

Operational Skills Management

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OSM Solution

- Platform to provide connections between;
 - Business Goals ↔ Functional Roles;
 - Functional Roles ↔ Skills;
 - Skills ↔ People;
 - Skills ↔ Learning Resources;
 - Learning Resources ↔ People;
- **Actionable profile for Organizations and People**
 - Current Skill Level and trend in skill level changes
 - Training related to skills
 - Test Scores related to Skills
 - **** foundation to relate skills to performance**



Part of an overall Management Plan



Traditional Approach to “Training”

Manager: “Tell me what my team needs to know about XYZ”

Learning Center: “Here is a list of 100 learning resources for XYZ” ...

Manager: “That’s too much stuff” ...

OR

Manager: “What training do you want?”

Employee: “I want to take a class in the ABCs...”

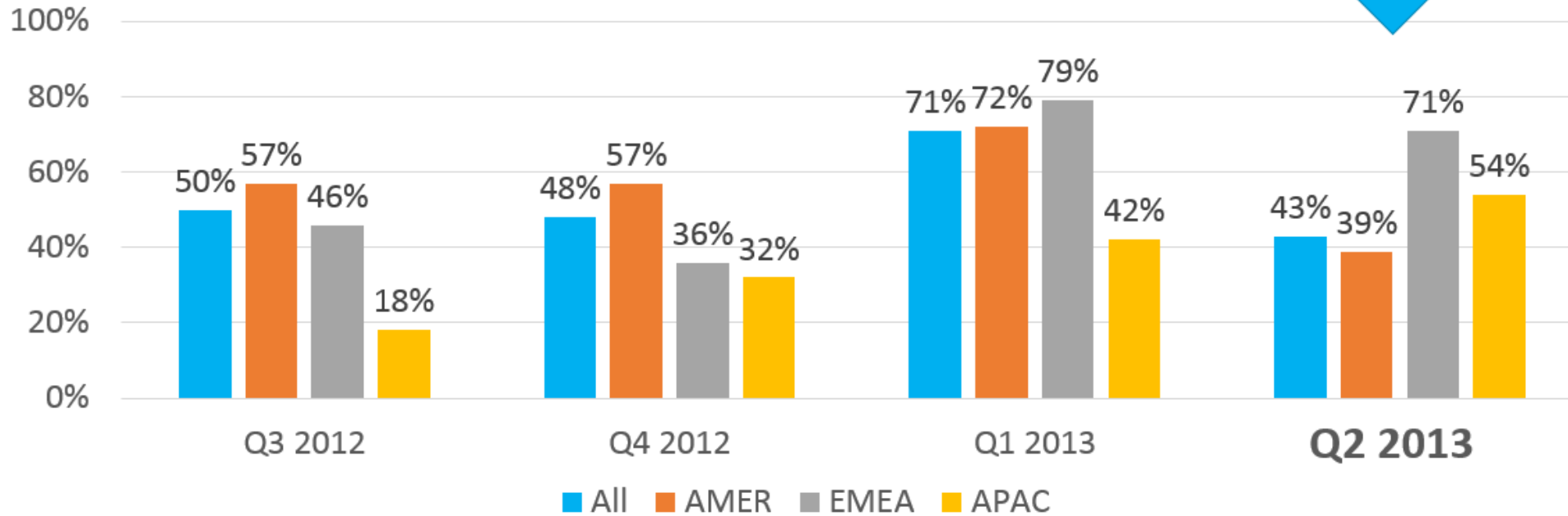
Manager: “How will that help the team?”

Employee: “I don’t know, just thought that would be cool”

Measurement is based on course completions

Virtual Instructor Led Training

- **8** Separate WebEx Sessions were conducted
- **43%** of those who enrolled actually attended
- Substantial decrease from Q1 2013 = 71%



6



Skills Management

Skills Management vs. Performance Management

- **Skills management: *WHAT YOU KNOW...***
 - The practice of UNDERSTANDING, DEVELOPING people and their skills.
 - Well-implemented skills management should identify the skills that job roles require, the skills of individual employees, and any gap between the two.

