



Building compliant, competent and connected workforces

Building business resilience and operating flawlessly in a fast-changing world



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1 Become future-ready



Do you feel like your organization is always playing catch-up? That no matter how hard you try, you're always one step behind? You may invest in research and development to explore new business models or strategies that help you maintain relevance in your fast-changing environment, only to find that there are too many barriers when it comes to implementing your plans. Perhaps you can never get ahead of your organization's staff churn rate and are struggling to find employees with the right skills to replace those who are due to retire soon. Or, it may be that keeping up with the pace of regulatory change in your industry feels impossible.

If any of that sounds familiar, you're not alone. Implementing strategic change through to an operational level is notoriously hard. In fact, according to Gartner, only 8% of strategy leaders report a success rate of 90% or more on long-term strategic initiatives. So how can you transform your organization into something more adaptable, flexible, and agile? To gain the ability to make strategic plans happen faster? And operate flawlessly no matter how fast the world changes?

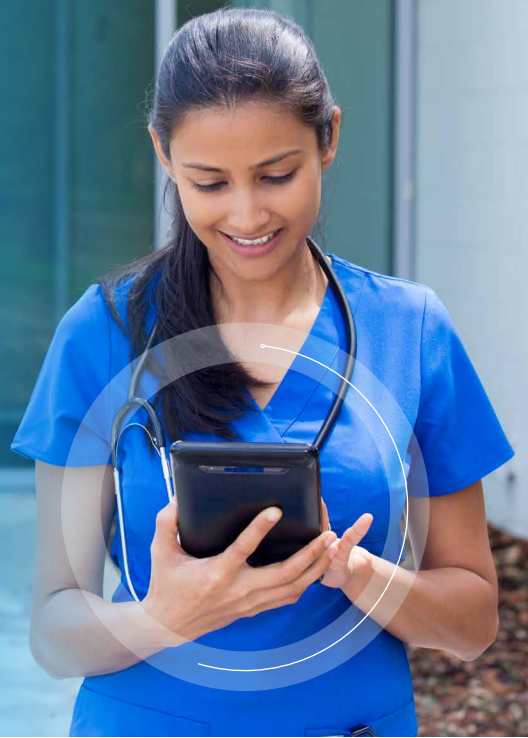
Organizational leaders must build agility and resilience into strategic and operating plans and processes so that pre-empting and reacting to change becomes part of the fabric of the business. A *"That's how we've always done it"* mentality should be replaced with a growth mentality; one which encourages the curious, open-minded approach needed to promote change and drive innovation. And of course, we need to re-tool our organizations with technology that enables frictionless change and empowers the whole workforce to succeed no matter how fast or often things change.

Here, we'll delve deep into the details of these important pillars for operational success. Happy reading.



Hertzel Kuriel
CEO, Learning Zone

2 Remove organizational silos to make change possible



Business silos – a big business problem

What are silos?

Silos exist when people in different parts of an organization don't talk to each other or share information enough. When all the parts of your organization need to work together like cogs in a wheel to succeed, it's easy to see how silos can slow you down and act as significant barriers to change. For example, if the Governance Team needs to make changes to policies, but doesn't give HR time to make relevant updates to learning materials, new recruits get trained up on old policies. Or perhaps, process owners get left out of the loop and cannot make the appropriate changes to workflows and documentation in time, so your employees continue to follow old processes that no longer support compliance or safety regulations. As you can see, silos can result in misalignment across your whole business.

So why do silos exist, when they're so unhelpful? Sometimes, teams actively choose to work in a siloed way. But more often, silos exist because:

- **the organizational culture** doesn't encourage employees to buy into a unified goal, so teams do not share priorities or working principles, and often end up rowing in different directions;
- **the technology and systems** in place are disparate, work from separate databases, and do not talk to one another, so the organization lacks a single source of truth resulting in inefficiencies, confusion, and additional risk; or



- **systems and technology** do not provide opportunities for genuine collaboration and are not accessible by frontline or deskless workers, inhibiting teamwork and productivity, and creating unnecessary process friction and risk.

