couple of stops and starts because it was on us. Because as you can imagine, we grew so fast, we didn't have some of the infrastructure in place. So a couple times we had to take a step back and put the infrastructure so that the data could feed the platform in the way that it was intended. So we'll continue to work through that piece, but that's why we had a little bit of a stop and start. But in terms of our organization, we're big on pilots. So we knew that pilot was always going to be the first opportunity for us to get people engaged.

### **Lauren Gardner:**

Makes total sense. Should we tell them how your rollout is going?

## Heidi Brookes:

Sure, sure.

## Lauren Gardner:

I'm going to go back and I'm going to screen share. Awesome. Is exciting. Again, audience, this is new, right? This just happened between the last time that we spoke on this webinar. So you are getting secret, secret, amazing results. So give me just one second.

## Heidi Brookes:

Absolutely. And I'll just start by saying I think our pilot was still small from Gloats perspective, but given the size of the organization and what we were doing, we rolled it out to 300 people and we had 181 people actually get in and start engaging with the platform. You can see here we had the C E O actually introduced this on August 7th. And between August 7th and just last Friday, we have 1100, almost 1200 active users in Grow My Talent in six weeks. So we are astounded by people engaging with the platform. We're not all the way there. We would love to have more, but we continue to focus on how can we get more people in the system. We actually had 1200 people go through the training. I have to give a shout out to my team, Molly Williams and Jordan dewitt because they were amazing and they did all of the training and the training development and it really was impactful.

And we continue to focus on how can we engage new hires at EVERSANA as soon as they walk in the door? How do we get them in the system? Because I think that's really great for a new hire to see. And we've actually had those comments from new hires that we've never seen anything like this. So they were super excited about that. As you can see here, this is really centered around our communication plan. We have an intranet, we had banners on our internet. We sent out emails, we had feature stories, we have resource pages that are amazing. Again, shout out to my team. They created those and then we had a CEO. What you can't see here is really cool because they introduced Grow My talent. Excuse me. It's a little animated thing that says grow talent first because that's our cultural belief. And the little orange ever sauna swoops up and becomes the my talent, which is really cool. So I'll have to find a way to share that with everybody. But this is what, this was our rollout plan. We had

1200 people go through training in less than a week. So it was a lot. And we covered multiple time zones. We typically, anytime we do something, we do one morning session, one afternoon session, and then one around this time in the morning to catch our global employees.

### **Lauren Gardner:**

That makes sense. You're engaging everybody.

### **Heidi Brookes:**

We are. We are. So we're super excited about the success so far. We've got great comments. We were most nervous about the projects. The project is the hardest thing for an organization for us just to get the concept a little bit, but then also be worried because a lot of our resources are billable. So there was a lot of conversation around this is discretionary time, this is over and above, and we're not talking about 20 hours a week, we're talking about one to two hours a week, and we have had some people get out there on the leading edge and put some really cool projects in. So we've had good success with that. So we just want to continue to build out the projects and the mentoring and continue to focus on those for the next month or two.

### **Lauren Gardner:**

You said that there's some cool projects that you've already seen posted. Are you able to share a little bit about what those projects might be?

### **Heidi Brookes:**

So one of 'em I started, but somebody else took over. We're actually doing an onboarding project to increase our employee experience for new hires. We had 20 people apply for the project, which is huge. Really huge. Just launched. We did, we just launched. But I think sometimes as organizations, we forget that people are willing to do extra if it means that they can continue to grow and develop and get involved in something that's not their normal day-to-day job. And so we're really giving them that opportunity. They get to meet people that they haven't met across the organization, they get to do and think about something

differently. And this one specifically, they're actually impacting what we do at ANA overall, and it's been great. It's been really great and we've got great feedback.