- **Performance management: *HOW WELL YOU DO IT***
 - Measuring activities which ensure that goals are consistently being met in an effective and efficient manner.
 - Can focus on the performance of an organization, a department, employee, or even the processes to build a product of service, as well as many other areas.

Competencies

Well defined competencies help lay the infrastructure to hire, develop and promote the next generation of top-performing employees.

Competency characteristics include:

- What a person knows regarding facts, technologies, a profession, procedures, a job, an organization, etc.
 - **Technical knowledge/skill**
 - **Process Knowledge**
 - **Management Knowledge/skill**
 - **Professional Skills**

Competencies provide employees with the agility, flexibility, and adaptability to meet the current and future strategic needs of the organization.

Skills Hierarchy

4 levels of hierarchy are available for decomposing Skills and Behaviors. The details can live at any particular Level.

- ❖ Competency Category
- ❖ Competencies
- ❖ Skills/Behaviors
- ❖ Assessments (per Job Family)
- ❖ Questions

With this Hierarchy you can look at the data from the Category level all the way down to the question level.



Business Challenge/Problem

Business Problem

- Change occurs in all aspects of business;
 - ***People, Process and Technologies.***
- Employees are engaging with customers on a daily basis and must stay aware and informed;
 - ***Quality Service and Support.***
- Managers must understand the talent profile of their team;
Quickly respond to Business Issues and Requests.

A computer monitor with a black bezel and a silver stand. The screen is black with the text "OSM Solution" centered in a light blue, italicized font.

OSM Solution

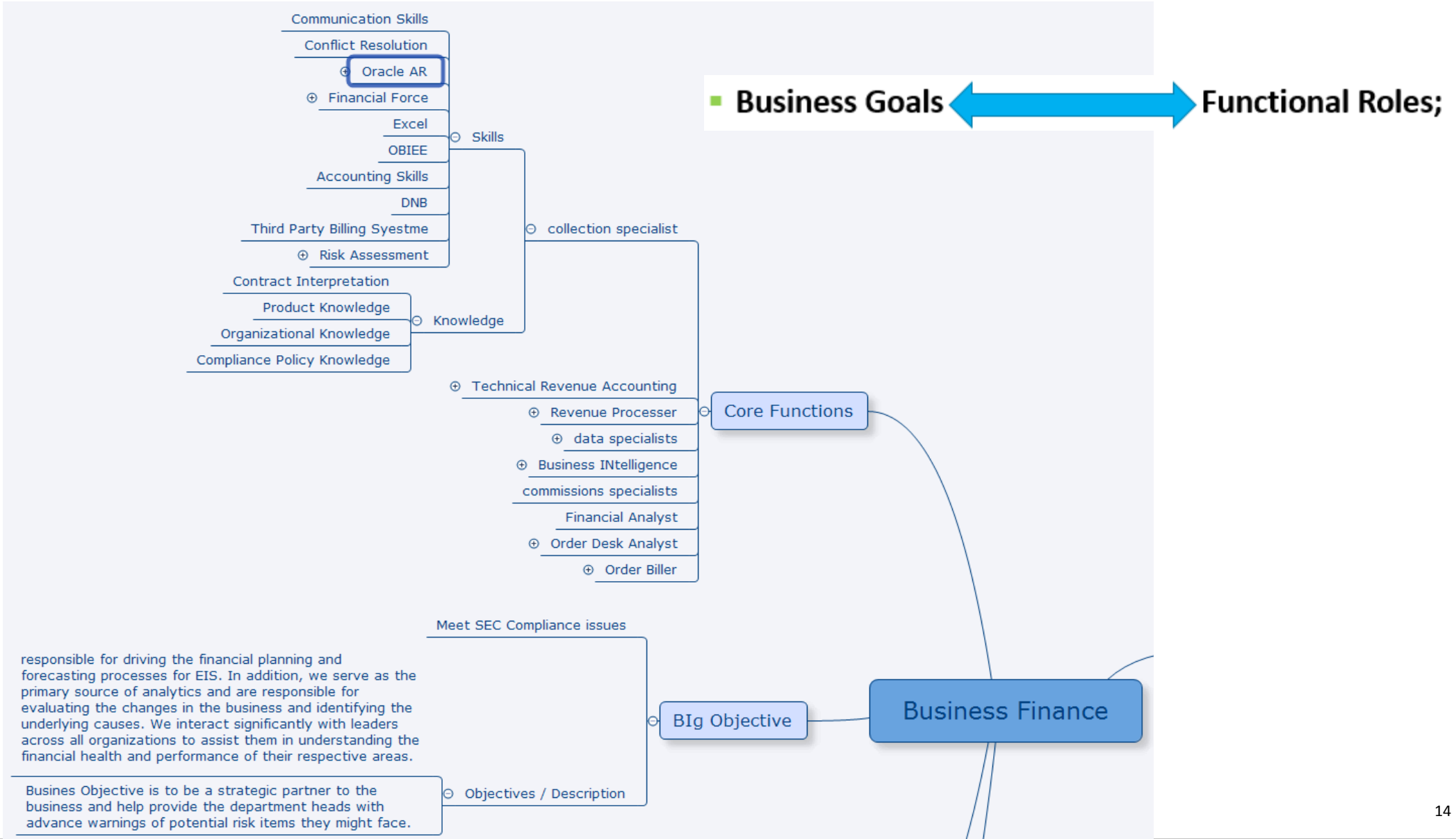
Defining Skills Management – “THE HARD WORK”