Now that organizations spend more time working apart than they do together, it's important to take strides to prevent silos. But how can you do that?

Unify systems to bring interlinked functions and processes closer together

While technology is meant to help us (and when used appropriately, it does), the systems and business applications your teams use daily can create and reinforce silos. This is often the case when organizations rely on multiple legacy systems and software solutions that don't integrate well (or at all) and work from separate data sets.

For example, when teams that should collaborate closely use separate datasets, they often hold different versions of the truth. So when they need to work together to solve a problem or implement a change, they may not start working from a shared or unified understanding of the problem and end up rowing in different directions. And if their work gets done in separate places, as it often does in large organizations that have an array of legacy and new systems, they can end up working in this misaligned way for a long time before the problem is recognized and rectified – creating delays, inefficiencies, poor decisions, and additional risk.

But by taking a big-picture view, recognizing the interconnections between the teams that must work together seamlessly to implement change, and providing them with a unified platform or solution to work from, you create the foundations for an operating model that can respond faster to change.

By giving these business functions a shared database to work from and a digital space to work together, cross-departmental collaboration becomes part of your organization's modus operandi. Departments are empowered to work together successfully, make better decisions, increase efficiency and reduce risk for your organization. Plus, if your unified platform is capable of automating tasks and workflows across departments, change implementation is further accelerated and your human talent is freed up to focus on value-adding initiatives and analysis.



3 A resilient workforce underpins a resilient business



Employees, contractors, and partners are inevitably impacted by organizational change. Whether you have to update a process to meet a new regulation, or you have to adopt a new business model to stay relevant in a fast-changing environment, the people that work for you have to change what they do and how they do it.

It can sometimes feel like change is slow to implement because of resistance or poor performance from your middle management and employees. While that can be the case, it helps to look at why the resistance and poor performance occur, and to take steps to overcome them.

People may resist change due to:

- **fear of loss of job security**, for example, if people fear that automation will replace their jobs;
- **fear of failure**, because they feel unable or under-skilled to perform their job when it changes; or
- **faulty implementation** which means they are unsupported to adapt, for example, because documentation, workflows, systems, and processes do not get updated quickly enough.

So, how can you overcome this? To build a resilient, agile organization, you must empower your workforce to become resilient too. In doing so, you're giving them the foundational ability to adapt their skills to the new and emerging needs of your business. Additionally, giving your workforce the tools to implement change across documentation and systems in a joined-up, timely manner is crucial to achieving true operational alignment, and therefore resilience, throughout every level of your organization.

Workforce upskilling and re-skilling

While it is true that technology, particularly automations, will be completing a large volume of the administrative, manual, predictable, and repetitive tasks that humans currently perform, it isn't true that *"robots will steal our jobs"*. Rather, the nature of jobs and the skills businesses need will change.

Experts estimate that by the end of this decade more than 85 million jobs will be unfilled because there won't be enough skilled people to take them. So, in short, if businesses make the best use of new technologies to remain competitive, they won't be able to find the people they need to make things happen.

The remedy? A workforce learning and performance management strategy that gives your organization the skills it needs to succeed today and tomorrow.

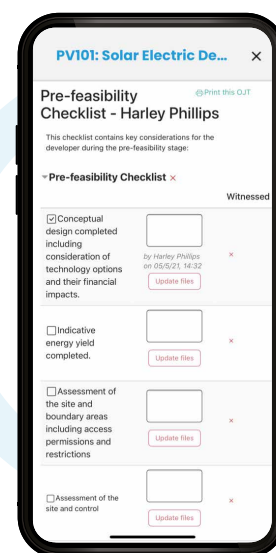
Succeeding today through workforce skills

Having an agile learning management strategy that links closely with your organization's short-term goals is key to operating flawlessly through change. But, to reap any positive rewards from learning, it's also important to make it appealing and beneficial to employees.