### **Lauren Gardner:**

Absolutely. And I know that engaging employees and having autonomy over their career development is number one right now for the employee experience. You just need to give people the opportunity to pursue what they're Absolutely. And they will 2020 people applied for that role. I mean, do you have any other interesting roles or positions that have come up? I was

### **Heidi Brookes:**

Going to look 'em up before. There was one that I was like, oh, that's really cool, and I can't remember what it was. I can probably send it later, but it came out of nowhere and I was like, I didn't even know we had that. It was one of those. So my team is learning too about all the different parts of the organization as people are posting projects and reaching out to be mentors. So it's been a great opportunity for many people. We did incentivize people with projects just by giving them some swag, but I don't think that that's the reason that they did it. Most of them, I believe we're looking just to engage other people across the organization.

### **Lauren Gardner:**

Absolutely. I mean, swag is great. I mean a darling perk, but it's not the end all be all. It's really having access to other parts of the business and getting to upskill yourself.

### **Heidi Brookes:**

Absolutely. Absolutely.

### **Lauren Gardner:**

Especially when people want to connect so much. Now everybody wants more connection. Agreed. Yeah. So I'm going to share a quick poll. We have talked about the agile transformation. We've talked about the benefits that Heidi has seen, and we want to know

from you, why is your organization interested in pursuing an agile organization? So because of building future fit skills, are you looking to meet business needs, adapt to market changes or like Heidi's talking about transform the employee experience and employee engagement. It looks like an even spread, interestingly enough, but building future fit skills is up there. Heidi, can you see the results here as they go?

### **Heidi Brookes:**

I can't.

### **Lauren Gardner:**

Okay. It might be after I publish them.

### **Heidi Brookes:**

I think so. Excuse me.

### **Lauren Gardner:**

No, it's okay. Future fit skills is still in the lead. Next is speed to meet business needs is another response we're getting a lot from. Okay, maybe just three more seconds and then I'm going to publish it for the group. Okay,

### **Heidi Brookes:**

Awesome.

### **Lauren Gardner:**

Builds future fit skills. So we're all looking towards a skills-based organization. I know that's a super hot topic right now. And also the market keeps changing, keeps changing. It feels like every four months we have something new. So that's also another reason why the majority of this audience is looking to pursue an agile organization.



## Heidi Brookes:

So one other thing that I didn't talk about, one of the things that came out of this that I'm not even sure if I considered or we were talking about it from the very beginning, this also helped us replace some manual components of our talent development review process. So we still have a talent development review process, but there were a lot of forms a manager had to fill out and things that employees had to do, and then we had to bring it to form where we talk about our employees, which it's a great process and we love it. It's just a lot, not only for hr, but also for our team to manage. What this did for us is it created an opportunity for the employees to create their profiles. Then they pull up their own profile, walk their manager through it, and then the manager presents in the meeting by opening up their profile and sharing their profile. Because the profiles are so great because it talks about what do I currently have in terms of my skills, what skills do I want to build? What are the next roles that I aspire to? And then what does that development look like? And so it was such a simple way I couldn't explain. We piloted it with HR and it was fabulous, and everybody loved it because they didn't have to deal with all the forms and everything was just in one central place. So it's been a great experience.

## Lauren Gardner:

Employee literally pulls up their own profile, walks through what they want for their development, where they're looking to go, does the review easy?

## Heidi Brookes:

It was it, and it cut down our time and the investment that we all had to make, but we still had those robust development conversations with our employees.

## Lauren Gardner:

Oh my gosh, it's game-changing. It's like it should have been like that all along.

**Heidi Brookes:**

We wish, right? I mean, we're all looking to do the same things, which is to automate those highly manual processes that we know are valuable.

**Lauren Gardner:**

Absolutely. So we have a lot of questions, Heidi, that are coming in. Perfect. I want to be cognizant of that. Awesome. But just before we get their last question, we saw in the poll earlier, there's a lot of people who are going through M and as. They're trying to figure out what skills do they have in their organization? How can we move quicker? Give some advice to the audience here. General advice for people going through mergers and acquisitions. What would you tell them?

