The disparity between current and required innovative talent management strategies at a selected insurance company in Cape Town

by

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DECLARATION

I, Tasneem Abrahams, declare that the contents of this thesis represent my own unaided work, and that the thesis has not previously been submitted for academic examination towards any qualification. Furthermore, it represents my own opinions and not necessarily those of the Cape Peninsula University of Technology.

Signed   **Date**

ABSTRACT

Talent management is not a new concept in the field of human resource management but, increasingly, organisations need to prepare for fast-paced change in how they attract, recruit, motivate, develop and retain top talent. With the fourth industrial revolution shifting the world of work in a technological, digital and data-driven direction, organisations need to ensure that their human capital policies have a talent strategy and agenda that is future fit for the new world of work. If this is not the case, it becomes imperative to identify what the discrepancies between current and required innovative talent management strategies are.

This study was undertaken at a financial services organisation based in Cape Town, South Africa, and was guided by the research question: "How are the current talent management practices lacking in terms of recruiting, developing and retaining newly-identified, scarce-skilled employees?"

The study aimed to identify the gaps in the current talent management process, with specific reference to their impact on recruiting, developing and retaining newly-identified, scarce-skilled employees. In addition, the study aimed to produce recommendations for practical improvement in how the organisation conducts its talent management practices as it navigates the new digital world of work. The study employed a qualitative research methodology, utilising a semi-structured interview guide to interview a sample of the human resource community at the financial institution. The findings were analysed and interpreted using inductive and thematic analysis.

The findings indicated that there were gaps in the current talent management process. These pertained mainly to how to attract and recruit those with scarce skills, the relevant training offered to develop or enhance scarce and critical skills, and the mechanisms that are actually important for the retention of this new-age type of employee. Practical recommendations are made for moving to a more innovative approach to managing scarce and critical talent.

The research is significant in that it contributes to an existing body of knowledge. It will assist the human capital fraternity with understanding and embracing the fact that the talent landscape has shifted. This requires of an organisation a more innovative approach in order to remain a forerunner in the industry concerned, by capitalising on the organisation's most valuable resource, its employees.

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DEDICATION

It is with genuine gratitude and appreciation that I dedicate this thesis to my Abrahams and Amon family for their unwavering support and encouragement during the completion of this thesis.

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ABBREVIATIONS AND ACRONYMS

TM	Talent management
TMS	Talent management strategy
HR	Human Resources
FTI	Faculty Training Institute
HC	Human Capital
L & D	Learning and development
T & D	Training and development

CHAPTER 1:
INTRODUCTION AND BACKGROUND TO THE STUDY

1.1 Introduction

The concept of talent management was introduced in the 1990s by Cheese et al. (2008:9). The concept refers to bringing together various individual practices such as recruitment, development, remuneration, benefits, and retention in one end-to-end process. Organisations worldwide have since increasingly recognised the importance of human resources and their contribution to achieving an organisation's goals and objectives. They have therefore started to develop talent management strategies with the sole purpose of attracting and retaining talent.Organisations worldwide are creating talent-driven organisations. Those who successfully implement this approach can generate significant business value.

Grobler and Diedericks (2009:5) claim that the process of talent management should be engrained in the corporate strategy. Both Tanton (2007:3) and Nazo (2014:1) agree that effective talent management is a driving force for business success. Grobler and Diedericks (2009:7) call on organisations to attract and retain scarce-skill talent that drives improvement in productivity, quality, innovation and customer satisfaction. There is thus general agreement that talent management should be seen as key to establishing and maintaining competitive advantage.

The study acknowledges the impact of talent management on all level of competitiveness. However, since the environment is ever-changing, the skill set required to stay forerunners within the industry has significantly changed. The organisation therefore places great emphasis on HR's strategic contribution to the business, especially HR's facilitating the process of attracting, developing and retaining scarce and critical skilled employees. This process may necessitate a more innovative approach to talent management.

1.2 Background to the study

Lockwood (2006:251) argues that organisations that intend to remain leaders in their sectors must recruit talented individuals with scarce skills that can give the organisation a competitive advantage. Yet it has become increasingly challenging to source and retain these individuals. The consequence is that failure to implement effective and innovative talent management strategies will result in the loss of sustainable competitive advantage (Tanton, 2007:4). While the financial services industry has changed immensely and will continue to do so, a key differentiator between a successful and unsuccessful financial services business remains the quality of the talent management strategy.

In October 2017, the *Mail and Guardian* (2017:8) announced that the organisation under study was ranked the top employer in the financial services industry for the 7th consecutive year. The

South African Top Employer Institute's certification programme involves an HR best practices survey; on-site validation; an external audit by Grant Thornton and an evaluation by a panel of international experts based in the Netherlands. The Top Employer Institute's main objective is identifying the best organisation in terms of people management practices.

Then HR Director, Anisha Archary, expressed her pride and delight at winning the award. The strategic leader noted that the award came at a critical time, as the organisation was preparing for listing on the Johannesburg Stock Exchange as an independent entity. The organisation has since attributed its success to an investment in people practices. However, in playing the game of survival in a technologically advanced environment, it has identified that it requires a whole host of new scarce and critical talent to maintain its operating agility.

According to Mercer (2018:10), these newly identified scarce, and critical skills are not covered by standard talent management processes and therefore require innovative means of attraction, development, and retention. If the organisation does not act quickly, it may lose competitive edge in the financial market as skills identified contribute significantly to the delivery of new product offerings and services to clients within South Africa.

Not having these talented scarce-skill resources places excessive pressure on team members to deliver without the relevant knowledge or skill to do so. Consequently, research on this topic is underpinned by both a strategic and operational need within the insurance company. In 2016, the chief executive officer sent out a communication to the business (Old Mutual, 2017) setting out key strategic priorities. Included in the list of priorities was winning the war on talent. This is an extract from his communication:

> *One of the battlegrounds in the organisation's strategy talks to the need to win the war on talent. It is important that we have the right people with the right skills to ensure that we deliver on our strategic objectives.*

This sentiment drove my desire to study the present topic. Strategic leaders have communicated the importance of attracting, developing, and retaining the correct talent within the business. Significant emphasis is placed on attracting and retaining critical skilled employees that are required to improve performance and grow the business.

Operationally, the lack of plans to attract and retain valuable human resources, has led to a significant loss of talented employees, which in turn has had a ripple effect on daily operations. Managers and team members are frustrated by the additional workload they inherit. This has led to an unpleasant working environment for many. Additionally, many scarce-skilled employees create new product offerings, safeguard the business from risk or generate new

business. Without acquiring and retaining the requisite skills, certain business units can lose profitability, market share or even expose themselves to unnecessary online risk.

The question of how to attract, develop and retain scarce-skilled employees to contribute to the organisation's strategic objectives is thus highly topical. The research intends to gain an understanding of the gaps within the current talent management process to improve HR's strategy for attracting, developing and retaining scarce-skilled employees.

1.3 Problem statement

Lack of innovative talent management processes has led to a substantial loss of talented critical and scarce-skilled employees within Old Mutual in South Africa since April 2016. An article published by PWC (2016), Talent Mobility: 2020 and Beyond, describes where the problem stems from: "The business world is in the midst of fundamental change and in the next decade the ability of organisations to manage their global talent efficiently will mark the difference between success and failure". So, while the organisation that is the subject of this research has repeatedly won the top employer award, indicating that the business prides itself on investing in people practices, a new trend has been identified by the HR community. The organisation has been losing key resources, specifically employees with scarce and critical skills. According to Makgoatha (2016:18), these employees include digital resources experts, cyber security specialists and enterprise and solution architects.

Since the organisation's core business is underpinned by those who hold a financial and actuarial skill set, the organisation has had years to find creative ways in which to manage and retain those scarce-skilled individuals. However, other skill sets, and roles have surfaced as the business has responded to the ever-changing technological environment. For example, with newer skill sets such as digital, cyber security, enterprise architecture and programme management, HRBPS and Talent acquisition specialists within the organisation are struggling to attract, recruit and retain these individuals. Most of the individuals concerned are passive candidates and require innovative engagement and enticement to even consider going through a formal recruitment process. (Kandefer, 2020)

Once HR has successfully managed to attract, recruit and onboard the new resource, the focus shifts to developing the employee. Again, for skills that are known to be rare within the organisation such as finance and actuarial skills, the organisation has made a significant investment in establishing thorough developmental plans and programmes that assist talented individuals in honing and refining their skills set. With the emerging new scarce skills such as digital and data, cybersecurity and IT architecture, the organisation lacks the developmental plans and programmes required to transfer, improve, refine or broaden the skills set. As far as

retention is concerned, the organisation has made progress in terms of offering basic retention packages such as bonus incentives, share allocation schemes and employee benefit flexibility. Still, while traditional benefits and salaries are important, Rensburg (2017) notes that the organisation has identified a shift in what prompts scarce and critical-skilled employees to remain within the organisation. Retention has evidently become a large problem for the organisation. Within the insurance company's HR forums, there has been discussion of the disturbing impact that the loss of scarce and critical skilled employees has had on business service delivery and team morale. The number of resignations processed for scarce and critical-skilled employees has greatly increased. Subsequent exit interview feedback has been harsh in terms of the employees' dissatisfaction with the basic retention packages offered. Possible reasons for this include the constantly evolving environment in which the organisation operates and, more specifically, the organisation's response to surviving and thriving in this environment.

As mentioned previously, the insurance company has made significant strides in attracting, developing, and retaining well-known scarce-skilled talent in the organisation. But since the organisation is embarking on digital transformation, with the sole objective of digitally revolutionising the way they interact with their clients, a new set of skills is sorely needed to enable the process. As already indicated, the challenge currently being experienced is how to adapt or improve talent management strategies to attract, develop and, most importantly, retain newly-identified, scarce-skilled employees. Should the organisation fail to implement innovative talent management strategies, the impact could be catastrophic. Potential fallout includes (a) failure to provide leading financial products and services, (b) failure to digitally transform how the organisation interacts with its clients and (c) the risk of losing competitive advantage in the South African financial industry.

1.4 Aim and objective of the study

1.4.1 Overall aim
The study aims to identify the gaps in the current talent management process at the selected organisation, with specific reference to its impact on recruiting, developing and retaining newly-identified, scarce-skilled employees. The study also aims to produce practical implementation strategies for the organisation, and actively influence how it conducts its talent management practices.

1.4.2 Main objective
To determine if a lack of innovative talent management processes has led to a substantial loss of talented critical and scarce-skilled employees within Old Mutual South Africa since April 2016.

1.4.3   Explanation of main objective

In order to determine why the problem exists, the study will ascertain what innovative/ modern talent management practices are lacking in the current talent management process. It will seek to determine if the problem is caused by the incompetency of people, ineffective processes or outdated systems.

The study will then identify what developmental initiatives, training or learning are missing in terms of transferring and nurturing newly identified scarce skills within the organisation. This will be followed by an examination of how current retention strategies are falling short of being appealing enough to retain scarce-skilled employees. Finally, as mentioned above, the study aims to provide practical recommendations for the holistic improvement of the current talent management process.

1.5 Research question
The research question that will guide the study in identifying the cause of the problem and potential solutions is formulated below. There was no need for hypotheses since the study is qualitative in nature and non-statistical.

1.5.1 Main research question

How are the current talent management practices lacking in terms of recruiting, developing and retaining newly-identified, scarce-skilled employees?

1.5.2 Explanation of main research question

This study aims to identify gaps possibly existent within the current talent management process, with specific reference to attracting, recruiting, developing and retaining newly-identified, scarce-skilled employees within the organisation.

1.6 Delineation of the study
The study is limited to one financial institution, Old Mutual South Africa, based in Cape Town, South Africa. Data will be gathered primarily within Old Mutual Cape Town and relate to scarce skills within Old Mutual Cape Town. The target population and sample group include only participants who have had direct experience of or involvement with the research problem. This target population comprises only employees of Old Mutual. No third-party service providers were interviewed. The study focuses on a problem identified in 2016 and focuses specifically on innovative practices to retain newly-identified, scarce-skilled employees, and not all employees within the organisation.

1.7 Research methodology

Research methodology, as described by Brynard and Hanekom (2006:25) is the "how" of collecting data and processing it in the framework of the research process. The next section provides a brief overview of the research methodology and design. Chapter 3 of the study expands on this extensively.

1.7.1   Research philosophy and paradigm

Saunders et al. (2009:124) explain that a research philosophy is the foundation of any research. It influences the choice of research strategy, formulation of the problem statement, choice of the research methodology, data collection tool(s) and the process of analysis. The chosen research philosophy is naturalistic, maintaining that reality cannot be measured directly, but is rather something perceived by people and filtered through their prior experience, expectations, and knowledge.

The research paradigm is a set of shared beliefs, perspectives or ways of thinking that informs the interpretation of the research data (Kivunjai & Kunyini, 2017:1). This study was conducted within the Interpretivist paradigm, which centres on understanding the viewpoint of the participant being observed or researched.

1.7.2   Research method and design

The study utilised a qualitative methodology. Kumar (2019:18) explains that the primary purpose of a qualitative study is to describe a situation or problem. The research provides an account of feelings, experiences, opinions and perceptions regarding a situation or problem without quantifying it. The qualitative methodology was applied within an exploratory design. Hair et al. (2011:148) maintain that an exploratory design is best when the study collects primary data that aims to explain the topic of study.

1.7.3   Data Collection Instrument

Since the design of the study is non-experimental, the primary data collection mechanism consisted of semi-structured interviews. These interviews comprised four sections that centred on key concepts or phases of talent management. Each section consisted of questions relating to the participant's experience of and opinion on what was lacking in each phase.

1.7.4   Validity

Leung (2015: 324) asserts that the validity of the research refers to the level of appropriateness of the tools and processes used to conduct it. In this study, the researcher used a pilot test project to assess the correctness and appropriateness of the questions to be included in the semi-structured interviews, and to make sure that they would elicit the desired information.

1.7.5 Reliability

Brynard and Hanekom (2006:48) maintain that reliability pertains to the accuracy and consistency of measures. In this study, the researcher made use of an internal consistency procedure whereby the same interview guide was used throughout and the researcher checked on the similarity of the responses.

1.7.6 Population

Alvi (2016:10) describes the target population as all the members who meet the criterion specified for the research investigation. In this study, the researcher chose to involve four segments within the Old Mutual group, namely Old Mutual Personal Finance, Old Mutual Mass Foundation Cluster, Old Mutual Capability Cluster and Old Mutual Customer Solutions. Members of the HR community formed part of the population of the research study.

1.7.7 Sample

Alvi (2016:10) explains that a sample is an extract of a population, a smaller population that is nevertheless representative of the population as a whole. This is necessary for the data generated from the sample to be appropriate, useful or generalisable. The study made use of purposive, non-probability sampling based on the accessibility and availability of the respondents.

The researcher targeted engagement with 34 participants across various segments in the organisation to ensure a fair and accurate representation.

1.7.8 Data interpretation and analysis

Inductive analysis was used to interpret and analyse the data collected via semi-structured interviews. Percy et al. (2015:80) and Sunday (2017:28) note that this is the most common mode of analysis associated with qualitative data collection.

In analysing the qualitative data, the researcher grouped the data according to the four main subsections in the interview guide. Further analysis included grouping data according to patterns determined by whether a potential discrepancy was people-, system- or process-related. Participants' answers were grouped based on their opinions or experiences. The use of direct quotations or quoted examples elucidated the emerging pattern.

1.8 Ethical considerations

Flick (2018:135) characterises research ethics as concerned with the effect that the researcher's involvement could have on the people with or about whom the research is being conducted. The researcher is required to ascertain if there are any possible violations, dangers or harm that may come to participants should they participate in the study. Research ethics oblige the researcher to ensure that these factors have been proactively and appropriately managed prior to his or her embarking on the research study.

In order to comply with ethical standards, the research study was only commenced after formal approval had been obtained from the research ethics committee at Cape Peninsula University of Technology and permission had been granted by the relevant HR Executives of the segments in which the research would be conducted. Participation by the interviewees was voluntary and with informed consent. The researcher ensured strict adherence to quality and integrity standards throughout the study.

1.9 Significance of the research

The significance of the research lies partly in that it will contribute to existing frameworks within the organisation. The study was steered by the researcher's role as a Talent Acquisition Specialist and then HR Partner within the insurance company and her sense of the need to improve the quality of the service offered to the business. The proposed study aims to positively influence the way in which talent management is conducted at the organisation.

The research also aims to produce practical implementation strategies for the organisation and actively influence how it implements innovative talent management strategies that are suitable for the new world of work within the digital realm.