A joined-up approach

To give your employees the skills they need to do their best work, learning and skills development should align perfectly with your organization's policies and procedures, as well as the employees' individual skills gaps. So, instead of standardized training plans based on role and typical tasks, the best and most effective training plans are highly personalized to individual employees, based upon their performance, learning and career goals, actual compliance maturity, recent compliance changes within the organization, and the skills the organization needs them to develop.

While it might seem impossible to create personalized learning plans at scale, technology makes it possible. Using data, advanced automations, and workflows, modern learning management technology can create individualized learning plans that give each employee the skills they need to succeed every day, and the knowledge they need to work compliantly. In doing this, your organization empowers itself to operate flawlessly, no matter how fast things change.



Empower employees and make learning valuable

Organizations should also seek to give back to employees and encourage greater engagement by making learning a valuable and enjoyable experience. This can be done by empowering employees to self-serve training at a time that is convenient to them, and in a media they enjoy using. Perhaps video, or even gamified quizzes? No more forced death by PowerPoint, thanks very much! And by allowing workers to undertake self-directed training opportunities (rather than just mandatory or manager-directed training), they feel empowered to take more control over their career development and that they get greater benefits from learning.

Planning for tomorrow

Mind the gap

While making incremental changes to learning and workforce skills is important, it's also important to start planning now for the bigger changes your organization must undergo in the next 5 – 10 years. Such as the need for many employees to re-skill and digitally upskill.

But planning for the skills you'll need in the future requires a deep understanding of:

- the skills you have now;
- the skills you'll need in the next 5 – 10 years; and
- the gap in between.

This might sound simple, but research reveals that 30% of executives cannot measure the gap between skills they have and the skills they need. And 66% claim they have difficulty retaining those with in-demand skills. Which all adds up to a lot of moving parts to manage.

But, having the right technology solutions in place makes the process so much easier, and gives your organization the tools it needs to understand its skills gaps and plan for the future. Of course, there are also human-centred nuances to consider when encouraging employees to undertake upskilling and reskilling training, so we'll talk about those next.



Adopt a growth mindset

Bigger changes like re-skilling are likely to result in resistance born out of fear of loss of job security or failure. Many experts recommend adopting a growth mindset as part of your company culture to help employees move past this. Simply speaking, a growth mindset is one that:

- reframes failure into learning opportunities;
- encourages people to see opportunities rather than challenges;
- believes that skills and abilities are not fixed, but rather they can be continually improved; and
- that developing skills should be achieved through intentional daily actions as well as more formalized training.

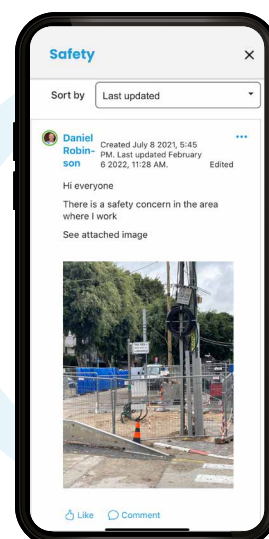
While instilling a growth mindset must start as a shift in mindset from senior leaders, it can be reinforced through your learning management strategies and processes. For example:

- by providing training to line and department managers on how to coach their reports using a growth mindset;
- by setting employee development goals as well as performance goals;
- integrating learning opportunities into everyday processes and tasks, rather than creating learning as a separate task that must be completed to 'tick a box'; and
- through having a performance review process that relies on 360-degree feedback and encourages feedback based on the effort people to perceive rather than outcomes.

While that might sound implausible in today's world of work, where employees are geographically distributed, work remotely or split between back-office and frontline teams, modern technology like learning management and employee engagement solutions make it relatively easy to facilitate.