**Heidi Brookes:**

Yeah, so in terms of this platform and just anything that you're doing in this space, I would say focus on progress, not perfection, because nothing's ever going to be perfect. It doesn't matter what we roll out or what we try. Again, I would highly suggest piloting because when you pilot, then you can work out the kinks in advance, and then you have all of the questions that people answer. So when you go out more broadly, you can address many of those things upfront. The other thing is to understand the needs. You really understand the needs because that will guide your narrative. Find that data that supports what you want to accomplish and how you can use it. And then really dig into the platform capabilities. You want to understand it so that you can easily link those capabilities to the business needs. And then the last thing is, I was really lucky, and I talk about this all the time, you have to have that executive sponsor. We all know that change management is hard enough when you don't have an executive sponsor or just, I use the term pushing rope, which we know what happens. You just continue to push it and go all different ways. Have that executive sponsor who will be that megaphone for you, because once they're on board, everybody else will get on board as well.

**Lauren Gardner:**

I know you touched on this a little bit, but if you didn't have that already, the executive sponsorship, how would you recommend building it? I know your slides kind of alluded to this a little bit.

### **Heidi Brookes:**

So again, I did it both ways. I knew I had the executive sponsor, but I wanted to build that kind of organic sponsorship within the businesses. So having those businesses also become that megaphone and those change agents or change champions was really helpful to us as well, because we could show the impact and we were purposeful about the businesses that we chose because between DNAIT and consulting, they had some shared skills that they were looking at and they had some shared capabilities that they were building. And so we thought that having those three when they got into the system, they would start to reach out to others across the organization. Yeah,

### **Lauren Gardner:**

It sounds like they were all rallying behind the same. They were. Okay, so Heidi, let's hop into q and a. Perfect.

### **Heidi Brookes:**

Awesome.

### **Lauren Gardner:**

So I can see Heather, Glenn, thank you so much for writing and it says we can answer live, so let's try answering live. What were the key aspects of your communication or project rollout that you really encouraged employees to get involved in?

### **Heidi Brookes:**

I'm trying to think because it's been a whirlwind the last month. So I think it was really, this was a platform for employees. It really became much easier for us when they attended the training. People got super excited about it. When we talked about the opportunities within the

system, we'd be more than happy to share everything that we did with everybody. We could share the communications, whatever's needed. I'm sure Molly could probably talk more about this, but it was really just that focus that this is for you, this is for employee development, and this is for you to continue to build your career at EVERSANA. And that was the main impetus of much of what we shared with the employees.

### **Lauren Gardner:**

Another question. A lot of these are about, it sounds like they're very impressed with your role at which they should be. More specific questions. What kind of training did you do for users to navigate the platform or for managers, et cetera, targeting each level for specific uses?

### **Heidi Brookes:**

Absolutely. So we've only done all employees yet. We have plans to do managers so that we can take advantage, advantage of my teams. We've done small pockets of my teams when we've had requests, but we did the standard, it's an hour virtual training where we just did the quick business case for everybody. And then we spent the balance of the time focusing on walking them through the platform. And what we encouraged everybody to do was to get into the platform and follow along so that they could create their profile at the same time as we were showing them to create the profile. So we found that worked really, really well. So everybody, and I'll be honest with you, as soon as they got in there, the platform is so easy. You really don't need the training because the platform actually walks you through the steps. And we told everybody that, and in the early days we actually had the C H R O and he's like, I just did. It took me eight minutes. And so that was again, something that helped us in terms of having those people that were really high up in the organization, but they're like, this is easy. If I can do it, you can do it. And I'll be honest with you, we even had the C O O. His profile is a four within the, so it's been an amazing, amazing experience for us.

### **Lauren Gardner:**

It's so great to see leadership using it and saying how easy it is. I mean, having a good UI doesn't hurt, don't get me wrong. I

**Heidi Brookes:**

Think

**Lauren Gardner:**

Some people say it reminds you of LinkedIn or whatever.

**Heidi Brookes:**

It's super simple. Yep, super simple. But I would suggest when you're going through the demo of the system, encourage people to do it along with you. We would send out the link in the chat, everybody would access it, and then they would do it along with us. We found that to be extremely helpful.