- Capture and Decompose Business Objectives
- Define Functional Roles
- Identify the skills per Role
 - Categories/Competencies/Behaviors or Topics
- Identify “Common” skills vs Unique Skills
- Start with “General Approach” per Job Role
- Develop Assessments per Job Role
- Determine Rating Scale(s)
- Determine Target/Benchmarks

Think about this as a “Design” project



Identifying Skill areas (aka Competencies)



Competencies and Roles

Functional Roles  Skills;

Type	Category	Competency	Topic	Business Intelligence	Collection Specialist	Commissions Specialists	Data Specialists	Financial Analyst	Order Biller	Order Desk Analyst	Revenue Processor	Technical Revenue Accounting	Suggested Categories
Knowledge	Process	Revenue Recognition Knowledge		y			X	X	X	X	X		Technology & Tools
Knowledge	Professional	Accounting Principles	Topic 606							X			Process
Knowledge	Professional	Accounting Principles	Basic Accounting	X		X							Professional (Role Based)
Knowledge	Professional	Accounting Principles	ASC985-605							X	X		Verint
Knowledge	Professional	Accounting Principles	ASC605-25							X			
Skills	Professional	Business Finance	Understanding Contracts					X		X			
Skills	Professional	Business Finance	Understand Contract terms								X		
Skills	Professional	Business Finance	Risk Assessment	Colle	X								
Skills	Professional	Business Finance	Accounting Skills	jourr	X					x	x		
Skills	Professional	Communication	Technical Accounting Writing Skills							X	X		
Skills	Professional	Communication	Email Communication					X		X			
Skills	Professional	Communication	Communication Skills	x	x	x	x	x	x	x	x		
Skills	Professional	Communication	Basic Technical Writing	X		X							
Knowledge	Professional	Compliance Policy Knowledge		X	X	X		X	X				
Knowledge	Professional	Contract Interpretation		X	X	X		X	X				
Skills	Professional	Customer Service Skills	Research Issues							X			
Skills	Professional	Customer Service Skills	Research and Problem Resolution	X	X	X	X	X	X	X	X		
Skills	Professional	Customer Service Skills	Conflict Resolution	X	X	X				X			
Skills	Professional	Customer Service Skills	Active Listening										
Knowledge	Professional	Legal Terminology - Orders and Contracts							X				
Skills	Professional		Order Process Flow, OT					X		X			
Skills	Technology & Tools	Customer Standards	Oracle Modules					X					
Skills	Technology & Tools	Data and Reporting	Tableau	X		X							
Skills	Technology & Tools	Data and Reporting	SQL Skills	X		X							
Skills	Technology & Tools	Data and Reporting	Predictive Analysis	X			x						
Skills	Technology & Tools	Data and Reporting	ETL - Talend	X									
Skills	Technology & Tools	Data and Reporting	Data Quality	X		X							