The benefits? With a growth mindset, your employees will be: more motivated to learn and improve; able and willing to adapt their skills, behaviours, and attitudes when needed; feel inspired by their teammates' achievements; and be willing to share knowledge and help others succeed, thus creating a better culture for collaboration.

All in all, you'll have a more resilient, skilled workforce, able to support your business through whatever changes the future holds.



Reframe performance management into performance enablement

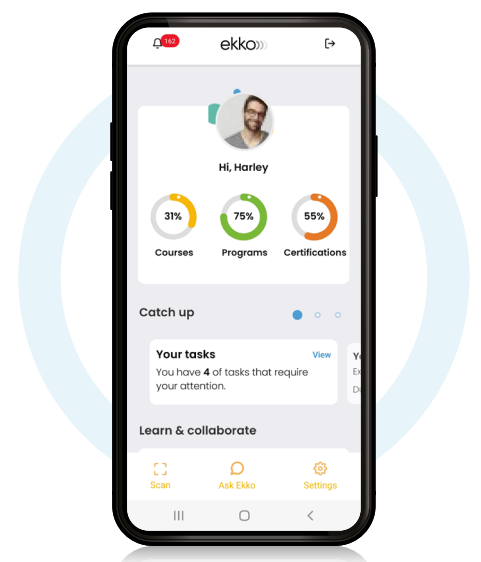
For employees to do their best work in today's dynamic business environment, they must experience feedback, coaching, and development every day — not just during a quarterly review. This means that businesses must change their approach to performance management and shift to a performance enablement model.

While performance management relies on a static, top-down approach, performance enablement focuses on finding every opportunity to empower the employee to succeed. Instead of looking backward and reviewing performance based on outcomes, it looks forwards and sets goals for employees to work towards, creating a more positive employee experience that builds on a growth mindset culture. And rather than relying solely on the judgment of a manager to appraise employee performance in retrospect, performance enablement seeks to equip employees with real-time 360-degree feedback, empower them to reach their contribution potential in the business, and take ownership of their roles, instead of simply living up to the expectations of their manager. And crucially, it seeks to understand what the organization can do better for its employees – rather than the other way around.

Shifting towards a performance enablement approach is by no means an easy feat, but it is possible by:

- **providing management with the proper training** on how to coach their reports, and identify and remove success blockers;
- **embedding learning within employee workflows** to help them develop their knowledge and skills throughout the workday (instead of making learning a separate activity that must be completed in a certain place by a set deadline); and
- **using performance data points to hold employees accountable**, and align their contributions to overall business objectives and outcomes, so employees can see their progress and how their work fits in with the bigger picture.

By acknowledging and supporting employees' career aspirations and focusing on unleashing their future potential, employees feel more valued. The result is that they add more value to their organization, stay within the company for longer, and are more willing to pass on their skills and knowledge to their colleagues. So, by shifting to performance enablement, organizations benefit from increased employee performance that's more aligned with corporate goals, boosted employee retention, and a culture of continuous learning and development.



4 Managing risk and compliance during periods of fast change



Getting ready for the future is all well and good, but it must be balanced with succeeding in the here and now. After all, there's a lot at stake; compliance violations can quickly lead to significant penalties, reputational damage, and long-term loss of customer and stakeholder trust in your organization.

Now that compliance and risk management touch almost all areas of an organization, its everyday operations are shaped by regulations, laws, and directives. Whether it's data protection issues in the IT department, tax and corruption guidelines in sales and finance, or health and safety rules for front-line employees. And this makes managing compliance during times of constant change particularly challenging.

So, a major factor that will determine a company's success is its ability to integrate regulations into its daily business processes and identify risks to react flexibly to changing regulatory requirements. In short, they have to be able to operate flawlessly no matter how fast things change.

Integrate compliance into change management

When a regulation, law, or directive change affects your business, there's a lot of work to do to make sure you're able to fully comply with it. Departments must work in unison to make sure each updates relevant documentation, systems, and processes and communicates the change out to the workforce. The workforce then has to adopt the new way of doing things.