**Lauren Gardner:**

Absolutely. Just getting people on it and then once they're on, they can navigate

**Heidi Brookes:**

And then we're creating e-learning for new hires. So actually, my team is working through it now. It will actually, once you present, Hey, this is the place, it will pop them into the platform, let them do it, and then come back to the learning. So we have a couple. Yeah, so working on a couple different things.

**Lauren Gardner:**

Okay, next question. How did you argue that it was better to do this versus posting roles internally and proactively sharing? I



**Heidi Brookes:**

Don't know that we ever even had the conversation, right? So this fed that need for the skills piece so much that it was kind of a non-event for us, and we have not connected the positions yet. Once we do, I think that will be, it's twofold thing once you do the positions, because we have the capability then for our recruiters to search internally to field positions versus always having to go outside. Currently, we have no way for them to search internally for talent unless it's somebody that they already know where somebody's applying. So that's what we're really looking forward to from that one, but it wasn't a question for us.

**Lauren Gardner:**

Okay. You mentioned you evaluated other technology options. What helped you hone in as gloat as the right partner?

**Heidi Brookes:**

So we went through our normal RFP process. We had three vendors that we, again, I think I shared that we met with Gartner, so they identified who was in that top rate quadrant. They have their magic quadrants and who was in that top right quadrant, and we had three vendors. GLO was one, and really what won with GLO was they all had similar capabilities, but it was the user experience. It was easy, it was simple. Some of the other ones just weren't as good. And so that's why we settled with GLO, and that was driven by our business stakeholders as well. Everybody was in violent agreement around the user experience.

**Lauren Gardner:**

The user experience. Yeah,

**Heidi Brookes:**

It was simple. It was easy, easy to understand. Yeah,

**Lauren Gardner:**

I understand.

## Heidi Brookes:

Go ahead. And that has proven itself out for us.

## Lauren Gardner:

I'm so glad to hear that. I know that some tools are meant for just really just once a year use, so it doesn't need to be as UI friendly. I think that was definitely one area that stands out. So the next question. Sure. How do you make sure this kind of platform fits the culture of the company and the employees' needs? Concrete examples include engineers that are all linked through professional networks, but don't really have any buy-in in any internal career tools. Does that make sense? I hope the last part makes sense. Maybe

## Heidi Brookes:

We Yeah. No, no, it's okay. I'll try to answer it to the best of my ability. So for us, we've always talked about development. So as you can tell, our cultural belief is to grow talent, and that's about me not only growing myself but then growing others. And so we continue to connect to that cultural belief by naming the platform after it, but then inserting my, it depends on the organization. We don't have engineers per se, but we have a lot of people in it. We've tried to make the platform easy enough and accessible enough for any population. So we are non-exempt there. So we have hourly, we have salary, we have multiple organizations. We just try to make it easy for them to understand, but then also access and encourage them on what the opportunities are.

## Lauren Gardner:

Somebody wrote in a question that they think in order to buy an ITM tool, they need to have a lot of employees. What's your perspective on this?



**Heidi Brookes:**

I don't know, because I have 4,500 employees, which I don't think is a lot. I know there are 10,000 other organizations. I think it's really just an investment. What is the company willing to invest? But I will agree with you. I struggled a little bit in the beginning because even as we were piloting, I'm like, there's only going to be so much capability with a population of 200, right? But if you have 200 or a thousand engineers and they're all the same, I think it's a valuable opportunity. I think it really just depends on what your growth plans are. Do you see the organization growing more, and then will this do exactly what you need it to do? So it's really just checking out the capabilities and knowing what you're looking for.

**Lauren Gardner:**

What is the next step in EVERSANA's journey after the rollout?