The research is significant as it aims to achieve one of the key strategic drivers of the insurance company and its executive management, that of winning the war on talent. The strategies proposed will ensure that the key stakeholders in the talent management process are innovative in their approach to attracting, developing and retaining key talent at the insurance company under study.

Finally, it is hoped that the recommendations made will be applicable to HR in other large corporate environments.

1.10 Explanation of key concepts

The following terms are frequently encountered in this research study:

- Talent Management – According to Pillay et al. (2008:312), talent management refers to: "the sum of people's capabilities, experiences, competencies, attitudes and behaviour that can be turned into organisational performance"
- Scarce-Skilled Employee – Agriseta (2016) describes a scarce-skilled employee as an employee who owns a critical skill that is in absolute demand. These individuals own a rare skill or qualification
- Organisation – Also commonly referred to as a business, enterprise or corporation
- Competitive advantage – Wang (2014:32) describes competitive advantage as the ability to outperform competitors due to acquiring or developing a set of critical attributes
- Recruitment – The Business Dictionary (2018) describes recruitment as the process of finding and hiring the best candidate for a job opening in an appropriate and cost-effective manner
- Development – As explained in The Business Dictionary (2018), development is the process of improving and enhancing (oneself) through activities that lead to increased knowledge or a desired qualification
- Retention – The Business Dictionary (2018) defines retention as the effort by a business to create an environment that supports staff to remain within the business.

1.11 Limitations of the research

The insurance company at which the research took place is a large organisation comprising several segments. A possible limitation was that the study was confined to only four segments. Therefore, the study's results are applicable to those four segments alone and not the entire organisation.

It was time-consuming to categorise thematically the large amounts of raw data. The process required several attempts and reiterations under the supervision of the academic institution to ensure that the raw data was used in a manner that answered the research question adequately.

1.12 Study framework

The thesis consists of the following chapters:

1.12.1 Chapter 1: Introduction and background

This chapter introduces the context of the research and its main objectives. It introduces the research question that will guide the study. The chapter delineates the study as a whole and provides an overview of its structure.

1.12.2 Chapter 2: Literature review

This chapter consists of a critical evaluation of current and previous research relating to the topic and research question. Various academic books and journals are consulted to provide the reader with access to material meaningfully pertaining to the research.

1.12.3 Chapter 3: Research methodology

This chapter will provide an account of the research methods used, including the data collection method and its relevance in answering the research question. Also provided are reasons for choosing the methodology and a description of how it was deployed in conducting the field research.

1.12.4 Chapter 4: Research findings

In this chapter, the research results are described. The chapter provides an overview of the key themes identified during the interview process. The themes are supported by verbatim quotes, opinions and examples. Graphic representations of the data are also provided, comprising a range of tables, charts and graphs.

1.12.5 Chapter 5: Research discussion

In Chapter 5, the researcher provides an in-depth discussion of the raw findings, focusing on key themes and trends emerging from the interviews. The discussion is centred on highlighting what core discrepancies were identified within the talent management practice at the organisation concerned. To conclude the chapter, the researcher indicates how the research question has been answered.

1.12.6 Chapter 6: Recommendations and conclusion

In Chapter 6, the researcher provides recommendations regarding the discrepancies identified and discussed in Chapter 5. An overall recommendation is made to ensure that the organisation moves to a more innovative approach to talent management. Finally, a conclusion to the study is provided.

1.13 Summary

This chapter has introduced the background and context of, and rationale for, the research study. In addition, it has articulated the problem statement and explained the need for and significance of the research study. It has provided a brief overview of the research methodology employed in the study and supplied an outline of what the reader can expect in the chapters to come.

CHAPTER 2:

LITERATURE REVIEW

2.1 Introduction

Taylor (n.d.) describes a literature review as a broad and critical evaluation of what has been published on a topic by other accredited scholars and researchers. The literature review presents information from sources that are relevant to the study. This information is then organised according to themes covered in the research. This chapter aims thus to delineate a theoretical and conceptual framework for the present research study.

Structurally, the literature review adopts what is commonly known as a triangular or funnel approach (Allen-Ile, 2013). Since the insurance company operates in an international arena, the literature starts by discussing the importance of talent management globally. Thereafter the focus narrows to South Africa's scarce skills, with significant emphasis placed on scarce skills within the financial industry and organisation of choice. Topics associated with the context of the research problem are explored, including the advent of the fourth industrial revolution and the digital era. Next, key concepts and theories concerned with talent management are canvassed. Finally, a comparison is drawn between traditional talent management practices and more modern talent management practices.

2.2 Origin of the topic

Khan et al. (2013: 30) and Nijveld (2014:3) highlight the year 1990 as commencing the decade in which organisations first identified the importance of a structured approach to managing talent. The authors claim that in the 1990s organisations acknowledged talent management as a critical factor for organisational success, one that could be used to gain and sustain competitive advantage and prepare for future growth. Although John Lee (2012:3) claims that organisations had been doing what is known today as managing talent long before the 1990s, the term "talent management" was in fact introduced by McKinsey and Company in 1997, with specific reference to their original talent management practices and research. Interest in talent management (TM) increased considerably in the late 1990s when the phrase "war for talent" was coined (Horwitz & Budhwar, 2015:227). Since then, several factors have influenced the growth of the concept of TM, key among them is the increasing acknowledgement of the critical role that human talent and capability plays in the success of an organisation.

Silzer and Dowell (2010:8) remind us that in the early eras such as the 1980s and 1990s, many academics and organisations were sceptical about whether the concept would increase in importance. Their doubts were fast proven wrong. TM is now arguably one of the most important areas within an organisation and will only grow in importance as the world transforms. The war for talent is now a business reality for all and will continue to be so.

Organisations are consequently encouraged to revolutionise their approach to talent management to safeguard their sustainability and success.

2.3 International perspective: talent management

It will be instructive to canvass the views of international authors on the topic of talent management and its impact on an organisation's competitive advantage. International researchers such as Stahl et al. (2012) claim that one of the biggest challenges' organisations all over the world face is building and sustaining a strong talent pipeline. They assert that organisations aiming to compete globally need to redefine their talent management strategy. They need to ensure that the strategy includes the following principles:

Principle 1: Alignment with business strategy

Business strategies are commonly communicated in a three-year strategic plan. As a global competitor, the organisation needs to integrate the human capital plan so that it runs parallel with the business plan.

Principle 2: Management involvement

Organisations that thrive globally train their leaders to accept accountability for ensuring that their organisational unit has the right capability. HR acts as a support function and ensures the process is administered fairly. Creating this type of mindset is what sets successful global giants aside from their competitors.

Principle 3: Employer branding through differentiation

In order to attract a specific niche of talent, global organisations market the organisation to these targeted individuals, offering aspects that appeal to them and winning them over.

Principle 4: A balance of global and local talent

Organisations that remain internationally competitive ensure that their workforce encompasses local and global talent, resulting in a diverse talent pool (Stahl et al., 2012).

Next, it is important to understand the international shift in talent management. The concept of Knowledge economy shift is explained below.

2.3.1   Knowledge economy shift

Evans et al. (2011:260) explain the concept of knowledge economy. Historically, international organisations only viewed managerial and leadership positions as important in the talent management process. Individuals in these senior positions were viewed as key to the strategic success of the organisation.

Such organisations had a very restrictive view of talent management. Employees were identified as "talent" if:

- They had a direct impact on company strategy
- They held tacit knowledge and deep business experience
- They had a large scope of authority.

The authors note there has, however, been a vital shift in the paradigm. International organisations have become increasingly dependent on the skills of their employees. Employees who were once easily replaceable are now identified as talent because of their knowledge and specialised skill sets. Talent has become so important in the knowledge economy that organisations are obligated to invest where the talent actually lies, irrespective of job grade or title. Evans et al. (2011) attribute the shift to leading international organisations and influencers who drove awareness around the single most important global trend – "talent management for the future". Increasing numbers of international organisations have adopted this approach, understanding that a strategy is only as good as the people who are to execute it.

2.3.2   Importance of global talent management

Horwitz and Budhwar (2015:225) insist that global talent management continues to grow in strategic importance, and Leisy (2016:1) notes that it has become increasingly critical to an organisation's profitability. Organisations are obliged to invest in prime talent management strategies that contribute to economic growth. Amos et al. (2008:141) agree that it is the responsibility of an organisation to utilise its employees' skills and talents to maximise their contribution to the "bottom line" and competitive advantage.

According to, Vaiman,Sparrow, Schuler & Collings (2019:4) factors such as demographics, the economic, education and political conditions of a country can systematically be developed by government and non-government organisations for the purpose of enhancing the quality and quantity of the talent that the country attracts and utilises for long term advantage.

The authors explain Global talent management yields advantages, which includes a cross boarder flow of talent, high levels of mobility and productivity and a link to innovative people and practices across the border. However, a drawback can be the complexity that comes along with managing talent across different countries and regions. Nonetheless, recommends countries and organisations at large invest in understanding how managing international talent can ultimately benefit their societies and citizens.

South Africa is no exception, the country has fast recognised talent as a competitive asset in achieving business objectives. Organisations within the country have made substantial

progress in adopting processes and programmes that attract, select, develop, engage and retain top talent.

2.4 National perspective: talent management in South Africa

By way of narrowing the focus to a South African context, an article by Subban (2016:2) quotes the South African Board for People Practices:

Talent Management is the proactive design and implementation of an integrated talent-driven organisational strategy directed to attracting, deploying, developing, retaining and optimising the appropriate talent requirements as identified in the workforce plan to ensure a sustainable organisation.

Subban (2016:3) asserts that talent management is viewed as a strategic practice in South Africa. The South African HR community should therefore scan both the external and internal environments in which it operates and strategise accordingly.

Subban (2016:4) observes that currently, South African organisations are experiencing economic instability. Among the challenges that South African organisations are faced with are a mismatch between youth entering the employment market and the job opportunities available to them, increasing unemployment in the active population, and a volatile economic environment. Yet Grobler and Diedericks (2009:1) maintain that South African organisations have nevertheless been making large strides in the field of talent management. Most South African organisations recognise and embrace the concept of talent management, to the extent that it has become a standard HR practice within organisations. Organisations have realised the competitive advantage to be gained from managing talent effectively.

John Lee (2011:4) reminds us that while organisations in South Africa have always been formed, driven and sustained by people, the way in which South African businesses now approach people management is substantially different from how it was done when the businesses were first formed. The author argues that modern business history in South Africa manifests a trajectory in terms of which emphasis is now placed on employees as trusted and valued partners.

Meyer (2017) voices an opposing view. Top talent management professor at North West University, Professor Nicolene Barkuizen, argues that the state of talent management in South Africa still leaves a lot to be desired. South Africa has a challenging road ahead in terms of the consistent application of talent management in the South African workplace. Many organisations have yet to commit to putting talent management at the centre of their people management practices. Meyer (2017) nevertheless defends the arguments of John Lee (2011:4) and Grobler and Diedericks (2009:1), acknowledging that there are several leading

South African organisations that have profited from introducing modern talent management strategies.

Meyer (2017) urges South African universities and organisations to prioritise the subject of talent management and actively pursue a path that aims for excellence in the practice of talent management. In 2017, the CEO of the SA Board for People Practice and Vice-Chairperson of the UNISA Talent Advisory Board, Meyer (2017) calls for action from universities and organisations nationally. He also, appeals to these institutions to begin the journey towards achieving sustainable success through the practice of talent management.

2.4.1   Scarce skills in South Africa

The Department of Labour (2008) reported that every two years the Department of Higher Education and Training releases a list of occupations that are high in scarcity. The list enables South African businesses to plan recruitment and selection strategies, developmental plans and resource allocation to acquire individuals who possess scarce skills.

Snell (2014) and Capazario and Venter (2020:46) categorise the following as scarce skills occupations in South Africa:
1. Electrical Engineer
2. Civil Engineer
3. Mechanical Engineer
4. Application Development Manager
5. Programme or Project Manager
6. Finance Manager
7. Physical and Engineering Science Technicians
8. Industrial and Production Engineers
9. Information Systems Director
10. Chemical Engineer

But since the organisation under study is in the financial industry, we move next to exploring what skills and occupations are considered scarce within the financial industry.

2.4.2   Scarce skills in the South African financial industry

Terblanche (2008) reports that the financial industry still faces demand and supply issues regarding scarce skills. Actuarial, Accountancy and Auditing skills are still considered scarce skills within the sector. The demand is attributed to economic development in the services sector, yet a poorly educated workforce limits the availability of skills.

Recently in the FASSET sector skills plan (2020:16) of the Finance and Accounting Services Sector Education and Training (FASSET), which provides research-based information to Sector Education and Training Authority (SETA), there is a discussion of what the key change drivers are within the finance and accounting sector. A pivotal concern is that young tech-savvy talent within the industry is often attracted to the high-tech companies, leaving more traditional, institutional firms to outsource talent to develop their technological and digital capability.

2.5 Organisational view: talent management

This next section discusses scarce skills in relation to the concept of talent management at the organisation at which the study was conducted.

2.5.1 Scarce skills at the relevant organisation

On a journey to accelerate their digital transformation to a more customer-centric organisation, the insurance company requires a host of new skills and knowledge. These skills are in high demand within the market and people who have the skills are extremely scarce.
The following modern skills required within the organisation is discussed below:

- **Digital marketing and customer engagement**

A Digital Director the digital and e-commerce environment. He explained that there are numerous opportunities within large corporate organisations and agencies alike; however, the number of suitable candidates is comparatively low (Burke, 2015). Mackay and Livsey (2006:68) and Burke (2015) list some of the scarce skills and roles in the digital realm. These roles are critical to a large organisation such as Old Mutual, which aims to reach its technologically advanced clients via online interaction. They include:
- SEO Specialist – Search Engine Optimisation. Individuals who own the technical skills of ensuring an organisation has a web footprint.
- PPC Specialist – Pay per Click specialists focus predominately on attracting traffic to the organisation's website. These individuals require strong strategic and mathematical skills, with a well-founded flair for Google Adwords and Google Analytics
- UX Designers and Developers – User Experience (UX) designers are highly sought after. These individuals are responsible for creating the look and feel of an organisation's mobile applications and websites. Generally, a prerequisite for these roles is the ability to utilise programs such as HTML, Java script and CSS.

Organisations that can retain individuals who are skilled across multiple platforms are at an advantage. Individuals who can utilise both traditional and digital platforms are rare. Another challenge within the insurance company is the scarcity of strong Digital leadership. For leadership positions, larger organisations insist on a formal qualification, a list of tangible

achievements, online portfolios of work, prior team mentorship and a breadth of experience. Yet, many individuals with the appropriate extent and level of experience lack the formal qualification, and this almost forces a traditional organisation such as the one under study to re-evaluate its criteria against the requirements of the business.

In addition, the insurance company prides itself on providing opportunities for employment equity candidates, yet not many South African EE candidates meet the requirements and those that do are in huge demand. Mayar and Ramsey (2011:3) and Dean (2015) claim that organisations, small and large alike, require a bulletproof digital strategy to realise maximum return on investment. The authors accentuate the importance of formulating a team with the right skill set.

- **Cybersecurity**

The organisation under study regards savings, investment and asset management as its core business and for that reason it has to secure its information assets. Regrettably, as Blue (2014) reports, "there is a severe and worsening shortage of information security professionals". The main reason is that the digital environment has grown inconceivably rapidly. Blue (2014) explains that organisations will have trouble in finding suitable candidates as the work requires experience in emerging disciplines and programmes such as

- Forensics
- Virtualisation and Cloud
- Malware Detection and Mitigation.

Additionally, the cybersecurity profession is relatively unversed, which often translates into minimal numbers of candidates being available with the right amount of experience required for the relevant roles. Moreover, often an organisation's recruitment governance allows only for the employment of individuals who possess a formal qualification, lessening the likelihood of recruiting an individual with appropriate experience. Blue (2014) explains that cybersecurity has become a scarce skill as many prospective employees may possess an IT qualification but lack the ability and experience to safeguard the organisation in practice.

For a financial organisation such as the one under study, it is obligatory to protect the confidentiality and integrity of its data. Should the organisation fail to do so, it may face profit loss, legal liability and/or loss of investor confidence. (Van Remoortel, 2016). This underlines the importance of employing and retaining individuals with this scarce skill set.

- **IT architecture**

IT architecture can be described as a set of policies and principles, common solutions and services that guide the organisation's information technology practices. Krafzig et al. (2005:4)

explain that the role of an IT architect is to guide the process of planning, acquiring, building, modifying, interfacing and deploying the IT resources within the organisation. While the organisation under study is making strides towards becoming technologically advanced, in order to accomplish this, it needs to engage individuals who possess skill sets that relate to building IT landscapes.