If you're leaving all of that to manual processes, you're leaving a lot of room for error, delays, bottlenecks, and risk of non-compliance. However, you can take more control by using the

right technology. Consider how cloud-based platforms that unify the business functions involved in change management can automate many elements of the change process with advanced workflows. And going even further down the technology route, Artificial Intelligence and Machine Learning could streamline even more of your admin-heavy tasks, making managing risk and compliance much simpler, quicker, and more reliable. So, your organization removes barriers to change and empowers itself to operate flawlessly, even during periods of frequent, fast-paced change.

Commit to training and take a 360-degree approach to compliance enablement

Adapting to fast-changing regulations is difficult for everyone: your organization; your employees, partners, and contractors; and yes, even the compliance department. But, by giving your workforce the foundational skills they need to be resilient and adaptable, as well as the tools they need to succeed in their jobs, managing constant change will become much easier.

Fostering a culture that focuses on a growth mindset and performance enablement will empower employees to see change as positive instead of frightening, and adapt easily to new ways of doing things. And by ensuring that policies, processes, and documentation can be updated quickly and easily, that training programs and learning materials are updated as regulations change, and that they're instantly accessible to every employee no matter where they work, you're setting your whole workforce up for compliance success.

For organizations that have large front-line or deskless workforces, ensuring compliance, process, and policy documentation is instantly available at the moments they're needed has been a longstanding challenge. Typically, if frontline workers did not know or remember the policy implications of a field-based task, they'd have to stop work and phone the office for assistance. Or worse – wing it. And when it comes to paperwork, they're often required to take handwritten notes and transfer them to a digital system at a later time or date.

But new developments in technology provide the perfect solution. By digitizing forms and questionnaires, preconfiguring them in policy and procedure-based workflows, and making them available on mobile devices, frontline employees are supported to follow processes perfectly, and complete administration while in the field. Not only does this boost productivity, but it also reduces risk and ensures an accurate digital footprint of the actions taken. Also, AI-powered bot assistants are making it possible for organizations to support frontline workers with 'just-in-time' compliance knowledge, learning, and support via mobile devices, so they're always supported and empowered to work safely, compliantly, and productively.

Use technology to integrate compliance tasks into employee's everyday job responsibilities

The compliance risks of the modern workplace are an ever-changing landscape. However, the right technology can help organizations manage these challenges by interweaving compliance into employees' everyday job responsibilities and making it easier for them to do their jobs. When complying is easy, people are more likely to do it. So, the right technology can help build a stronger culture of compliance in your organization.

For example, if a frontline worker has to stop work, search through a knowledge-base on a mobile device to find some safety documentation, and then skim through 20 pages of text to find the paragraph they're looking for, they may give up or get frustrated and miss important details in the document. However, if they can perform a voice search instead, and have a conversational bot give them the precise information they need within seconds, they're far more likely to complete the task to high quality and compliance standards.



5 Succeed with Ekko

The smartest way to enable compliance through your people and processes



Unify policy and procedure management, learning and performance management, and employee engagement into a single platform

Ekko unifies policy and procedure management, learning management, performance enablement, and employee engagement into one platform. By bringing together the data and processes you rely on to implement change, whether that's a new business model or regulation, Ekko gives your workforce everything they need to work compliantly and productively, no matter how fast the world moves.

Using powerful automations and workflows, plus Artificial Intelligence and Machine Learning, Ekko automates and accelerates many of the manual, time-consuming processes involved in creating or changing policies and processes, coordinating documentation updates, and communicating change out to the workforce.

No more bottlenecks. No more tasks slipping through the cracks. No more communications lapses creating misalignment and risk. Simply faster, easier change management that helps your organization operate flawlessly, no matter how fast things change.