**Heidi Brookes:**

So we have multiple phases. So we've currently just done projects and mentoring. We're currently looking at how we are rolling out career pathing and positions. That was slotted for probably October, November. We're probably going to push it back until January because as you can imagine, November and December become open enrollment and year end reviews. So we don't want to overtax the organization. So we're going to move that until next year. And then we're also going to connect it to learning and what that means. We're currently in the process of partnering with an off the shelf content provider that will actually connect skills with micro learning that will actually show up and gloat. So we're super excited about that. So when somebody identifies a skill, they'll say, Hey, have you seen this? This is IS knowledge, right? It's about starting to build the knowledge and train people, but it's on demand training. And then we'll continue to build people through those experiences when they apply that learning.

**Lauren Gardner:**

Oh, that's so cool.

**Heidi Brookes:**

Yeah, we're super excited. That'll probably be the end of Q one, early Q two.

**Lauren Gardner:**

So much change for Everson as employees over the next, oh my gosh, whole employee. Absolutely. Such a fabulous example of rolling this out. You're so organized, so positive, and it's just all about the employee. So it's just,

**Heidi Brookes:**

Well, it's been a great experience for us.

**Lauren Gardner:**

I'm so glad to hear that. Okay, we have two more questions. We're coming up.

**Heidi Brookes:**

Absolutely.

**Lauren Gardner:**

What were your biggest learnings after the rollout? Did anything surprise you or surpass your expectations?

**Heidi Brookes:**

So, great question. We really did not believe that we were going to have so many people get in so quickly and get in and start engaging with the platform. So that was one of our learnings. We probably underestimated our organization a little bit. We thought it would be slower, but every week I was like, wow, because we track our stats every week and we report out to the C H R O, and I was like, this is much bigger than we thought it was going to be. Our learning is we have to continue to engage with the population to get more people in, so it's not just a one

and done. I think we knew that already, and we have plans, but we may need to shift those plans so that we can do some other things to really focus on projects and focus on mentoring and focus on people completing a more complete profile. But it's all been good. I don't know if there's anything that we learned per se. Here's the one thing that probably didn't go as well for us. Once we did the initial training, we did subsequent training on just projects and just mentoring, and we had very low attendance to those. So I think once people get in there, they really start playing around with it and they can figure it out on their own.

I don't know if there's a need for the additional stuff. So that's what we're currently talking about. How much of that would we need to do in the future for new employees?

### **Lauren Gardner:**

Yeah, they can navigate it on their own. They don't need that second level of,

### **Heidi Brookes:**

Yeah, I mean, we went from probably 800 people that attended, or 400 or 600 or whatever it was to 30.

### **Lauren Gardner:**

That's a huge difference,

### **Heidi Brookes:**

Which is a huge difference. But I mean, you always learn something with every rollout,

### **Lauren Gardner:**

Of course. Last question, one minute left. If your company is just entering the m and a experience, when would you recommend exploring a technology like this? Or how did you do it on a smaller scale? How would you do it on a smaller scale until you're big enough for something like this?



**Heidi Brookes:**

So, excuse me. We did the skills inventory. I'd be more than happy to share that with you. Again, it's not perfect, but it's a static process, but at least you can get an idea of what the organization's looking for in terms of what skills they want the people to have. I would say as you're smaller, I would probably try and do something more manual. Or if you have a system that can just house the data that you can run reports on, it's hard to say how big, right? I'm not sure if we had done this when we first started, whether it would've worked as well. I think now that we have more mass, I think this was probably the right time for us, so we're probably around 4,500 people. It just seemed to work out for us better.

**Lauren Gardner:**

Absolutely. Any last notes before we take off for the rest of everybody's evening and afternoon?

**Heidi Brookes:**

The only thing I'll say is, again, everybody's experience is going to be different. I think we're all struggling with the same things around retention skills. This has been a great platform for us. I would definitely encourage everybody to explore it and see what the opportunities are to fit with your organization.

**Lauren Gardner:**

Absolutely. Well, thank you so much, Heidi. It was a pleasure. Thank you. I hope everybody enjoyed seeing how Heidi's rollout went, and you can find this on demand in the next couple of weeks. Thank you, Heidi.

**Heidi Brookes:**

Thank you.