Two key roles within IT architecture are those of Enterprise and Solution Architect. An Enterprise Architect is responsible for defining and monitoring adherence to architectural standards for the development, deployment and management of applications, information and technology infrastructure. A Solutions architect, on the other hand, is responsible for driving the development of technology solutions to meet business requirements. The Solutions architect maps technical and system requirements and ensures that they are in line with the enterprise's overall architectural plan

In brief, IT Architecture is the process of aligning the business's strategic vision with its information technology. Employees who hold the skills play a crucial role in defining and standardising the organisation's technology, data and business processes, to create a more seamless customer or end-user experience. Those who have these skills are considered scarce and are highly valued since they ensure that the organisation's technology and platforms are agile and able to adapt to any new market or legislative changes that may impact the business.

- **Programme management**

Pellegrinelli et al. (2007:42) argue that programme management has become an increasingly sought-after skill. When organisations inaugurate internal change, its implementation requires the use of various programmes. Against the backdrop of one of its largest digital transformation programmes, the organisation under study is thriving on change yet requires the correct individuals to introduce and embed the new way of thinking and working.

Pellegrinelli et al. (2007) describe a programme manager as an individual responsible for delivering change through the effective coordination of the programme's projects and the risks and issues that may arise. These individuals are extremely scarce since they are responsible for the effective planning and design of the programme, and for monitoring its progress in terms of its objectives. Programme managers are exclusively responsible for managing the programme's budget, facilitating the appointment of individuals to work on specific project releases and ensuring the delivery of new projects and services from the relevant projects. They are regarded as scarce, as they are required to have proven experience in executing major programmes successfully from start to finish. In addition, these individuals require the skill of effective leadership, interpersonal skills, sound technical skills and the ability to manage

large financial budgets. All of the above are required to manage the sort of large-scale projects that are common in a large organisation such as the insurance company under study. It is imperative that the organisation under study recognises the pressing need to attract and retain individuals with these newly-identified, scarce skill sets described above.

2.6 Epistemological and ontological grounds

In scholarly research, the term paradigm is characterised by Kivunjai and Kunyini (2017:26) as synonymous with the worldview a researcher brings to bear on the subject of the research. A researcher's paradigm identifies his or her perspective and way of thinking and may include shared beliefs or thought processes. These factors then translate into how the researcher will analyse and interpret the research data.

The choice of paradigm has a significant influence on the choice of methodology and data collection too, and on how the researcher derives meaning from the data gathered.

This research paradigm of this study is grounded in the following epistemological and ontological assumptions:

Table 2.6.1: Epistemological and ontological factors

Aspect	Definition	Application to research study
Epistemological Ground	Epistemology describes how we come to know something. It centres on how knowledge is acquired and how the knowledge can be transferred to others	During the process of gathering information from various scholars and researchers, it became evident that the approach to be adopted is that of epistemologically empirical. This approach is appropriate as it allows the researcher to emphasise gathering knowledge from objective facts and the demonstrable experiences of participants
Ontological Ground	Ontology is concerned with whether the research makes sense and if it is real	For this study, the researcher will orientate thinking around the reality of the problem identified, based on feedback and engagement around the problem. This reality then guides the researcher to believe that an investigation into the cause of the problem is required

Next, we explore concepts linked directly to the context of the research problem.

2.7 Context to the problem

As mentioned previously, the insurance company is on a journey to accelerate its digital transformation and in doing so, requires a host of new technology and people practices. To ensure that such a transition is successful, Gartner (2019:43) recommends that leaders completely re-think their way of working. In doing so, it is crucial to establish whether the workforce is able and willing to embrace a potentially disruptive transformation in the workplace.

As a point of departure, organisations and leaders need to ensure that the current workforce understands the drivers of the change and related concepts. Organisations are responsible for embarking on the digital transformation journey with their employees. In doing so, they should ensure that employees understand concepts such as innovation, new ways of work and agile organisations. Hence, topics that are instrumental in making the shift necessary and justify why the talent management process requires modification are explored below.

2.7.1   The fourth industrial revolution

Earlier it was stated that the study is driven by strategic and operational needs within the organisation. Strategically, the insurance company is undergoing major digital transformation. One of the core purposes is to enable it to capitalise on emerging technologies that will equip it to service an increasingly large digital community. Undergoing the digital transformation is thus crucial to the sustainability of the organisation. In order to understand why the change is critical, it is important to identify key drivers of the change. These include the fourth industrial revolution and an agile work environment.

Founder and Chairman of the World Economic Forum, Klaus Shwab, came up with the concept of the fourth industrial revolution. The revolution ushers in a world where individuals move between digital domains and utilise technologies to enable and manage their lives and workplaces. The previous industrial revolutions are generally viewed as separate events. Xu (2018:90) provides a concise outline:

- Revolution 1 shifted the economy from a handicraft economy to a machine and manufacturing one
- Revolution 2 utilised oil and electricity to facilitate mass production
- Revolution 3 capitalised on technology to automate production and service.

The fourth industrial revolution can be seen as a culmination of the above, and more. The effect on businesses will be profound. This industrial revolution will force organisations to re-examine the status quo and become persistently innovative in order to stay relevant. Mkhwanazi (2018:2) characterises the fourth industrial revolution as comprising different

flavours of technology: in this era, artificial intelligence, cloud computing and analytics will be blended to support our ever-evolving organisations. Xu (2018:90) adds that the fourth industrial revolution will change how we live, work and communicate. The revolution aims to re-shape how government and commerce operate, through deeper integration of technology into organisations and societies (Reiche, 2019). There will be progress in the fields of artificial intelligence and quantum computing, while robotics will act as a catalyst. The revolution will fundamentally shift the speed, scope and impact of change within an organisational context. While previous revolutions are categorised as linear, the fourth industrial revolution expands exponentially.

The fourth revolution gives rise to automation, which will have an impact on an organisation's level of effectiveness. The digital revolution can liberate employees from automatable tasks (Mkhwanazi, 2018:4). This affords scarce-skilled employees the opportunity to address more complex tasks or engage in more innovative work. Furthermore, it creates an environment in which scarce-skilled employees are granted access to advanced tools and insights, allowing them to seek leading-edge solutions to previously intractable problems.

Xu (2018:94) argues for the opportunities that the fourth industrial revolution will bring about for scarce- and critical-skilled employees. The revolution will spark such disruption that organisations will be forced to utilise talent differently. New-age skill sets such as cybersecurity, robotics and data science will become sought-after skills in the market. Organisations will be obligated to manage talent effectively to capitalise on the technology to drive an improved customer service experience and product quality.

The insurance company that is the subject of this study does not deny that the organisation is being challenged by the fourth industrial revolution. Indeed, its leadership has embraced the concept as an inevitable consequence of the digital era. Some understanding of the implications of this era for an organisation such as this insurance company is necessary.

2.7.2 The digital era

As previously noted in the explanation of the problem statement, the organisation under study is currently working hard towards operating in the digital arena. This requires that it takes on board a host of new scarce skills to ensure that the company is on a par with competitors in the market. Martin (2018:4) lists the following as the key digital activities that organisations are engaging in:

- Managing enterprise-wide data architecture and data infrastructure
- Identifying cutting-edge or innovative technologies for the business
- Leading design of e-commerce and online experience

- Leading digital transformations across the business
- Automating business processes (e.g., robotic process automation, smart workflows, cognitive agents)
- Developing analytics use cases for insight generation.

Martin (2018:2) argues that with the rapid advances in digitalisation, organisations are faced with a dual mandate. On the one hand, the organisation is forced to innovate at breakneck speed to ensure digitally savvy processes and product offerings. On the other hand, it has to ensure that core task and business-as-usual activities are effectively managed. The change brings about an improved level of productivity, but it also augments lives in a significant manner (Brown et al., 2018:30): employees are being saved from menial jobs as artificial intelligence automates routine tasks. This is both a good and a bad thing. While the majority of researchers advocate digitisation, Reiche (2019) argues that there are also negative effects cascading from the fourth industrial revolution, especially its impact on lower-skilled employees. An unrelenting drive to introduce cost-effective automation will inevitably disrupt the lower-skilled labour workforce. First, fewer resources will be required to perform tasks. Secondly, from a benefit and reward perspective, lower-skilled employees will experience benefit stagnation, since their skill sets are no longer required or a top priority to reward and retain. While it is thus inevitable that artificial intelligence and robotics will transform jobs within organisations, many employees who lack the necessary aptitude, skills or knowledge will be disadvantaged by the fourth industrial revolution.

To address this situation, Brown et al. (2018:31) advise organisations to use their existing workforce and train people for the jobs of tomorrow. Lifelong learning, career reinvention and talent development will become critical in managing the existing workforce for the digital era. Bravery et al. (2018:22) challenge HR to shift the paradigm from "managing a pipeline of talent" to creating a platform of developing skills to meet current and future needs. Sooner or later, organisations will be forced to offer alternatives. If they aim to be relevant in the future, they will need to implement talent management strategies and structures that are as flexible as their own strategies and structures (Bravery et al., 2018:23).

HR will be challenged to innovate the talent management proposition. The core emphasis will shift to HR creating healthy pools of employees who are skilled, capable and nurtured. These individuals are required to be deployed into the organisation to add real-time value in their roles. HR is being challenged to become more innovative and flexible, specifically as the organisation moves into an agile environment. The concept of an agile environment is explained below, in a way that outlines the landscape in which the selected insurance company aims to operate.

2.7.3   Agile organisations

According to Martin (2018:6), top-performing organisations attribute their success to their investment in adopting and embracing the "agile" methodology. Koene et al. (2018:9) introduce the agile methodology as a change execution that injects innovation and decreases time to market. The methodology is founded on reducing the costs and risks associated with the service or product delivery process. As the world grows more complex, organisations that adopt an agile approach are far better equipped for the future (De Smet et al., 2018:5). As a fierce competitor in the world of work, De Smet et al, 2018:5 recommend that the organisation under study should adopt the following laws to move into an agile working environment.

2.7.3.1 Five laws of agility

Law 1: Implement an organisational structure that represents a network of high-performing teams. Teams should be self-organised and enabled to work autonomously. They should be organised according to their contribution to an objective.
Law 2: Implement a short-cycled, lean planning and decision-making eco-system. Teams are to work at the same agreed pace and follow an incremental iterative approach to delivery.
Law 3: Introduce and embed a culture of client-centricity. Embed a culture of continuous improvement in service and product offerings to the end customer.
Law 4: Drive an improved IT and digital service capability. Invest in building IT and digital software, platforms, infrastructure and people capability.
Law 5: Mirror servant leadership within the organisation. Ensure leaders have a compelling vision for empowering their teams to deliver against set objectives. Leaders should showcase a strong inclination to service the employees, clients and supporting stakeholders.

A company that adopts the agile methodology actively analyses the world, its market and its customers. The company restructures and flattens the hierarchical structure to encourage and foster collaboration across levels and disciplines. Innovation is pivotal. Employees, contractors and suppliers are tasked daily to innovate and digitalise to improve the customer offering or experience.

Martin (2018:6) argues that organisations that adopt the agile methodology are twice as likely as their peers to remain leaders within their industry. Organisations that opt for agility embrace more proactive change in their operating models, delivery models and use of technology. These organisations make significant changes to their underlying architecture to promote agility.

Agile organisations have a sharper focus on improving talent management strategies. Leaders actively participate in each phase of the talent management process. They show active involvement from the workforce planning stage to retaining the top talent. Such organisations are transparent about the obstacles faced in their talent management practices. The most common hindrance is the skills gap. With digital transformation, newly identified skill sets are required, and these are often extremely rare and radically priced. Given the shortfalls in traditional talent management practices, agile organisations view this as a major deterrent to their overall performance.

2.8 Evolving Human Resources

Martin (2018:1) claims that to thrive in the digital era, the HR function will have to make meaningful changes, especially to its workforce. In order to support a digital organisation, HR needs to embrace technological and operating-model changes. These changes may include adopting agile HR practices, with a strategic focus on managing talent within the organisation. As a point of departure, Subban (2016:8) provides a list of recommendations to help organisations to improve their HR services:

- Introduce Cloud-based technology that offers user-friendly HR systems
- Introduce the use of HR Analytics as a decision factor
- Emphasise leadership development
- Revolutionise corporate learning and adopt new learning models.

Since the HR function is the driver and custodian of the talent management strategy, it is imperative that HR uses the above as a catalyst in refining the current talent management strategy and their own HR practitioners who drive the strategy. Martin (2018:2) suggests that organisations will have to recognise and accept that many of the current HR workforce will need to be retrained, retaught or replaced soon.

Besides the remodelling of IT and digital organisation, the relevant support functions in HR also need to embrace the agile methodology (Koene et al., 2018:88). Ultimately, the efficiency of the future HR team will depend on whether the team can design and implement people practices that result in long-term success for the organisation.

2.9 Human Resources leadership transformation

Another aspect of an evolving HR team is its leadership. HR leaders are required to evolve and understand the shift from a traditional to an agile organisation. They are required to commit to introducing and embedding an organisational culture that welcomes digital activities and enhancements. Leaders who adopt this approach possess the mental ability to think and

understand swiftly. These leaders use every opportunity to reflect consciously and encourage teams to recover quickly from mistakes (Hosking, 2018: 13).

In the past, HR leadership was largely modelled on military leadership. The leader set the strategy and implemented a structural hierarchy that created a large power gap between the leaders and the rest of the HR team. Hosking (2018: 47) argues for a new breed of leaders who are not afraid to unlearn old ways and learn new ways. HR leaders are powerful and influential figures within a transforming organisation. The role of these leaders is essentially revolutionary. In the new world of work, these leaders are responsible for ensuring that the executive board has a clear view of the direct connection between people and business performance (Brown et al. 2018:18).

2.10 Key drivers for change in talent management

Subban (2016:9) proposes two main reasons why the management practice has to change in South African organisations.

1. Fourth industrial revolution:

   With the growth in artificial intelligence, robotics, machine learning and genetics, there will be an unavoidable disruption in how the workforce is managed. With smart systems and robots entering the workplace, HR needs to align the talent management strategy in such a way that it capitalises on the existing workforce by upskilling or redeployment instead of pure substitution.

2. Business sustainability:

   To ensure business continuity and sustainability, the organisation needs to shift to operating optimally in the digital realm. In order to do so, the talent management strategy needs to focus on attracting individuals in the fields of:

   - Mathematics
   - Engineering
   - Computer Science
   - Architecture

It is believed that these individuals will play critical roles in the future, assisting organisations to manage the disruptions of technology. However, these skill sets are very rare within the South African market and therefore modern talent management practices are required to attract and retain these top talented individuals. It is consequently evident that the insurance company under study has to change its current talent management process to secure business longevity and sustainability.

De Smet et al. (2018:9) suggest that the best way to achieve this is to ensure that the HR team transforms as quickly as the IT and digital aspects of the business. It is vital that the HR community transform its mindset from a traditional approach to a modern, agile one. It is assumed that the HR community will adopt processes and practices that are client-centric (De Smet et al., 2018). Koene et al. (2018:76) add that the organisation must also be employee-centric, with a key mandate for empowering employees. The HR team will focus time and energy on creating a reality in which the business receives proactive support and enablement with people practices. The most successful HR teams know that having the best people is not a simple ideal, but rather a competitive necessity and one of the true differentiators that distinguish top-performing organisations from the masses.

2.11 Key theories and concepts of talent management

The most valuable part of an organisation is its employees. Employees offer their unique skill sets and capabilities to drive competitive advantage for the organisation. It is up to the HR function to manage the talent of employees.

Numerous authors provide insight into the phases most often found in talent management practice. These may differ according to the size or complexity of the organisation, but typically comprise those listed below. The insurance company that is the subject of this study has over 9 000 employees, but their HR division subscribes to the following phases in their talent management processes.

2.11.1 Phases of talent management

Attraction and branding

Sirin (2018) declares that employer branding is extremely important, showcasing what the organisation can offer as an employer of choice. Employer branding focuses on executing media campaigns that educate, excite, attract and capture the attention of potential employees. It evokes what the entire employment experience would encompass. Tutorials Point (2016) adds that organisations with a positive image in the market can more easily attract competent employees.

Recruitment

Gusdorf (2008:7) describes recruitment as the process of attracting individuals with the appropriate qualifications and skills to apply for jobs within an organisation. He proposes that, when embarking on the recruitment process, a business should choose between internal and external recruitment activities. Internal recruitment involves choosing an existing employee to fill a new role via an internal, promotion or progression process. The promotion and progression process is used as a motivation tool and reward for existing employees who have

added significant value and may be ready to move to working at a higher level. On the other hand, external recruitment occurs when the organisation decides to generate a list of suitably qualified and skilled individuals external to the organisation. External advertisements, private recruitment agencies or targeted headhunting are a few of the strategies available to the organisation.