- **Better alignment between regulations, governance, policies, processes, and the systems and documentation employees use to complete their daily tasks**
- **Single source of truth data and documentation**

- A **reduction** in regulatory and safety risks
- A **reduction** in operational non-compliance
- **Enhanced** productivity
- A **system and process** that makes responding to change easier, faster, and frictionless

Accelerate policy management

Ekko gives you more control over compliance than ever before and empowers your people to do their best work at every level.

With intelligently automated processes and one central place for departments to collaborate, create, manage and communicate policies, Ekko accelerates policy management and change implementation. So your back-office teams can shift their time from admin to value-adding tasks, and teams can effortlessly coordinate change implementation across documentation, processes, systems, and more, meaning your operational frameworks stay in perfect alignment with policy and compliance needs.

Plus, with better visibility into policy management and compliance than ever before, you can discover whatever you need to know using customizable reporting dashboards and take impactful action to steer your organization in the right direction.

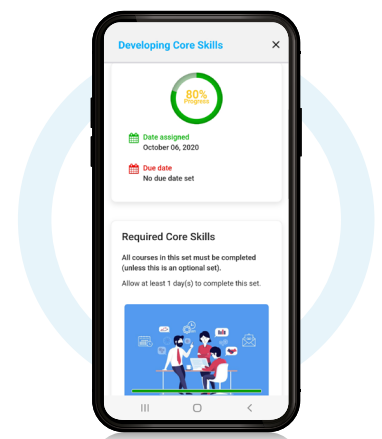
Be by their side, always, with conversational knowledge

Even if your workforce is geographically distributed or works out in the field, with Ekko, you can always support them with the latest compliance knowledge and information.

If a policy or process changes and they're working out in the field on a task that's impacted by the change, Ekko will let them know and give them up-to-date guidance.

If they're working alone, and forget a recent update to a process, they can ask Ekko using a voice search, and Ekko will tell them exactly what they need to know.

And even better, throughout every day, Ekko will log changes to policy and processes that affect each employee and track their compliance maturity. Using that data, it automatically curates and updates suggested learning content for them to review, embedding continuous learning into everyday processes and keeping their knowledge up to date.



Fuel your people with continuous learning

As a custom version of the Totara Talent Experience Platform, Ekko's Learning Management System enables you to implement a learning and skills strategy that unleashes the potential of every employee, without having to double the size of your HR and training teams.

Automate the development of individualized learning plans based upon the role, employee performance, career goals, objectives and outcomes, compliance maturity, and the needs of your organization. And increase learning engagement by making learning fun; offer training materials in a range of media formats, like video or gamified quiz, and give employees the power to self-serve training at a place and time that suits them.

Plus, you can integrate learning into daily processes with automated learning content suggestions based upon tasks completed, interaction with documentation, and recent policy, process, and compliance changes. Additionally, Ekko's Employee Engagement Solution recreates the traditional office-based working environment in a digital space, by bringing geographically dispersed teams and departments together, and giving them a space to share knowledge, learn from their peers, troubleshoot, and solve problems together. In doing this, you'll not only increase learning efficacy, but you'll also empower employees to learn from their daily tasks and interactions, as well as through more formalized training.

And, thanks to powerful data analysis and customizable reports, you get deep insights into your workforce skills profile. So you can easily identify your skills gaps and create learning strategies that prepare your organization and workforce for the skills demands of tomorrow.

Embed performance enablement into your processes

Create customized performance management or performance enablement processes, and track, manage and plan employee performance with Ekko's Performance Management solution.

Set performance and development goals based on employee career aspirations and corporate needs, give employees real-time 360-degree feedback from team members, and automatically curate a learning content playlist that gives employees what they need to succeed.

Embed learning within employee workflows to make it part of everyday processes, and track, monitor, and report on performance at multiple levels, from the individual employee to department, unit, or company level, and get the insights you need to create impactful performance strategies that prepare your organization for the future.

Bring your workforce closer together for a better employee experience

Ekko's Employee Engagement solution removes the silos created by distance and disparate systems and gives employees a place to work together.