Business Finance Skills Identification

Business Finance - Master Form
For Karin Neizmik Admin

Oracle

Accounts Receivable

	N/A	None	Basic	Intermediate	Advanced	Expert
Revenue Accounting	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reports	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Payment History	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Navigate Invoice	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Cash Apps	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Financial Force Billing Process	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Service Contracts Billing Process	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
QTC Billing Process	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Organizational Coverage by Role and Competency

Count of Full Name	Colu								
Row Labels									
Bus Fin - Oracle									
AR									
Cash Apps		4		4					
Financial Force Billing Process		4							
Navigate Invoice		4		4					
Payment History		4		4					
QTC Billing Process		4							
Reports		4		4					
Revenue Accounting		4		4					
Service Contracts Billing Process		4							
Data									
Customer Install Base Data		1	4						
Customer Master Data		1	4						
Item Master Data		1	4						
Service Contract Master Data		1	4						
General Ledger									

Evaluating a Team's Skills



Targeted Training based on Skills assessment



Competencies by Team

V11.2 DPA
Coffey, Torrey
SDA

78%

Add Training
Options

Behavior
Latest Results

DPA Validation
Validator Settings and Pre-Req

33%

Integrations
Integrating with WFM Adherence and Scorecards

33%

Next Best Action
DPA Scripting

33%

Process Discovery
Discovery and Analysis Overview

33%

Trigger Administration
Overview and Types

33%

Verint Learning Center

Recommended Objectives and Training

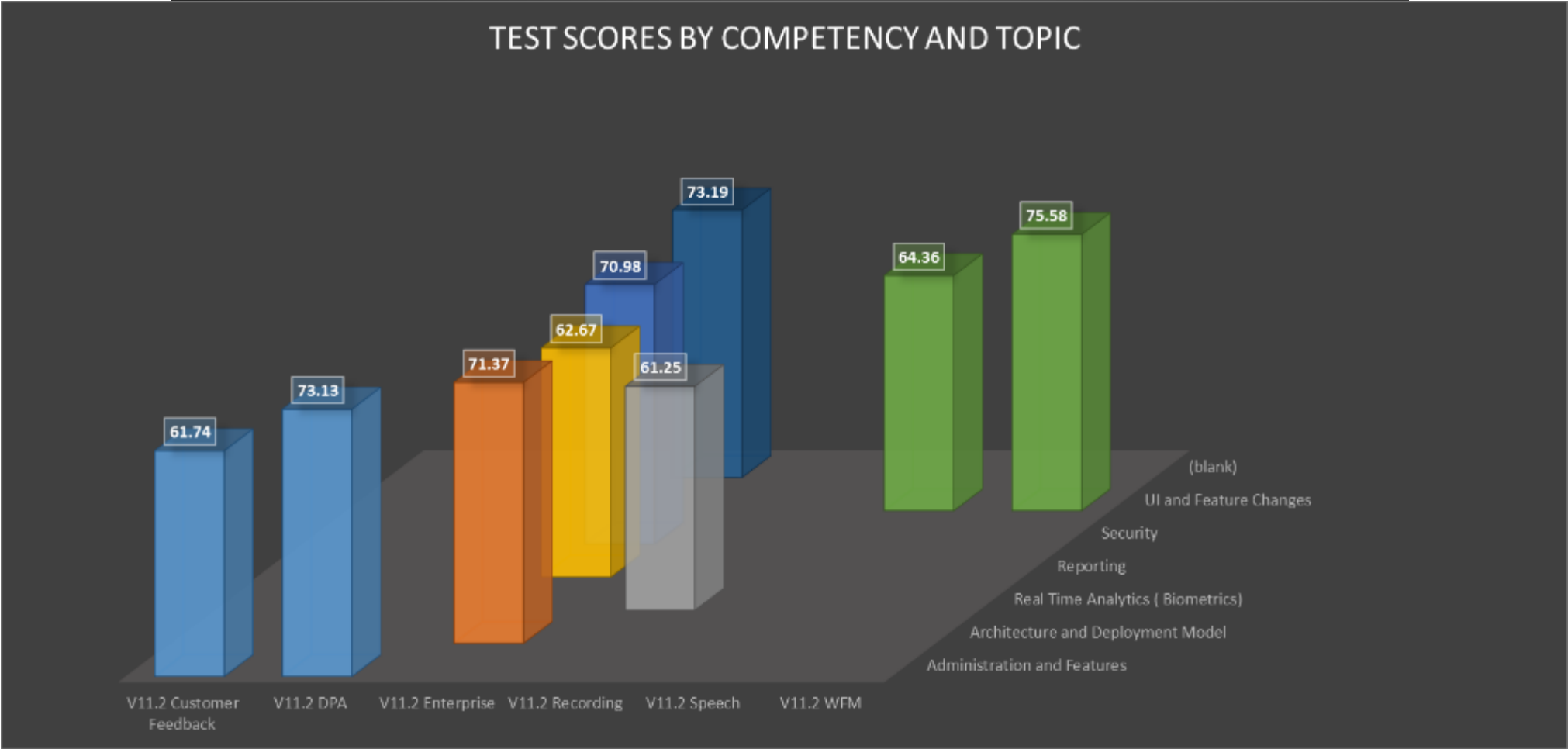
Show All Recommendations

V11.2 DPA

- WFO V11.2 Assessment: DPA] Assessment ☆☆☆☆☆
Test your knowledge of DPA Version 11.2
- WFO V11.2 Enablement Clip: Desktop and Process Analytics - Upgrade to V11.2] Demo / Video ☆☆☆☆☆
This enablement session provides an overview of the DPA upgrade process from to V11.2. This session is intended primarily for the following job family: TECHNICAL