The recruitment process must comply with all legal requirements. Organisations worldwide are required to comply with legislative requirements that impact the hiring process. Such Acts or regulations may prohibit certain practices, provide laws around practices or prescribe minimum governance. Within a South African context, the following legislation impacts an organisation's recruitment processes.

- The Employment Equity Act [EEA]

The purpose of this Act (South Africa, 1998:12) is to eliminate unfair discrimination by promoting equal opportunity and equity in the workplace. It makes provision for affirmative action measures to redress the employment disadvantages experienced by designated groups and seeks to ensure that an organisation has equitable representation in all occupational categories and at all levels. The Act directly impacts South African organisations as it prohibits unfair treatment or discrimination, directly or indirectly through employment policy or practice, on the grounds of race, gender, disability and sexual orientation.

- Basic Conditions of Employment Act [BCEA]

The BCEA (South Africa, 1997:7) gives effect to the right to fair labour practices. The Act regulates the basic conditions upon which employment can be offered. It directly impacts South African organisations as contracts of employment need to be in line with the terms set out in the BCEA. The BCEA sets out minimum criteria regarding aspects of employment such as working hours, overtime, sick leave and severance pay.

- Labour relations Act [LRA]

The Labour Relations Act (South Africa, 1995:1) governs the negotiation of wages and terms and conditions of employment. It seeks to ensure that South African organisations adhere to matters of mutual interest appropriately, especially during a recruitment and selection process.

Selection

The process of choosing the most suitable individual from a group of applicants is referred to as selection. After the standard recruitment process, organisations try to make sure they are making the correct choice of candidate by using additional selection tools which include:

- Assessment centres

  For senior-level positions, assessment centres or tasks are popular. The process involved consists of a half-day or full-day event with several structured assessment activities, designed to test the individual's suitability for the position.

- Presentations

  Presentations are well suited to finding out if the candidate has the required skill set to do the job, e.g., communication skills or conflict management skills.

- Psychometric assessments

  Psychometric assessments test an individual's reasoning abilities and behavioural responses. They may also measure numerical aptitude and verbal reasoning.

Ireland (2013:15) suggests that to select the successful candidate in a consistently fair way, organisations make use of a selection matrix or set of criteria and apply it consistently.

Learning and Development

Stewart and Rigg (2011:20) describe learning and development (L&D) as deliberate interventions that support or stimulate knowledge, education and skills among individuals or groups. L&D may consist of acquiring new knowledge, inducing behavioural change or implementing process improvements. The field of learning and development comprises a variety of activities, including formal education, accelerated graduate programmes, leadership development and action learning.

When embarking on learning or training initiatives, organisations must identify the objectives of the learning and who the targeted participants are (Stewart & Rigg, 2011:19; Evans et al., 2011:328). Identifying and assessing potential is a crucial step in the L&D process. Organisations and management should invest in ensuring early visibility for employees with a high level of potential and recommend the correct L&D initiatives to create future leaders and successors within the organisation (Evans et al., 2011:324).

Engagement

Symanowitz and Bussin (2016:5) characterise employee engagement as the emotional and functional commitment an employee has to his or her organisation. The term is often used to describe the level of enthusiasm and dedication an employee evinces toward his/her organisation. Key drivers of employee engagement include organisational values, pay, career and growth opportunities, and the correct management of performance and leadership.

Measuring engagement levels has fast become popular among HR specialists. It allows the organisation to understand the likelihood of an employee's exiting the organisation. Abbott (2014: 2) adds that engagement also acts as an outcome indicator, providing evidence of the

organisation's climate and the effectiveness of various processes within the organisation. While it is impossible for an organisation to meet every need of every employee, employers are advised to implement an engagement survey and strengthen the employee value proposition (EVP) to encourage a higher level of engagement from employees (Symanowitz & Bussin, 2016:32).

Reward and recognition

The South African Board for People Practices, (2017) describes reward as the strategy that enables organisations to offer appropriate and fair levels of benefits and pay for achieving agreed deliverables in line with organisational objectives. Recognition is a related strategy that seeks to reward employees through mechanisms outside the benefits and pay model. Reward and recognition are extremely important as they play a key role in the attraction and retention of employees. In order to offer competitive rewards, Bussin (2017:7) recommends that organisations make use of market surveys:

- To benchmark the organisation's rates of remuneration against external equity, ensuring the organisation is paying at a level consistent with the market trends for a skill set. The organisation can create pay scales that suit the organisational grades and levels within the organisation
- To allow the organisation to set entry rates for entry levels jobs
- To allow the organisation to identify positions that need to be paid differently
- To ensure that the organisation aligns in respect of percentage increases per annum
- To ensure that the organisation remains relevant and on a par with competitors in the same market, searching for the same skill sets.

There are various factors concerning reward that organisations in the South African market need to consider, such as the Total Guaranteed Package (TGP), Variable Pay (VP), Short Term Incentives (STI) and Long-Term Incentives (LTI). Rewards and recognition register the fact that employees are appreciated, respected and esteemed for how they contribute to the organisation's achieving its objectives. It is therefore crucial for the organisation to ensure that it offers competitive rewards and recognition.

Retention

Employee retention is concerned with encouraging employees to remain with an organisation for a maximum period, to help meet operational and organisational objectives. The organisation should create and foster an environment that encourages this, making use of available retention techniques (Kossivi et al., 2016:3). The corollary of retention is employee turnover, the number of individuals who vacate positions within an organisation. A grave concern for contemporary organisations is the impact on prosperity and competitiveness

should key individuals leave voluntarily. These individuals ultimately leave with valuable knowledge, both tangible and intangible (Khoele & Daya, 2014:10). Khoele and Daya (2014:10) list the following as factors that contribute to turnover:

- Industry conditions
- Personal factors
- Employee wellbeing
- Lack of an inclusive environment
- Barriers to advancement, development and promotion.

To minimise turnover and its impact, Kossivi et al. (2016:6) recommend that organisations utilise the following standard retention mechanisms to keep staff motivated to remain with the organisation and continue to add value:

- Compensation: Competitive pay strongly correlates with an employee's decision to stay within an organisation, so an organisation that offers competitive pay and extrinsic rewards may prompt an employee to remain
- Training and development: Relevant training and development can be utilised as a retention factor. Employees are likely to remain with an organisation that invests in their learning, development and overall growth
- Autonomy: An increased level of autonomy motivates employees to remain with an organisation as they gain a significant degree of control over how and why they complete their assigned tasks
- Work/life balance: Employees value an organisation that allows for a work/life balance. Organisations that offer flexible work schedules and allow employees to take care of themselves both professionally and personally are more inclined to retain motivated and engaged employees.

The need for an organisation to retain talent is crucial as it has a direct impact on business sustainability and competitiveness. It is therefore in the organisation's best interests to invest in structured retention mechanisms and strategies.

The chosen approaches and models are strongly aligned with what is expected of an agile organisation. Since the insurance company that is the subject of this study is on a digital acceleration journey, it should be receptive towards the modern models described below.

2.11.2 ARRR talent management model

As discussed above, organisations moving toward agility require all supporting functions to adopt the methodology. Van Vulpen (2018) states that HR within an organisation needs to leverage off business units such as IT, Digital and Data and Marketing, who are recognised as the leaders in adopting and implementing the methodology. Van Vulpen (2018) introduces a

talent management model that is derived from a marketing model aimed at attracting and retaining customers. The model encourages organisations and HR to think about employees as internal customers. Below is a visual depiction of the Marketing Model, followed by its application to talent management within an organisation
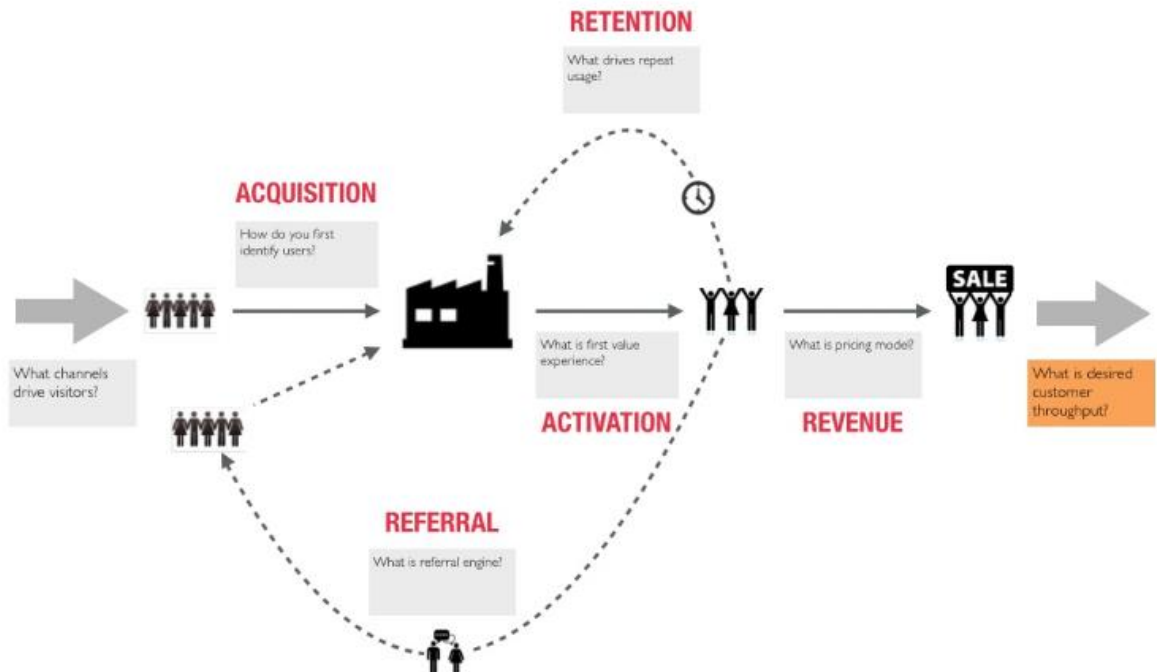
Figure 2.11.2:1 ARRR talent management model

Van Vulpen (2018) describes this as the AARRR model:

- Acquisition – Focused on luring customers to the business
- Activation – The first value experience that is exchanged between the business and the customer
- Revenue – The focus on getting the customer to make a purchasing decision and thus contribute to the profitability of the business
- Referral – Use of the existing customer base to market the business to other customers
- Retention – Focus on retaining loyal customers.

Van Vulpen's (2018) model can be applied to talent management. The model encourages organisations to view their employees as internal customers and adopt the same client-centric view when managing their talent pool.
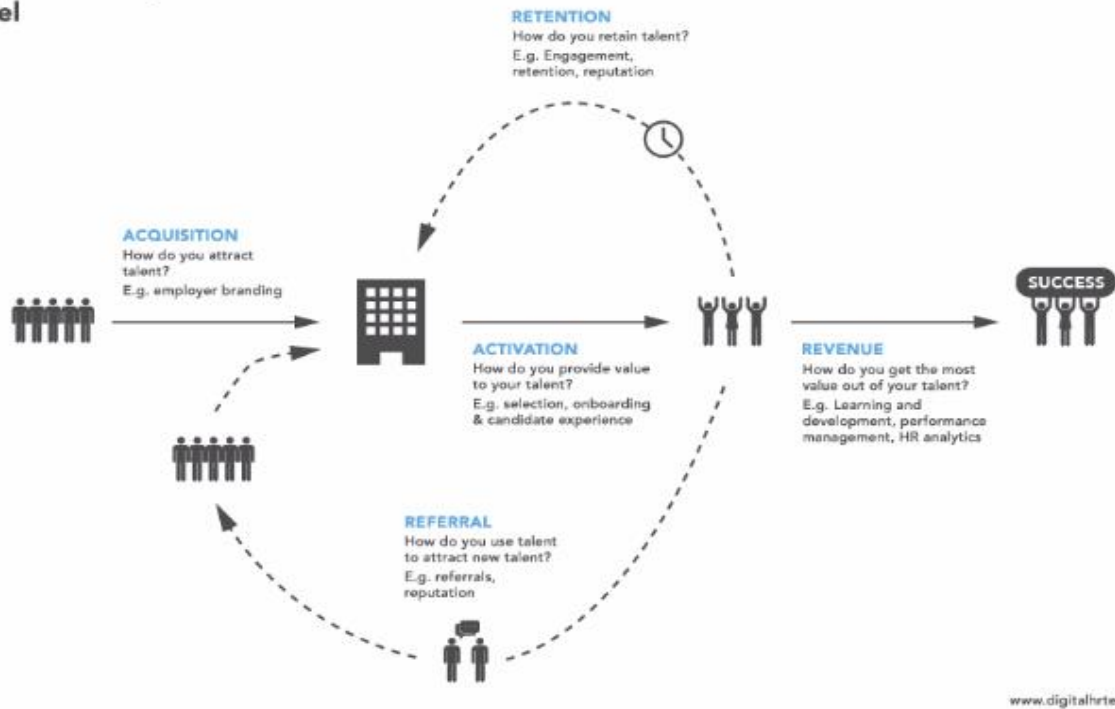
Figure 2.11.2:2 ARRR HR talent management model

- Acquisition – Organisations utilise employer branding to attract potential candidates to the organisation. The organisation creates a presence in the external market and concentrates on becoming an appealing employer of choice.

- Activation – Activation includes selection, candidate experience and getting the talented employees onboarded. During this stage, the organisation concentrates on ensuring that prospective employees have the best candidate experience, irrespective of whether they are successful or not. Additionally, when a selection has been made, the organisation commits to ensuring that the candidate experiences the most seamless onboarding process.

- Revenue – Revenue from employees refers to their productivity levels and ultimate contribution to the profitability and competitive advantage of the organisation. During this stage, the organisation commits to learning, development and applying effective performance management so that employees can make a valuable contribution.

- Referral – Referral has to do with building and expanding brand reputation. Organisations are urged to use existing employees to expand the employee base. They should create an employee referral programme whereby employees become brand champions. These brand champions lure other talented individuals to the organisation.

- Retention – This focuses on doing everything to retain top talent. Emphasis should be placed on competitive compensation, non-financial rewards and recognition.

Since an agile environment is largely associated with fast-paced working environments such as IT, Digital, Data and Marketing, this model is a prime example of how an organisation such as this insurance company can leverage off internal department models and customise them to suit the new ways of work within the HR department. Campbell and Hirish (2013) recognise the importance of talent management in an organisation, a four-step approach for organisations to use to develop and implement their talent management strategy. The four steps are explained in detail below.

2.11.3 The four-step approach to talent management

A visual representation of Campbell and Hirish's (2013:15) four-step approach to talent management appears below:

Figure 2.11.3:1 The four-step approach to talent management

The four-step approach is used to guide organisations when they are shaping their talent management strategy or approach. The four key steps represent the fundamental questions and choices the organisation is required to face to develop its talent management strategy.

As mentioned earlier in the background to the study, the insurance company concerned was ranked the top employer in the financial services industry for 7 consecutive years. This was

largely attributed to its people practices. Currently, the organisation has a well-defined talent management process. But with the organisation aiming to operate in the digital arena and adopt an agile culture, it has to start searching for ways in which to redefine and modernise its process. The following explanation provides insight into the model depicted above that the insurance company can consider using.

Definition

At this stage, the organisation focuses on defining what talent management means for it by identifying the business drivers within the organisation. The organisation then chooses between inclusive and exclusive talent management strategies. Inclusive is defined by the phrase "all our people are talent". At this end of the spectrum, the organisation works on the premise that "everyone has talent". All employees are provided with an equal opportunity to engage in learning and development initiatives. The organisation invests in personal development plans for all employees.

Exclusive talent management, on the other hand, centres on identifying a certain group of employees, usually high potential employees. These high potential employees are those who are considered to have the potential to deliver against objectives and grow in line with the strategic direction of the organisation. The organisation then offers accelerated development and growth opportunities for these employees. Subban (2016:5) uses the diagram reproduced below to show how the executive team needs to decide on which approach to use as a starting point in making strategic decisions regarding talent management.

Figure 2.11.3:2 Inclusive or exclusive talent management strategy

Once the organisation has decided which approach to adopt, the emphasis shifts to identifying the key drivers for managing talent in the organisation.

- Business strategy – the organisation considers how to align its TM strategy with its business strategy. The talent management strategy needs to allow for the organisation to meet the business's immediate business and longer-term strategic objectives.
- Economic agenda – the economic environment in which the organisation operates is a key driver. In order to maintain a sustainable business, executive management decides to continue investing in people development.

Once the organisation has defined the drivers for talent management, a focus must be defined.