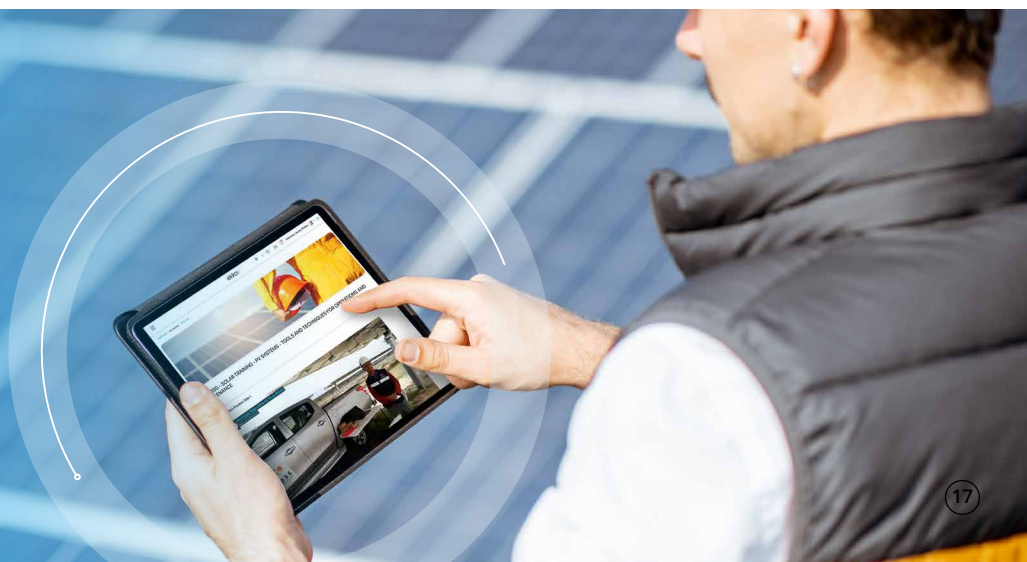
When employees stay engaged and feel valued and supported, your organization benefits from greater productivity and employee retention. Ekko gives your organization the tools to provide individualized support to every employee, no matter where they work. Automated personalized development plans and learning content suggestions provide constant support; two-way engagement tools like surveys and live polls let you discover and understand employees' perspectives; and with a central place to collaborate and solve together, employees benefit from peer-to-peer learning and better teamwork, and feel part of something bigger.