- WFO V11.2 Enablement ILT: DPA] Physical Classroom ☆☆☆☆☆
The purpose of this classroom session is to demonstrate and provide hands-on access to the new and changed features in DPA Version 11.2.
- WFO V11.2 Enablement Package: Desktop and Process Analytics Updates] eLearning Clip ★★★★★
This enablement package contains information on the WFO V11.2 updates for Desktop and Process Analytics. It is divided into 6 subtopic overviews and video demos that include DPA Validator (4 parts), Next Best Action, Process Discovery, Remote Channels, Integrations (2 parts) and Enhanced Trigger Support (3 parts). The primary audience for this enablement is: PROJECT MANAGERS APPLICATION JOB ROLES TECHNICAL JOB ROLES
- WFO V11.2 Enablement Webex: What's New in DPA] Virtual Training (Internal Only) ★★★★★
In this session, you will learn about the changes in Version 11.2 DPA.

Analyzing Learning against Competencies

- Skills ←————→ Learning Resources;
- Learning Resources ←————→ People;



Develop an Action Plan

- Analyze organizational gaps in skills and knowledge
- Create a prioritized team development plan
- Analyze individual skills assessment per job roles.
- Look for common needs across multiple job roles
- Analyze existing training resources and determine how to handle any gaps in resources
- Create individual learning programs for each employee based on performance expectations
- Set completion and review follow up dates with each employee
- *Remember: This is a journey not a destination...*





What's in it for me... (WIFM)

- ***Provides a Voice of the EMPLOYEE, the individual's skill capability to execute against Business Objectives.***
- ***Identifies the skills and knowledge needed for functional roles within the organization.***
- ***Identifies recommended learning resources to close the skill gaps.***
- ***Provides clear view of the “learning” challenge and an Actionable Skills Profile for the organization.***





Summary

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- Platform to provide connection between;
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Thank you for your participation.