Focus

During this stage, the organisation identifies and selects the groups of people and jobs on which talent management is to be focused. The organisation decides on the specific populations to address with the talent management strategy. Crucial populations include:

- Critical and scarce individuals or roles – organisations are forced to recruit, develop and retain "hard to replace" people. If the organisation fails to invest in these roles or individuals, tangible business risks follow. Either operational requirements are not met, or strategic objectives will not materialise.
- Leadership development – equally important is the investment in leadership development, in terms of both attracting new leaders and building an internal pipeline of talent for managers and leaders of the future. The organisation may choose to invest in those at very senior levels in the organisation, ensuring their readiness for strategic positions such as director. Alternatively, an investment can be made in employees at an early stage in their management careers to develop them for more senior positions within the organisation.
- Graduates – The organisation may invest in a highly selective recruitment and development strategy targeted at the early career development of graduates who have spent years studying in fields that align with the organisation's strategic objectives.

Once the population has been identified, the organisation proceeds with creating the process of talent management.

Process

After an organisation has defined talent management and identified the population they wish to target, it has to establish a process of managing talent within the organisation. At this stage, the organisation spends some time defining the various concepts, processes and practices within talent management such as:

- Role profiling – a matrix to identify what skills are required for a role

- Talent grading system – a set of criteria used to establish how critical the type of skill/ individual is to the organisation
- Recruitment and selection process – the employer brand proposition and process followed to attract and select suitable candidates
- Assessment/development aid – the organisation can make use of internal management judgment or seek the assurance of external providers in the form of technical and psychometric assessments
- Performance management – an appraisal of progress against set objectives
- Retention mechanisms – strategies aimed at ensuring employees stay within the organisation.

Action

The previous steps culminate in the stage of action. At this stage, the organisation decides on how to resolve practical issues such as:

- What follows after an individual has been recognised as high potential or having potential for succession
- How the organisation links high potential employees to available jobs
- Devising retention strategies for those who are highly talented or hold a scarce and critical skill.

The organisation then decides to implement some or all the below:

- Personal development plan templates
- Developing talent programmes targeted at building leadership capacity and elite technical skills
- Professional group establishment and association – both internal and external to the organisation
- Job filling and deployment strategies – deciding on how to use advertising and managed job moves to fill the required role
- Use of succession pools and pipeline talent to fill internal vacancies
- Determining promotion and progression criteria
- Establishing relationships with training vendors and suppliers
- Establishing the use of HR metrics and analytics to track and monitor talent management-related activities
- Introduce employee engagement surveys
- Introduce an alumni network
- Introduce proactive movement and rotation of talent
- Establish reward and recognition criteria.

Once the organisation has shaped its talent management strategy or approach, it needs to implement it. To do so, it is imperative to understand who the key stakeholders are in the process.

2.12 Talent management stakeholders

After defining processes and practices, the organisation should communicate clear guidelines on the roles and responsibilities of all parties involved in the talent management process. As proposed by Campbell and Hirish (2013:21), the diagram below depicts key talent management responsibilities:
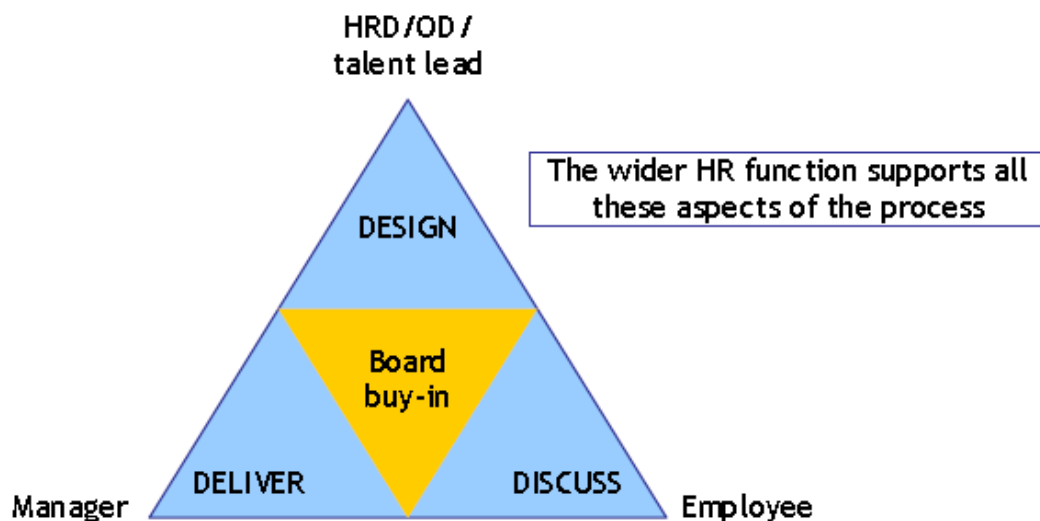
Figure 2.12:1 Talent management stakeholders

HRD, OD or talent lead

Commonly, the HRD together with the OD Team and talent lead would be responsible for aligning the talent management strategy with the delivery of the talent agenda. This team is ultimately accountable for driving the talent strategy and its implementation. The position of talent lead is commonly found in large organisations. This individual is accountable for identifying the strategic and functional focus for talent. The talent lead often collaborates with other centres of excellence such as learning and development, organisational development and leadership development, to assist with the design and implementation of the talent plan for a business.

Managers

Line managers and leaders play a pivotal role in the talent management process. They have a key role in identification, coaching, supporting and managing performance. Management commitment and capability is essential to the successful implementation of talent management processes. Managers should be able to use their interpersonal skills to inspire conversations

with employees around development: courageous conversations about performance and delivery, and honest discussions about opportunities for lateral and vertical growth.

Employees

Once an employee has been identified as talent, they too have a role in the talent management process:

- Employees are to take accountability for their development and growth within the organisation
- Employees are encouraged to talk about their interests and ambitions so managers and HR can align these with their development plans.
- Employees are to be prepared for formal monitoring of their development and succession readiness.

HR supports the full talent management process in an overarching way. Their role may include:

- Acting as an enabler in the process by supporting management
- Recommending the use of talent management tools to support the full process
- Acting as a link between business managers and the centres of excellence or talent leads
- Functioning as support and guidance in co-creating development plans and training initiatives.

Similarly, the board of directors and executive management have a role to play in the talent management process. Talent management is more likely to succeed when management displays the relevant commitment to the process.

To summarise, for organisations to be successful in introducing and implementing talent management within their organisation, it is imperative that they clearly communicate what they seek to achieve with the strategy and how they aim to do it. Moreover, as Koene et al. (2018:78) explain, for an organisation to become agile, a people- or human-based strategy is required. The human-based strategy should inspire people to contribute their full value.

HR is required to be the front runner in the process of change, supported by technological advances. HR's major focus is to design and build a people solution that enables the organisation to move to or operate in an agile state. The narrative for all HR communities is to drive a people strategy that focuses on the engagement and empowerment of employees. Agile organisations recognise that humans are their most valuable asset, and an organisation can only be agile if its people are agile.

To come to an appreciation of what this means, it will be useful to compare traditional talent management strategies with more modern talent management strategies. As previously

discussed, this issue is closely associated with the research problem in the chosen organisation.

2.13 Research problem variables

The section surveys the literature exploring the difference between traditional and modern talent management strategies.

2.13.1 Traditional talent management practices

2.13.1.1 Traditional recruitment

Although traditional methods to recruit a top-ranking employee may be relied upon to provide a physical employee, they do not necessarily ensure that the employee is top quality. Traditional methods have in fact proven more useful in filling less scarce-skilled roles (Flanagan & Finger, 2013:146; Bassman, 2013). The following are viewed as traditional recruitment strategies, as utilised by most organisations, including the organisation under study:

- Internal recruitment portal

Chan (2015) defines internal recruitment as the practice of selecting from among current employees to fill a position that becomes vacant over time. Organisations default to this method as a cost saving-mechanism, incurring minimal expenditure on advertisements, training and onboarding. Bassman (2013) adds that this is one of the safest methods of recruitment since the organisation is familiar with the level of work produced by the employee.

- Local newspaper advertisement

The above refers to the placement of newspaper advertisements. According to Blake (2016), organisations have relied on this method as it allows for the organisation to reach out to audiences targeted by geographic location. It also reaches out to proactive audiences, actively seeking job opportunities.

- Local Employment Office postings

By all accounts, it has proven easier for organisations to post advertisements in local employment offices as these attract a variety of active job seekers. Bassman (2013) advises that this has become especially popular when an employer is bulk recruiting semi-skilled employees.

Presently at the organisation under study, there are a few fully functional contact centres. In order to function optimally, they require numbers of semi-skilled employees to fulfil the roles of

contact centre agents or administrators. For these roles, the organisation utilises local job postings on its internal and external career sites to attract individuals who are actively seeking employment and who have experience in a contact centre environment.

2.13.1.2 Traditional development initiatives

South Africa has declared a national commitment to the development and enrichment of scarce skills. The South African National Research Foundation (2011), a subsidiary operating under the Department of Higher Education and Training, is committed to allocating a large percentage of its budget to the development of scarce skills. The Foundation's objectives are exceedingly transparent: to increase the number and quality of individuals who possess scarce skills and, importantly, increase EE race and gender representation within the pool. As a result of this, financial institutions such as the insurance company under study have made a considerable investment in developing and transferring skills for familiar scarce-skilled talent such as actuaries, financial accountants and asset managers.

As recorded in Old Mutual (2012), the firm has implemented a Graduate Accelerated Programme [GAP] that provides recent graduates with an opportunity to work and study at the organisation. The programme makes provision for them to attend a host of finance-related courses that include an introduction to financial markets, derivatives and financial mathematics. Employees who successfully complete the programme are tracked closely in terms of continuous training and development.

Nazo (2014:5) provides a list of key knowledge management practices that are traditionally used to distribute historically scarce skills across various segments in financial services organisations such as this insurance company. The list is as follows:

- Expert Interviews

These refer to the exchange of information and skills between individuals who are considered experts in their fields and employees who display an interest in the field.

- Internships and Graduate Programmes

These allow for an inexperienced employee to shadow experienced individuals to gain business acumen and practice in the use of skills.

- Job Rotation

This involves an employee moving between business units or segments, enabling them to gain critically required skills in each segment.

- Skills Inventory

This acts as a centralised hub of knowledge and skills. Individuals are required to document their working styles and outputs so that they may be used for future reference.

2.13.1.3 Traditional retention strategies

In an organisation with an employee base as large as this insurance company's, it often occurs that individuals who are highly skilled and trained are headhunted within the industry and sadly decide to leave.

Grobler et al. (2013:154) and the Management Study Guide (2016) therefore recommend that when a talented employee expresses an inclination to leave, the onus is on the organisation and HR to intervene immediately to establish the reasons for this, together with potential retention strategies.

Halvorson (2013) expresses grave concern that many South African businesses have yet to implement a formal retention strategy, with standardised policies and practices. He defines retention as the techniques and strategies employed by an organisation to motivate an employee to remain with the organisation for a longer period. Traditionally, these include the following:

- Lucrative salary

Halvorson (2013) explains that an overwhelming majority of employees remains at an organisation if offered a lucrative increase in salary, while a minority considers the benefit package provided. The researcher therefore recommends the use of salary progression as a retention strategy, often known in organisations as "selling the salary".

On the other hand, Lumen learning (2018) recommends that organisations "sell the package". The package ideally refers to supplementary benefits received from the organisation. These benefits may range from comprehensive life and disability cover to discounted products and services or subsidised tuition for studies.

- Employee recognition and reward

Baskar (2015:1647) claim that employees are likely to remain at an organisation where their efforts and work are being recognised and rewarded. Shields (2010:121) recommends that organisations learn to customise rewards, recognition and incentives to suit the employee's level of contribution. They should serve to assure the employee that the organisation invests in the long-term growth and advancement of careers.

- Positive performance appraisal

Employees are likely to remain in an organisation that implements a fair performance appraisal process. Nel et al. (2008:491) encourage organisations to use performance assessment to identify talent and as a retention tool. Businesses should also ensure that individual goals are

aligned with their strategic objectives, that deliverables are measurable, deviations are reported early, and developmental plans are put into place to assist the employee to reach or exceed the desired performance.

2.13.1.4 Advantages and disadvantages of traditional talent management strategies

Chan (2015) reports that an advantage of traditional recruitment methods is that they allow the organisation to target individuals who are actively seeking employment, career growth or career change. On the other hand, a disadvantage of these methods is their inability to attract senior individuals who possess scarce skills, as these individuals are not actively applying for roles advertised in the media mentioned above (Blake, 2016).

With developmental initiatives, traditional methods allow for the transfer of existing intellectual property or skills but very rarely accommodate the acquisition of a new or rare skill.

Dhar (2008:108) cautions about a drawback associated with a traditional retention strategy such as a lucrative salary. Since the practice needs to be applied fairly, it may result in the retention of non-performing employees. These employees remain part of the organisation for incremental increases but rarely contribute to the team's success or add value.

What follows next is an outline of 'modern' TMS initiatives within leading organisations globally. An organisation such as the insurance company that is the subject of this study could derive a great deal of benefit from implementing some of these modern practices.

2.14 Modern talent management practices

Terry (2017) poses the question: if skills shortages are such a concern, why isn't the concern backed up with more action? The author maintains that it has become imperative for survival proactively to develop more adaptive, digitally savvy talent management strategies.

The organisation under study has made a clear commitment to investing in new capabilities that add maximum value. In order to attract, develop and retain these newly identified scarce skilled resources, the organisation needs to consider a more rigorous approach to TMS.

Many organisations, including this one, have traditionally believed the notion that "passive" candidates are least interested in new opportunities; but Sinclair (2016:2) challenges this notion, suggesting that it represents an antiquated way of thinking, while there are numbers of innovative methods that are underutilised.

The following section reviews modernised talent management strategies that the insurance company could consider. These are contingent on an understanding of the characteristics of the modern candidate.

2.14.1 The modern candidate

Sinclair (2016:3) describes some of the characteristics associated with modern employment candidates:

- The modern candidate actively takes action and seeks an opportunity in line with their career aspirations
- Modern candidates actively make use of networks. These candidates do not shy away from asking for referrals from friends, family members or professional social networks.
- These candidates are generally between the ages of 18 and 45 and have some sort of post-secondary school qualification
- Being aware of new roles in the market is important to these candidates, irrespective of whether they are actively looking for new employment opportunities
- A large percentage of modern candidates own their job search. These candidates are more likely to feel confident about a job fit if they have picked the company and job rather than being contacted by a talent specialist
- While compensation is an important factor for these candidates, so is flexibility, a desirable location and meaningful work.

2.14.2 Modern recruitment

Bassman (2013) urges organisations to adapt to 21st-century modern methods of recruitment, making significant use of technology to attract the best talent. With the use of modern recruitment strategies, organisations considerably increase the number of prospective applicants and ultimately attract a broader skill pool (Chan, 2015).

Two such strategies are the following:

- Digital recruiting

Taylor (2016) explains that the world of recruiting has gone almost 100% digital. Initially, sourcing via online platforms was supplementary to traditional recruiting, but this has changed rapidly. According to Taylor (2016) and Bassman (2013), the benefits of utilising social media platforms such LinkedIn, Facebook and Twitter as recruitment hubs include the following:

- It is inexpensive and takes minimal time to create an active account

- It allows access to a vast pool of potential candidates within a short period

- ✓ There is built-in infrastructure that supports potential employees attaching relevant documentation for review

- ✓ Online profiles allow the recruiter (TAS) to view a collection of information about a prospective candidate, such as personality fit, participation in online communities, skills set

- Sophisticated data analytic tools

Taylor (2016) introduces the use of data analytical tools as an innovative recruitment strategy. Although data analytics and recruitment are terms not often associated with each other, Taylor argues its importance in the modernisation of recruitment. He proposes that recruiters move away from manually sorting through profiles and move towards using Artificial Intelligence (AI) systems.

AI systems can summarise key information and find, evaluate and organise prime candidates. These systems are also able to implement innovative and filtering assessment techniques that provide recruiters with a holistic view of the top candidates.

Another key feature of the data analysis system is that it helps the recruiter identify which passive candidates to approach. Analysis of the candidate's online public footprint may provide insight into their willingness to consider external opportunities – e.g., their having an interest in a particular role, or following specific organisations.

The Figure below depicts an example of an innovative Artificial Intelligent Applicant Tracking System, *HR Genie.* This is an AI system with comprehensive recruitment and integration software. The system can automatically shortlist candidates that meet minimum requirements via a role description. The system analyses the job description and automatically matches the candidates' CVs.