Conclusion - working flawlessly in fast-paced environments

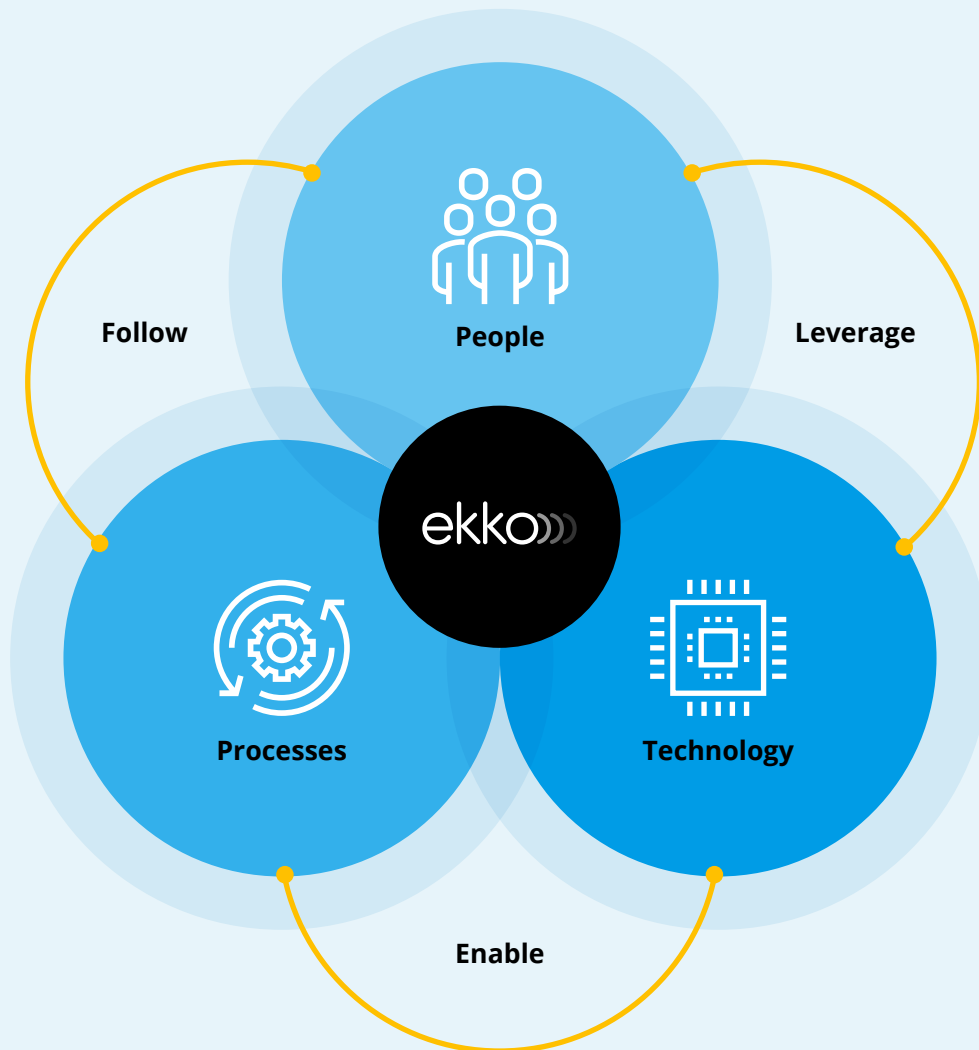
From legislation and regulatory change to technology advancements, changes in the labor market, and employee turnover. Your organization has change coming at it from all angles. It's undoubtedly hard to keep up, and perform well in the present while planning for what tomorrow will bring,

But by using the right, integrated technology as an enabler for your people and processes, you can transform your operational model into one that has the agility to redesign itself with ease.

And by enabling true collaboration across your whole workforce, nurturing their skills and resilience, and giving them the tools they need to succeed, you'll create a sustainable ability to thrive in today's fast-paced world and operate flawlessly no matter how fast things change.



Operate flawlessly, every moment of every day with people, process, and technology working together optimally.



| Technology | Process | People |
|--|---|--|
| <p>Remove silos</p> <ul style="list-style-type: none"> • Unify systems across policy & procedure, learning & development, and performance management • Make data and peer knowledge instantly accessible to everyone, including deskless workers • Automate manual processes, and use advanced workflows across departments/units • Use AI and ML capabilities to proactively guide deskless employees to work compliantly and productively | <p>Leverage tech to accelerate policy and process change</p> <ul style="list-style-type: none"> • Use workflows and automation to accelerate policy and procedure change • Communicate change to everyone – instantly • Integrate learning, performance enhancement and compliance into everyday operations | <p>Leverage tech to empower people and enable compliance</p> <ul style="list-style-type: none"> • Give everyone instant access to documentation, information and peer-knowledge • Provide ‘just-in-time’ compliance guidance to deskless employees • Increase the effectiveness of learning strategies • Replace performance management with performance enablement |

About Ekko

Ekko, built by LearningZone, is a custom version of the Totara Talent Experience Platform. Building on the solid foundations of Totara, and harnessing the power of Artificial Intelligence, we added a Policy and Compliance Management System, real-time digital transformation, and 'just-in-time' conversational knowledge capabilities. **The result? A unified system providing everything highly regulated organizations with frontline employees need to adapt to operate flawlessly, no matter how fast things change.**



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