Figure 2.14.2:1 Genie recruitment system

Both Taylor (2016) and Mackay and Livsey (2006:153) caution that the use of digital tools should not replace personal interaction with prospective candidates but should serve to accelerate and enhance the recruitment process. The authors advise recruiters to take advantage of modern tools and resources to provide a holistic experience for candidates.

2.14.3 Modern development initiatives

As the insurance company continues to deliver against its commitment to creating a digitally transformed organisation, it must embrace and relish change. This includes exploring modern developmental initiatives that re-engineer the way IT and digital-related skills sets are transferred or advanced.

After an employee is recruited and onboarded, it is essential to harness and improve the employee's skills. Many organisations invest in an in-house learning and development department, placing the sole responsibility on the department to harness, improve and transfer skills. Nazo (2014:58) recommends the use of external vendors in addition to internal training initiatives but insists that a portion of the annual budget be allocated to training initiatives, regardless of the method used. These might include web-based learning, classroom/ instructional learning and short courses

In Cape Town, sought-after skills are typically acquired at institutions like Red and Yellow, Inscape Design Collage and AAA School of Advertising. The organisation may opt to send new

joiners or experienced digital experts to obtain or enhance a skill set. This ensures that scarce skills are acquired, enhanced and transferred. The prestigious digital institution, Red and Yellow (2016), suggests the following as potential courses to impart or enhance desirable skill sets:

- Strategic digital marketing
- Online advertising and optimisation of digital campaigns
- Use of direct digital channels
  Managing customer relationships through social media.

After attracting, recruiting and developing a scarce skilled employee, organisations should make sure they retain the talent and yield a return on investment.

- Diversity leadership programmes

Introducing a fairly new concept of skill transfer, Chronus (2018) refers to diversity leadership programmes. This kind of programme acts as a mechanism for leaders to transfer leadership skills to employees who operate in a male/ female-dominated area of work. It involves employees being paired with a same-sex executive who can transfer skills and coping mechanisms to operate within the industry.

- Professional network links

In order to develop new scarce skills, Olenski (2015) advises organisations to invest in creating professional network links for talented employees. They should carry the cost of professional industry association fees and encourage employees to attend networking events to gather additional support, advice and information on how to grow professionally.

- Action learning

Action learning, as described by Stewart and Rigg (2011:192), typically involves a small group of peers who experience somewhat similar issues within an organisation. This group's core focus is solving work problems whilst undergoing profound personal development in the process. The group meets at regular intervals and explores potential solutions to problems by questioning each other, collaborating and leveraging off different experiences and skill sets. The individuals involved learn from taking action and reflecting on real-time workplace issues that have a direct impact on them.

This modern approach still requires sponsorships and investment from senior management to enable junior staff to take action and achieve change. Yet the method is transformational in that it centres on empowering staff to find their own solutions to problems as opposed to bringing in external experts to solve their problems for them.

- Competency and capability building

Ulrich et al. (2012:110) introduce the topic of competency model building. Competencies are defined as the behaviours, skills, values and attributes required by employees to succeed in a specific role. The competency model is essentially a combination of competencies specific to a role in an organisation. These competency models serve as the foundation for performance requirements, business strategy and delivery standards. Organisations should leverage off them as a developmental initiative. Ideally, a task force is identified that comprises organisational and subject matter experts. These people lead initiatives to up-skill and transfer skills within the competency build. The organisation can utilise peak performers and enable them to showcase their talent, using their work as a benchmark for the performance required in a role.

McKay (2019) argues that the digital revolution will not terminate the need for human interaction and service. While machine learning, robotics and artificial intelligence are increasingly utilised in new-age organisations, the need for new-skilled employees is far more essential (McKay, 2019). Technology and digital offerings cannot replace the skills required to succeed in the new world of work. Rather, they act as supporters and integrators.

McKay (2019) confirms that the current workforce will be disrupted by the new industrial revolution. Organisations should prepare the current workforce for the jobs of the future via training or up-skilling. New-age organisations must plan for the reality of operating in a bi-model fashion, one in which the human employees can acquire and develop skills such as critical thinking and complex problem-solving skills. The author challenges organisations to use technological disruption as a platform to introduce individuals to jobs where a whole new skill set is required.

2.14.4 Modern retention practices

Since organisations such as the insurance company operate in a world where processes and products are quickly adopted by competitors, Dhar (2008:104) reiterates the importance of their using their people as a reliable source of competitive advantage. The workforce has changed: younger skilled employees are entering the workplace with new values and expectations, complicating traditional retention efforts. Dhar recommends that organisations constantly adapt retention practices to suit the current workforce.
Some modern retention strategies are explored below.

- Management Monitoring

Halvorson (2013) quotes the adage "Employees don't quit jobs, they quit managers". Organisations seldom view management styles as a retention strategy, yet there is a direct

correlation between a manager's management style and employee satisfaction. A large majority of employee turnover results from an uncomfortable employee-manager relationship.

Organisations that aim to establish and maintain competitive advantage and retain talent need to rid the organisation of old-fashioned notions of leadership and management (McCrimmon, 2010). Instead, to retain employees, a balance of power needs to be established and maintained. Employees are more likely to be fully engaged when they have been involved in the strategic planning and organisation of their work. The employee thereby earns a degree of autonomy, resulting in a deeper engagement with their work and the organisation at large.

Of like mind, McKay (2019) echoes that regular discussions and full integration drive employee engagement. He argues that management and HR are responsible for being aware of facts that may hinder or negatively impact engagement and productivity. Should it arise that management style is a hindering factor, HR owns the responsibility to intervene and find solutions to improve or alter the employee and line manager relationship. The result should secure engagement from the employee and drive and inspire additional discretionary effort.

- HR Metrics

HR Metrics are indicators that enable HR to track and measure various aspects of conduct and achievement. The use of HR metrics is also an innovative way of helping to retain employees by identifying their potential growth. Employees can track themselves against set milestones and monitor adherence to the desired lateral or horizontal growth within the organisation.

- Transparent communication

Dhar (2008:109) recommends using transparent communication as a key retention practice, more specifically for senior skilled employees. Employees are more loyal to an organisation when they believe they are kept informed of key issues within the organisation. If the organisation is experiencing financial difficulty, executive management is leaving or restructuring is a potential possibility, this must be communicated to employees as timeously as possible.

- Psychological contract monitoring

A psychological contract is the unwritten expectation of an employee when entering into employment with an organisation. Although psychological contracts are only virtual and subjective, they are important to employees (Naidoo et al., 2019). The psychological contract usually begins before the individual even starts work, and throughout the employment life cycle employees experience either fulfilment or violation of promised obligations.

When the employee perceives that there has been a breach in this contract, often trust is lost, followed by a lack of engagement and thoughts of exiting the organisation. It is therefore vital for new-age organisations to invest in understanding the impact of the psychological contract on employee retention to prevent the loss of critical employees.

Naidoo et al. (2019) recommend that organisations achieve this through meaningful engagement with employees. Organisations that aim to retain scarce and critical skilled employees are urged to use mechanisms to meet and fulfil obligations, not only in the standard employment contract but also in the psychological contract.

The authors recommend that organisation should performing monthly and quarterly check-ins with employees to discuss aspects such as

- Organisational value alignment
- Trust within the organisation and team
- Perceived organisational support
- Management and supervisory interactions.

These regular evaluations allow the organisation to assess changes in employees' expectations and allow the organisation to identify what they can contribute to fulfilling these expectations.

- Inclusive retention

A contrasting view is that of Sackett (2017). The author agrees that retention will always be a key focus in large organisations, but argues that the organisations need to shift the retention investment. The author proposes that the retention strategy be focused on only top-performing employees and those that have scarce and critical skills.

Sackett (2017) notes that even though every employee is able to leave the organisation, the majority will not. Many organisations survey all employees to discover what works well as a retention strategy, yet most employees typically have few wants or expectations that are not being met. There is a significant difference between what the general workforce wants as a retention mechanism versus what scarce and critical employees require to stay engaged and motivated. What the latter want is a clear career path, performance-based compensation and a great leader.

Sackett (2017) recommends that organisations survey an elite portion of the workforce. This elite comprises key individuals whom the organisation has to retain to remain a leader in the industry. This enables the organisation to tailor its retention packages or strategies for

identified individuals, investing money and time in offering exactly what the scarce and critically-skilled employees require to remain with the organisation.

Sackett (2017) challenges new-age organisations to acknowledge that not all employees are worth retaining. If an individual has not added value to the organisation, the organisation should not be investing resources in retaining him or her. It is simply a fact that not all employees are 'top talent' who hold scarce, and critical skills required to revolutionise the organisation, so not all employees should be eligible to receive the same investment in retaining them.

As a final point, Sackett (2017) suggests that HR needs to shift its focus from ensuring everyone is equal to ensuring that the organisation is ahead of its competitors by retaining noticeably better talent. HR needs to use talented employees to create a high-performing organisation, one that automatically attracts and retains high-performing individuals.

2.15 Advantages and disadvantages of modern TMS

The following advantages attend the use of more modern TMS processes (Bassman, 2013; Chan, 2015):

- They maximise the prospective candidate's recruitment experience

- Webcam interviews streamline the process, especially when the potential candidates and employer are in different locations.

- Expedites the recruitment process (e.g., through online onboarding documentation)

- Permits access to passive candidates – candidates who are not actively seeking a job but are open to exploring appealing opportunities presented to them.

Then, modern developmental methods promote an ongoing supply of information, skills and resources that talented employees can use to solve business problems. Since the skill gap continues to widen between what business needs and what the education systems provide, modern TMS enables an organisation to tailor its developmental programmes or invest externally to acquire and nurture newly-identified scarce skills.

According to Van Eeden (2012:65), modern developmental initiatives involve not only building skills but seek to make a holistic employee investment. They tend to focus on four aspects:

- Knowledge – The conceptual framework required to complete the required task
- Experience – Understanding how theory is applied practically to solve problems

- Skill – The ability to demonstrate actions that complete the task
- Behaviours – Including the conscious attempt to develop insight in the area of expertise and add value to the business with the application thereof.

An advantage of using holistic modern retention strategies is that they prevent talent from being conveyed to direct competitors within the industry (Management Study Guide, 2016). By retaining employees, the organisation safeguards strategies, policies and innovative projects. Dhar (2008:110) adds that retaining key resources with modern retention strategies enables the organisation to utilise the availability of trained and matured manpower to bring about long-lasting competitive advantage for the organisation.

On the other hand, a drawback with implementing modern TMS is the huge financial investment required. In the initial phase of implementing modern TMS, the organisation is required to invest significantly to establish new methods, procedures, software, hardware and/or equipment. Researchers are nevertheless in agreement that the pros outweigh the cons associated with the implementation of modern TMS.

2.16 The case for implementing modern TMS

In an organisation such as this insurance company where constant change is inevitable, modern TMS provides a platform for the organisation to invest in and build talent whilst simultaneously assessing the market for external talent. Modern TMS will enable the company to build a strong talent pool with high-performing employees who are ready for succession. It will nevertheless retain a necessary presence in the external market to be able to attract talented, scarce-skilled individuals. This adds up to a position of power by virtue of the capacity it confers on the company to recruit the best person for the job required.

With reference to developing scarce-skilled employees, modern TMS has the following benefits:
- It allows for employees to use the latest technology to its full potential
- It involves utilising advanced technology to remain competitive in product offerings
- Training forms part of long-term development, incentivising employees to learn and put new skills or knowledge into practice
- It proactively ensures that employees are up-skilled to capitalise on gaps within the market
- It automatically builds a developmental or succession pipeline.

As far as retention is concerned, modern retention strategies make a strong case for not only retaining talented individuals but also for removing poor performers who hinder progress or team innovation. These individuals are released because they no longer add value. Modern

retention strategies seek to understand employees' motivational make-up so that the organisation and its leaders can play an active role in keeping the employee engaged in adding value and feeling valued.

Finally, it is evident that organisations that implement modern TMS ensure that their talented employees can provide business concepts and products that inevitably gain them competitive advantage in the industry (Grobler et al., 2013:155; Van Eeden, 2012:51). Campbell and Hirish (2013:29) go so far as to say that should an organisation fail to implement modern talent management practices, it will be unable to execute critical business tasks. In sum, an investment in modern TMS will yield improved economic outputs, contributing directly to the organisation's bottom line.

2.17 Summary

One clear lesson emerges from the literature review, and this is that organisations and the HR community need to brace for inevitable change. With organisations adopting an agile methodology, HR must do so too, while it is impossible to predict the future and what skills will be required years from now, organisations and HR need to be ready to adapt to each of the worlds of work that emerge.

Attracting and retaining pivotal employees with scarce and critical skills will become the ultimate competitive advantage for organisations. In innovating their talent management practices, organisational leadership and HR need to ensure that they understand why critical skilled employees wanted to work for the organisation in the first place and capitalise on just that.

CHAPTER 3:
RESEARCH METHODOLOGY

3.1 Introduction

It is only through scientific investigation that is it possible to obtain valid and trustworthy knowledge. This requires a systematic approach and a rigorous process of gathering information (Brynard & Hanekom, 2006:1). Research methodology is the "how" of collecting and processing data in the framework of the research process (Brynard & Hanekom, 2006:25).

This chapter provides a detailed explanation of how the research was executed to meet the research objectives. At the outset, the research approach, philosophy and paradigm are explained. Then the research methodology is described in detail, including the selected research design and data collection instrument. The validity and reliability of the instrument are explored. The target population and sample selection are then described, before an account of the fieldwork and data interpretation and analysis is given. The chapter closes with some consideration of the ethical factors impinging on the study.

3.2 Research approach

Walliman (2018:2) describes research as the process of acquiring knowledge and developing an understanding by collecting evidence and interpreting it in order to understand the world around us. When embarking on a research study, the researcher must select an appropriate research approach, that is, the way in which he or she intends to carry out the research (Walliman, 2018:3). The approach includes aspects such as the research philosophy, research design, research methodology and data collection techniques.

To reiterate, the study was guided by the overall aim of identifying the gaps in the current talent management process at the selected organisation, with specific reference to their impact on recruiting, developing and retaining newly-identified, scarce-skilled employees. The study is therefore underpinned by a Naturalist philosophy that assumes that reality constantly changes but can be accessed through the interpretations of human subjects. The research was consequently situated with the Interpretivist paradigm, which centres on understanding the viewpoint of the participant being observed or researched. This meant that the study was qualitative, the primary objective being to generate rich primary data from participants regarding an organisational problem. This was achieved by conducting semi-structured interviews with the participants.

3.3 Research philosophy

Zukauskas et al. (2017) explain that before carrying out empirical research and analysis, it is necessary to identify the underlying research philosophy. The research philosophy is characterised as the set of assumptions on which a research study is based. These include assumptions about human knowledge (epistemological assumption), the reality of encounters during the research (ontological assumption) and the extent to which the researcher's own values will influence the research process (axiological assumption). Made explicit these assumptions then serve to guide the researcher in understanding and developing the research question (Saunders et al., 2009:124).

The research philosophy acts as the foundation of the research. It influences the choice of research strategy, formulation of the problem statement, choice of the research methodology, data collection tool(s) and the process of analysis. A carefully considered choice of research philosophy can help the researcher justify his or her choice of methodology and defend the outcomes of the research.

3.3.1   Naturalistic philosophy

The research philosophy chosen for this study is Naturalistic. Rubin and Rubin (2012:15) explain that the researcher who adopts this philosophy assumes that reality constantly changes but can be known through the explanations of participants in that reality. That is, reality cannot be measured directly, but is rather perceived through people's experience, expectations and knowledge. The information gathered will be subjective, based on the perspective from which the participant views the reality.

The naturalist researcher will seek to explain what they have observed and how this is relevant to the current study. The researcher focuses on understanding what has happened in a specific environment and time frame, instead of trying to predict what will occur next. The naturalist researcher favours qualitative data collection methods, as these allow for the collection of multiple experiences and perspectives that can be analysed. The researcher will encourage participants to actively participate in the research by sharing their knowledge, experiences and opinions about the research question.

Frey et al. (2000) list the following characteristics of naturalist philosophy, which are all aspects of the research conducted for this study:
- It centres on the belief that the research problem must be studied in context
- The researcher focuses on genuine life experiences
- The philosophy lends itself to extended field research that produces descriptive data

- The researcher acts as the primary instrument to collect data
- The use of qualitative data collection methods is highly favoured
- The use of non-random, purposive sampling is highly favoured.

3.3.2 Application to the study

The naturalist research philosophy proved to be the most appropriate for the study for the following reasons (Rubin & Rubin, 2012:23).

1. Nature of reality

The naturalist understands reality as inevitably filtered through the consciousness of human subjects. In this research study, the researcher was aware that participants' perspectives would differ according to how they had experienced the application of the talent management process within the organisation.

2. Type of knowledge sought

Regarding the type of knowledge sought, the naturalist aims to describe processes or events from the perspective of the participants. The intended aim was to highlight the discrepancies experienced in the recruitment, training, development and retention of scarce-skilled employees across the various segments.

3. Role of the researcher

As a naturalist, the researcher is an active listener to or observer of participants' views and experiences. The semi-structured interview enabled the researcher to listen to the views of the participants.

4. Impact of findings

The analysis of the findings may be used to influence a process or practice, or even act as the basis for proposed action. The intention of this study is to share its findings and recommendations with the talent management practice leads across the segments of the company studied, with the purpose of bringing about positive change in the implementation of the talent management process.

3.4 Research paradigm

Kivunjai and Kunyini (2017:1) describe a research paradigm as a set of shared beliefs, perspectives or ways of thinking that informs the interpretation of research data. Vosloo (2014:300) prefers to describe it as a whole system of thinking or worldview. A paradigm

embraces accepted theories, research approaches, preferred methodologies and models, and acts as a composite lens through which the researcher examines the methodological aspects of the research assignment to determine (a) which research methods are deployed and (b) how the research will be analysed. Saunders et al. (2009:129) observe that considering the epistemology of a paradigm ensures that the researcher understands what is considered acceptable knowledge and constitutes high-quality data. Considering the ontological assumptions of a paradigm ensures that the researcher understands and accepts what constitutes reality in the research environment. Awareness of the axiological dimension ensures that the researcher understands and accepts the ethical requirements of a proposed research study. In order to adopt a suitable paradigm for research purposes, the researcher must confront and understand his or her own thinking, actions, beliefs and assumptions (Saunders et al., 2009:125).

3.4.1 Interpretivist paradigm

The study was conducted within the interpretivist paradigm (also known as the participative or constructivist paradigm). This paradigm centres on understanding how humans perceive and interpret their environment (Saunders et al., 2009:134). Vosloo (2014:307) notes that research within the interpretivist paradigm involves exploring social phenomena, with the primary objective of gaining understanding. Humans are constantly trying to understand the world in which they operate. In doing so, they interpret, create, give meaning to and rationalise their daily actions within the environment. The primary purpose of research conducted within an interpretivist paradigm is to understand the experiences of research participants. The researcher accepts that views and perceptions are necessarily subjective because shaped by the experience and individuality of the participants (and, to a limited extent, by the aims of the researcher).

3.4.2 Rationale for the chosen paradigm

The interpretivist paradigm was appropriate for this study for the following categories of rationale:

1. Epistemology: Meaningful primary data was acquired from recorded interviews
2. Ontology: The reality that the researcher wished to explore was vested in the experience of participants, and was therefore accessible by engaging with them
3. Methodology: A qualitative data collection tool was used, with the primary purpose of offering recommendations to improve the conditions of the participants
4. Axiology: Strict ethical considerations were followed during the study. (Adopted from Kivunjai & Kunyini, 2017:9.)

Vosloo (2014:308) offers a slightly different set of reasons that justify the use of the interpretivist paradigm. Here they are followed by the researcher's annotations:

- The social environment is given meaning by the participants who exist within the environment. (The research largely focused on how participants viewed and experienced the talent management process within their business units.)
- The researcher is a part of what is being observed. (The researcher's role is that of human capital consultant, having evolved from talent acquisition specialist. A core focus of the role is the implementation of the talent management process. The researcher also conducted all the interviews.)
- Research is driven by interest. (This is appropriate since the topic of talent management is of interest to the researcher and applicable to the role of the human capital consultant.)

As far as research methodology is concerned, Vosloo (2014:308) observes that the interpretive paradigm typically involves the use of an interactive, field-based methodology, and it is to this that we turn next.

3.5 Research methodology

Igwenagu (2016:5) defines research methodology as a set of systematic techniques used in research. This study employed a qualitative research methodology.

3.5.1   Qualitative research method

A non-experimental research design was followed. The study did not aim to control the independent variable, but rather to observe the interrelation among variables, with the object of producing descriptive data about the problem identified. The keynote of qualitative research is its phenomenological approach, where the empirical point of departure is the participant's perspective (Brynard & Hanekom, 2006:37). The qualitative research method is characterised by open-ended data collection, interpretive analysis and the desire to contribute to a body of knowledge (Flick, 2015:12). Kumar (2019:18) explains that a study is categorised as qualitative if its primary purpose is to describe a situation, problem or event. The research provides an account of feelings, experiences, opinions and perceptions around the situation, problem or event, without quantifying these.

3.5.2   Rationale for the research methodology

The qualitative approach proved to be appropriate for this study as it focused on the real-life experiences of participants. It enabled the gathering of meaningful information and perspectives from the research participants by allowing them to explain their personal views and opinions.

This study aimed to ascertain whether there are any gaps in the current talent management process at the insurer in Cape Town. Participants were asked to share their personal experiences of the implementation and application of the talent management process. Myers (2020:5) maintains that a benefit of the qualitative approach is that it helps the researcher to understand the decisions, actions and experiences of participants by talking to and engaging with them.

Myers (2020:9) also notes that the most common technique for collecting qualitative data is the interview. The interview allows the researcher to record what participants say and what the researcher thought or experienced during the interview. The majority of the interviews in this study were conducted in person with the participants. This enabled the researcher to engage directly with the participants and observe body language, facial expressions and other nonverbal communication signs. The latter helped, for instance, the researcher the frustrations experienced by the participants when they were discussing the discrepancies that existed in the current talent management process. The researcher collected, analysed and interpreted data in the form of what participants said in the interviews.

A qualitative approach was therefore most appropriate for this research study as the researcher aimed to find practical solutions and recommendations to bridge the gap between current and required innovative talent management strategies at the insurer in Cape Town.

3.6 Research design

According to Flick (2009:36), a research design is a plan for collecting and analysing the data that will make it possible for the researcher to answer the research question. Van Wyk (2012:5) and Myers (2020:21) explain that the research design involves deciding on factors such as (a) the data collection technique/method and (b) the approach to data analysis – in other words, how the research question is going to be answered.

Van Wyk (2012:13) adds that the point of departure in choosing a research design is understanding the research problem and question. The researcher then needs to identify what evidence is required to address the research question appropriately. The next decision is how the required data is to be gathered.

Jackson (2017) argues that choosing the correct research design is of the utmost importance as it ensures that the evidence is collected in a manner that can answer the research question without any or with minimal ambiguity. The research design should ensure that the answer to the research question can be defended by data and evidence.

3.6.1 Exploratory design

In this study, primary data was used to answer the research questions. Hair et al. (2011:140) describe primary data as data gathered specifically for the research study being undertaken. For such a study, the exploratory design is best in that the research seeks to discover relationships, patterns and themes that relate to the research problem (Hair et al., 2011:148). There is no research hypotheses, but rather open-ended enquiry aimed at amassing evidence to answer the relevant research question.

According to Hair et al. (2011:148), in exploratory research, the researcher first reviews existing literature to gain a comprehensive understanding of the topic at hand. He or she then uses a qualitative data technique to gather data that can serve to answer the research question.

3.6.2 Application to the study

For this study, an exploratory design is most appropriate. Prior to embarking on data collection, the researcher completed a comprehensive literature review, which consisted of accumulating and consulting academic sources relevant to the topic of talent management. This ensured that the researcher had a thorough understanding of the topic.

The research question read as follows: "How are the current talent management practices lacking in terms of recruiting, developing and retaining newly-identified, scarce-skilled employees?" Since the context of the research was a business environment, the researcher sought to establish who was best able to answer the research question within that environment. After careful consideration and engagement at talent management forums and meetings, the researcher purposively selected the human capital teams across several segments to answer the research question.

The exploratory design allowed the researcher to engage with participants via a semi-structured interview process and thus acquire new data. An interview guide helped to elicit data regarding how the HR community has experienced the talent management process within their relevant segments, with specific reference to those employees who are considered top talent or who own scarce and critical skills. This data was used to identify emerging themes around discrepancies within the current talent management process, which were used in turn to address the research question.

3.7 Data collection instrument

Since the study is non-experimental by design, the primary data collection mechanism was a semi-structured interview.

3.7.1 Semi-structured interview

Kvale (2009:7) defines an interview as a conversation that has structure and purpose (as determined by the interviewer), a conversation in which the researcher is required to use careful questioning and listening techniques to elicit specific information. Interviews enable the researcher to gain insight into the experiences and opinions of participants (Gray, 2020: 405). Gathering the multiple views, opinions and experiences of participants, the researcher aims to interpret them to arrive at an understanding. This understanding is then used to answer the research question.

According to Adams (2015:492), the semi-structured interview is simple and descriptive. It permits a blend of closed and open-ended questions. The semi-structured interview is recommended for use in research studies where the researcher aims to understand the independent thoughts and opinions of each individual participant. Flick (2018:472) confirms that the semi-structured interview works well when the researcher's objective is to learn about people's beliefs, perspectives and experiences.

In choosing a data collection method, the researcher is required to review its advantages and disadvantages to decide on its suitability for the research study. Hox (2005: 593) points out that an obvious advantage of gathering primary data via the semi-structured interview is that it enables the researcher to collect information for the specific purpose of addressing the identified problem and answering the relevant research question. Barcaly (2018:45) adds that the semi-structured interview technique allows for flexibility. It affords the researcher the opportunity to prompt the respondent for more information, which is useful if there are several sub-topics to address.

On the other hand, Gray (2020:409) cautions that a challenge with this technique may be the level of interaction required of the interviewer. During an interview, the interviewer is required to pose questions to the interviewee, actively listen to the responses of the interviewee, capture data via audio and shorthand notes, probe for additional information and observe nonverbal communication such as tone of voice and body language. Adams (2015:493) adds that the semi-structured interview is also time-consuming and labour intensive. The process of participant selection, interview set up, conducting interviews and analysing the interview data takes a substantial amount of time and effort.

Although these authors highlight the challenges associated with this technique, they maintain that if the interview is well planned and the researcher is thoroughly prepared, the semi-structured interview is a powerful technique to elicit rich data that relates to the opinions, experience, beliefs and views of individuals.

3.7.2 Application to the study

Regarding the design of the semi-structured interview, Adams (2015:498) recommends that researchers create an "interview guide" as opposed to an interview questionnaire. This facilitates a more interactive approach to the interview conversation. The interview guide provides an outline of planned topics that the researcher would like to gather information about.

In this study, the semi-structured interviews consisted of five sections, as described below. The middle sections comprised questions about the participant's experience of and opinion on what was lacking within each phase of the talent management process.

Section A: Section A sought generic biographical information about the participants: language, gender, years of service and employment category. The next three sections were purposefully designed to elicit answers about three fundamental aspects of talent management practice. The last section focused on understanding the impact that the talent management process had on the business.

Section B: Questions in this section were explicitly aimed at understanding the participants' opinions, views and experiences of aspects relating to the people, process and systems used to facilitate the attraction, recruitment and onboarding of the organisation's resources.

Section C: Section C focused on soliciting feedback around the use and implementation of learning, training and development within the organisation.

Section D: This section collected information about the retention mechanisms used in the organisation and the efficacy thereof.

Section E: The final section included questions to ascertain the impact of the talent management process on the business.

Within this general framework, the researcher probed participants on their areas of expertise. This flexibility allowed for the researcher to gain useful insights into subsections of the talent management process.

This methodology was aligned to the main objective of understanding the feedback the HR community was receiving from their client areas regarding the current talent management process. The semi-structured interview format enabled the researcher to home in on what was perceived to be lacking in terms of attracting, developing and retaining scarce-skilled and top talent individuals. HR practitioners were encouraged to share experiences, relay examples and articulate their perspectives on what was lacking within the current process. The relaxed atmosphere created by the face-to-face engagement helped the respondents to open up (Brynard & Hanekom, 2006:40), and the flexibility of the semi-structured interview render it more user-friendly than the structured interview (Saks & Allsop, 2013).

Most of the interviews in the study were conducted face to face. The interviewer made sure the interviewees were comfortable and relaxed before beginning the interview. They were invited to ask any clarifying questions about the study and its objectives. When appropriate, the researcher tailored or paraphrased questions to suit the interviewee.

3.8 Validity

A study is regarded as valid if it can measure what it intends to measure. Thus Leung (2015:324) observes that the validity of the research refers to the level of appropriateness of the tools and processes used to conduct the research study. The researcher needs to ascertain whether the choice of methodology is appropriate for answering the research question. In addition, the researcher needs to ensure that the sampling selection and data analysis and interpretation are appropriate. The study utilised the following validity criteria (Brynard & Hanekom, 2006:48):

- Content validity

Content validity tests the suitability of the questions included in the data collection schedule. The author recommends that the researcher test the (a) correctness, (b) relevance and (c) logic of the questions included. The researcher conducted a preliminary or pilot investigation to test the correctness and appropriateness of the questions. The feedback received from the participants allowed the researcher to modify the interview guide to improve the logical flow of the questions asked.

- Construct validity

Construct validity refers to the degree to which the data collection technique can discover the information it aims to discover. Before conducting the interviews, the researcher confirmed that the questions in the guide would obtain the desired information. The guide was developed with reference to the research question, and structured in the way described above, with sub-sections devoted to (a) attraction and recruitment, (b) training, learning and development, (c) retention and (d) business impact.

- Criterion-related validity

Criterion-related validity is grounded in whether the data collection technique can measure what it is expected to measure and whether or not it can be compared to another comparable valid instrument. In testing for criterion-related validity, the researcher reviewed other theses at tertiary institutions with similar topics, which also employed interviews as the data collection technique. The work of Musakuro (2018) and Lesogo Peejay (2011) are seemingly successful studies that included the interview as a data collection technique.

- Face validity

Face validity is concerned with how the data collection technique appears to the participants. It is recommended that the researcher consult the subjective judgment of the participants to ensure that the data collection instrument is engaging to them. The questions posed were easy to understand and answer, yet they elicited meaningful contributions from the participants. To help avoid bias, the study sample selected was fair and representative, the interviewer posed specific, detailed questions, and avoided leading questions.

3.9 Reliability

According to Brynard and Hanekom (2006:48), reliability pertains to the accuracy and consistency of measurement. The authors maintain that the same instrument, under similar conditions and at a later stage, should be able to produce the same data. Similarly, Crossman (2019) defines reliability as the degree to which the instrument will yield the same results each time it is used, supposing the underlying conditions do not change. He suggests a variety of methods to test reliability, including the test–retest procedure, the alternate forms procedure, the split halves procedure and the internal consistency procedure.

In this study, the researcher made use of the internal consistency procedure, in that the same interview guide was used throughout and the researcher checked on the similarity and/or consistency of the responses.

Validity and reliability are two significant features of research. Ensuring the reliability and validity of the data collection instrument is crucial to the quality of the research.

3.10 Pilot test: Semi-structured interview guide

Dikko (2016:522) explains pilot testing as the process by which a researcher conducts a preliminary test to determine the content and construct validity of the data collection tool. It enables the researcher to identify potential problems and make any necessary adjustments before embarking on the actual data collection. Among the benefits of conducting a pilot test of a semi-structured interview is that it should reveal whether the questions posed will answer the research question, while highlighting ambiguity and indeterminacy.

3.10.1 Application to the study

Guided by Dikko (2016:524), the study employed a pilot test as follows.
1. In selecting the participants for the pilot study, the researcher utilised the same criteria that would be used for the actual research study. The researcher selected three human capital business partners who were involved in the talent management process across business units in which there were scarce-skilled employees.

2. Next, the researcher focused on selecting the appropriate interview setting. She chose meeting rooms with adequate lighting and seating at the far end of the open-plan office floor. This minimised disruptions and background noise.
3. Before setting up the interview with the participant, the researcher established the context by asking the participants to participate in the pilot study and provide feedback to help improve the interview guide.
4. Thereafter, the interview was conducted, using the interview guide. At the outset, the researcher asked participants to answer the questions as if they were being interviewed for the actual study. She also asked them to note possible improvements in (a) the structure of the interview guide, (b) the logical flow of questions and (c) the ease of understanding the questions.
5. Once the mock interview had been completed, participants were asked to share their feedback. The most significant feedback included:

   - The interview invitation should include more contextual information about the study so that participants could prepare their thoughts prior to arriving at the interview room.
   - In Section A of the interview guide (generic biographical data), the participants indicated that asking them how long they had been in their current role felt limiting.
   - In the other sub-sections, the participants indicated that some of the questions seemed to bear no relation to the ones that followed.
   - The interview guide's ending at retention did not summarise the research question as a whole. It felt like a halt rather than an ending.

Based on the feedback received from the pilot study, the researcher was able to introduce the following adjustments before embarking on the actual research study. The researcher included a note to participants with the request for an interview. The note featured the title and purpose of the study, advice of the permission granted for the study and the ethical considerations that would be observed during the study.

Then, the researcher amended a question in Section A of the interview guide (generic biographical data). The question was changed to enhance inclusivity from number of years in current role to number of years within the organisation. The order of the questions was adjusted to group questions according to whether they pertained to process, system or people. Lastly, the researcher added section E, which aimed to conclude the study by seeking views regarding the impact that the talent management process had on the business. In summary, the pilot study enabled the researcher to adjust and improve the initial interview guide.

3.11 Target population

Alvi (2016:10) describes a target population as comprising all the members who meet the criteria specified for the research investigation. In this study, the researcher selected her target population as employees in four segments across the Old Mutual group, namely Old Mutual Personal Finance, Old Mutual Mass Foundation Cluster, Old Mutual Capability Cluster and Old Mutual Customer Solutions. Each segment is responsible for different functions, such as sales, asset management, product development and business support. In order to provide a rationale for the researcher's choice, it is important to offer an overview of what each segment is responsible for.

- **Customer Solutions**

This segment focuses on designing and developing the products and services that the organisation sells. This includes product and service design, development and performance, and managing customer onboarding and relationships. Human capital practitioners within this area were potentially information-rich participants since they were involved in the application and implementation of the talent management process for roles such as product development specialists, actuaries, doctors, engineers and statisticians. The human capital team that supports this segment is fairly small, so the majority of the team participated in the research study.

- **Old Mutual Personal Finance and Old Mutual Mass Foundation Cluster**

These two segments are commonly known as customer-facing businesses. Both segments are concerned with the sales of products and services. The segment also focuses on offering financial advice and solutions to customers across the country. What distinguishes the two segments from each other is the market for which they cater. The Personal Finance segment focuses on products and services most purchased by middle-income customers., while the Mass Foundation Cluster focuses on products and services most purchased by lower-income customers. Human capital practitioners within this area were information-rich participants since they were involved in the application and implementation of the talent management process for areas such as sales, distribution and financial advice. Key critical roles included the sales force, fit and proper advisors and distribution product advisors.

- **Capability Cluster**

The Capability Cluster segment is largely an enablement business. This segment provides strategic support and enablement to the sales and customer-facing business. It is largely focused on the provision of IT services, contracts and sourcing services, digital and data services and financial and commercial services.

A significant number of participants was sourced from this segment. Since the organisation is on a journey toward digitisation, this segment effectively enables the customer-facing or sales business segment to offer innovative products and services, while ensuring that the organisation acts in a responsible manner, both financially and ethically. Since the study focused on participants who had access to critical and scarce-skilled employees, this segment's human capital team had crucial data to contribute to answering the research question. Human capital practitioners from this segment supported critical and scarce-skills employees such as data scientists, analyst programmers, information security specialists, chief information officers, finance executives, contract and sourcing specialists, etc. These participants were able to share valuable experience, opinions and views on how the talent management was conducted in areas that hold the scarcest talent.

3.11.1 Population description

Across the segments mentioned above, there are 52 HR practitioners involved in the talent management process. These practitioners work across the segments and either manage an end-to-end talent management process for the segments or are involved in one aspect of the talent management process, i.e., attraction and recruitment, training, learning and development, or remuneration and benefits.

The rationale for the selection of segments concerned the type of service provided, which was directly linked to the type of scarce-skilled talent the human capital team and management would need to manage. Moreover, the population included permanent and non-permanent, contract-type employees. Since the organisation makes use of role size as a seniority grading system, the population for the study included all role size employees within the human resources teams.

Regarding age, the population included employees within the range 20 to 61. This was capped at 61, as 61 is the organisation's mandatory retirement age. The tenure of the employees included in the population ranged from < 12 months to > 10 years. Included in the population were employees with a variety of job titles such as Human Resource Business Partner, Human Resource Practitioner, Human Resource Consultant, Learning Consultant, Senior Learning Facilitator, Talent Acquisition Practitioner and Talent Acquisition Specialist. It was important for the researcher to select a sample that is representative of the research population.

3.12 Sample

In a research investigation, it is almost impossible to assess or even access the entire population. To this end, Alvi (2016:10) introduces the notion of sampling, the sample being an

extract from the population, a smaller number than the population. The sample must be representative of the population to ensure the accuracy of the data generated. As a guideline in determining the sample size, the study utilised a table recommended by Brynard and Hanekom (2006:57).

Table 3.12.1: Table to determine sample size

Population	Percentage suggested	Sample [number of respondents]
20	100%	20
30	80%	24
50	64%	32
100	45%	45
200	32%	64
500	20%	100
1000	14%	140
10 000	4,5%	450
100 000	2%	2000
200 000	1%	2000

3.12.1 Purposive sampling

The study made use of purposive, non-probability sampling. Tongco (2007:147) describes purposive sampling as judgment sampling. The researcher decides what needs to be known and selects participants who can and are willing to offer information by virtue of their experience or knowledge. The selection of participants is non-random, as the researcher deliberately chooses participants who possess certain attributes or qualities. This sampling method was chosen in part because of the ease of accessibility and availability of the respondents. It permitted the researcher to use her judgement in choosing the participants according to who most likely to possess the information required to answer the research question.

3.12.2 Sample description

The research population comprises 52 HRP's. According to the table above, this meant a sample of 64%, so the researcher targeted engagement with 34 participants across the various segments to ensure a fair and accurate representation.

The sample selected consisted of a mixture of permanent and non-permanent, contract-type employees. As per the company's seniority grading system, the role sizes included in the sample selection ranged from role size L to role size O. The employees were aged between 20 and 57. All the job titles in the population were represented in the sample selected.

The researcher selected participants and HR practitioners who support areas that are dominated by scarce-skilled employees. These HR practitioners had insight into what talent management strategies have lacked in attracting, developing and retaining scarce-skilled employees within their segments. Since the study employed purposive sampling, the researcher applied her judgement in the choice of participants. In order to select the most representative and information-rich sample of 34, the researcher did the following:

1. She engaged with the Central human capital team's talent management practice owner. The Central human capital team acts as the centre of excellence for all human capital policies and practices. The Central team owners have end-to-end accountability for the deployment of talent management within the various segments listed above.

2. During the engagement with the talent management practice owner, the researcher was provided with a full theoretical overview of talent management practice in the company and how it is deployed within the various segments.

3. The talent management practice owner then introduced the researcher to the talent practice leads within each segment. It was explained that the talent practice lead within the segment was responsible for ensuring that the talent management practice was implemented and tracked appropriately.

4. The researcher then set up individual meetings with each segment practice lead and learned how the practice was implemented within the segment, perhaps more importantly, who the key role players were in the implementation process.

5. The talent practice lead for each segment was able to provide valuable insight into which human resources business partners, learning partners and acquisition specialists had the most relevant experience and knowledge to contribute to answering the research question. Together with the practice lead, the researcher purposively identified who would form part of the selected sample.

6. Factors such as the size of the segment's human resource team, the level of employee scarcity and the number of specialists and generalists in the team, influenced the choice of participants.

7. With reference to the distribution of the 34 participants, three participants formed part of the Customer Solutions segment. This is attributed to the team's being an extremely small HR team, though the scarcity of the skills that the HR team supports is exceptionally high. A total of twelve participants were from the customer-facing business, namely Mass Foundation Cluster and Personal Finance. The HR teams there are fairly large. The selection focused predominantly on the generalists and specialists that offered HR services to the sales and enabling functions parts of the business. The scarcity of the skills housed in the segment is medium to high. Then, a total of nineteen participants were selected from the capability cluster, whose HR team is fairly large.

The majority of the participants were selected from this segment, which is leading the digital and technology enablement of the organisation. The HR practitioners in this segment manage highly sought-after skill sets and therefore provided the most valuable insight into how the organisation is required to shift its traditional talent management practices.

The researcher aimed to select those participants who had been exposed both to the traditional ways in which talent management had been conducted and to the new world of work and new ways of work. This ensured that participants were able to identify what the organisation had done previously and what appeared to be more innovative.

3.13 Structuring and implementation of data collection

Pouspourika (2018) and McNamara (2018) advise that before a study begins there should be a plan for how the data collection will occur. The sequence of events in structuring and implementing the data collection is described below.

- A research proposal was submitted to the university's ethics committee, and approval was granted for the study to be conducted.
- The researcher then requested permission from the organisation concerned to study the problem identified. The researcher had to engage with the HR executives in the relevant segments and seek approval from them individually. The HR executive in the researcher's segment supported the request and strengthened the motivation with supporting emails.
- The request explained why the research would be valuable to the organisation, highlighting its objectives and positive potential impact on future talent management practices.
- Subsequently, the researcher requested information access and permission to engage with the relevant targeted population.
- A pilot test was conducted and used to improve the interview guide to ensure its viability in securing information to answer the research question.
- Once access was granted to the target population, the researcher used a purposive sampling technique to select the most suitable candidates.
- When the participants had been selected, the researcher engaged with them about the purpose of the study and their willingness to participate.
- Thereafter the researcher started the field work. The data gathered was analysed and interpreted.
- Findings were made and the researcher used these to suggest practical solutions and make recommendations.

- The recommendations were shared with the organisation and talent management practice leads in the various segments.

In embarking on the study, fieldwork was conducted. An account of this follows.

3.13.1 Fieldwork

Olivier De Sardan & Tidjani Alou (2015:22) explain that qualitative and quantitative studies follow different paths in the collection of data. The authors maintain that the objective of a qualitative study is to produce data that offers significant points of view, beliefs and everyday experiences. The authors therefore recommend that the researcher immerse him- or herself in fieldwork to gather a multi-dimensional view of the subject under research.

3.13.2 Application to study

As recommended by Mikėnė et al. (2013:59) and Olivier De Sardan & Tidjani Alou (2015:23), the process of performing the fieldwork proceeded as follows: first, the researcher completed some background research. This ensured a thorough understanding of the topic as well as an awareness of questions that might arise in the interviews. Following this, the researcher developed the interview guide which received approval from the Ethics Committee. Then the researcher contacted participants before the interview, discussed their anonymity and rights as participants and outlined the purpose of the research. At this point, the researcher elicited and obtained verbal or written consent from participants to participate in the study.

In order to set up each interview, the researcher provided an electronic meeting request detailing the meeting date, venue and time. Participants were asked to select accept if they were comfortable with proceeding with the interview. The researcher selected a venue with appropriate lighting and air flow, as well as the necessary privacy for conducting the interview. The researcher prepared for sensitive situations and formulated coping mechanisms. The semi-structured interviews were held face to face, encouraging direct interaction and providing scope for addressing any additional issues or topics that might arise. The interviews were recorded and transcribed by the researcher. There were no additional fieldworkers recruited or trained. All interviews were conducted by the researcher.

The researcher next had to analyse and interpret the data gathered.

3.14 Data interpretation and analysis

In the case of qualitative data, Sunday (2017:19) notes that the researcher utilises the data collected to create a form of (a) understanding, (b) explanation or (c) interpretation of the problem being investigated.

Sunday (2017:28) and Percy et al. (2015:80) recommend the use of inductive analysis. This approach does not attempt to fit the data into any pre-existing categories but allows categories to emerge from the data itself. First, the researcher focuses on each participant's answers individually. The researcher intuitively highlights sentences, phrases and paragraphs that appear meaningful. From among these, and referring to the interview guide, the researcher extracts those that could potentially contribute to answering the research question.

Then the information with the potential to answer the research question undergoes a coding process. The code acts as a way of keeping track of individual items within the data. The individual items are clustered according to shared characteristics, which in turn yields emerging patterns and themes. To build these themes, the researcher makes use of direct quotations, examples and verbatim statements to explain to the reader how the research question will be answered with the data. Each theme hosts similar experiences and opinions articulated by the research participants that appear to answer part of the research question. In the final step, the researcher synthesises all the themes and data collected in such a way as to answer the research question.

3.14.1 Application to study

The researcher utilised a recording device and transcript software to assist with recording the 34 interviews verbatim. The raw data was extracted and inserted into a table under the relevant question.

The researcher read through the interview feedback to gain understanding, highlighting key phrases, examples and experiences that appeared meaningful. These highlighted aspects were then grouped so as to address the research question. The groups were based on the interview guide, comprising (a) attraction and recruitment, (b) training, learning and development, (c) retention and (d) business impact. Since the researcher was working with electronic data, allocating a colour to each subcategory proved to be a useful differentiator when coding the data. Still working within the subsections, the researcher grouped data according to whether a potential discrepancy was people-, system- or process-related. Participants' answers were grouped according to their opinions or experiences. The use of direct quotations or examples helped to elucidate the pattern that manifested.

Within each subcategory, the researcher identified emerging patterns of discrepancies. To strengthen her argument, she introduced supportive quotations and examples from the views expressed by the various respondents. At the end of each subsection, the researcher offered a high-level reiteration of the discrepancies identified.

Before concluding, the researcher revisited all the data to confirm that nothing meaningful had been omitted. As a final step, she used the subsections' data to summarise the discrepancies in the current talent management process, indicating how these discrepancies were misaligned with modern offerings within the market.

In support of the inductive and thematic analysis, Vaismoradi et al. (2016:107) laud its strengths, noting that it enables the researcher to consider both the objective and subjective aspects of the participants' feedback. As Vaismoradi et al. (2016:108) maintain, the approach equips the researcher with a deep understanding of the intricacies of human experience within the area of focus. It also allows the researcher easily to access recurrent themes to influence or inform practical changes within the research field.

The feedback from participants will thus be used to inform the organisation under study of discrepancies within the process, with the primary objective of improving, advancing and modernising the talent management offering, with a specific emphasis on scarce-skilled employees and those considered top talent.

3.15 Ethical considerations

Flick (2018:135) defines research ethics as concerned with the effect of the researcher's involvement on the people with or about whom the research is being conducted. As a result, research ethics are grounded in procedures aimed at protecting those who participate in a research study.

The author explains that there are core principles that underpin research ethics. These include the researcher's being able to justify the rationale for their study, being able to explain the methodological procedure to be followed, as well as the likely or intended impact of the research. More importantly, research ethics are concerned with the conditions under which participants participate in the research, and whether their involvement may have positive or negative results. The researcher to required to ascertain if there are any possible violations, dangers or harm that may come to participants should they participate in the study. Research ethics guide the researcher to ensure these factors have been proactively and appropriately managed prior to his or her embarking on the research study.

Flick (2018:146) notes that qualitative studies are often very open and adaptable to what happens in the field during data collection. He cautions that this creates a greater need for the researcher to ensure that there is a comprehensive plan and approach to mitigate any ethical dilemmas. Flick (2018) suggests that the researcher utilise a checklist to ensure that the

qualitative data is collected ethically. Such a checklist would include items such as how data will be gathered, how consent is obtained and how ethics approval is granted to conduct the study.

3.15.1 Application to the study

In this study, the researcher utilised the checklist of Flick (2018: 147) and the recommendations of Lues and Lategaan (2006:22) to ensure that the study was ethically sound. To comply with the relevant ethical standards, the study acceded to the following:

- Ensure the quality and integrity of the research: The study adhered to all ethical rules and governance during the collection of data, as well as in the dissemination of findings.
- Show that the research is independent and impartial: Before beginning the study, participants were provided with an explanation of the intended outcome of the research and assurance that the research would be unbiased.
- Voluntary participation and informed consent: Voluntary informed consent to be interviewed was obtained via email prior to each interview.
- Confidentiality and anonymity: Participants were assured that their identities would remain anonymous and that any information provided would be treated as confidential.
- Avoid harm to participants: The study did not cause physical or emotional harm to any participant.

The research study only commenced after formal approval from the research ethics committee at the higher education institution. The ethics committee approved the research proposal, which included the interview guide.

3.16 Summary

This chapter has provided a detailed description of how the research was executed to meet the research objectives. Approached from a Naturalist perspective, the research consisted of a qualitative study within the interpretivist paradigm. Its core objective was to investigate gaps or discrepancies in the current talent management process as experienced by those who make frequent use of it. Therefore, a non-experimental, exploratory research design was adopted. The primary data collection instrument was a series of semi-structured interviews with a sample of HR practitioners. Each interview consisted of four sections comprising relating to the participant's experience of and opinion on what was lacking within each phase of the talent management cycle.

The researcher purposively selected a sample of 34 information-rich participants who supported areas within the organisation dominated by scare-skilled employees. Whilst

conducting the fieldwork, the researcher used an interview guide to steer the exchanges. The data collected was grouped and analysed thematically.

The chapter concluded by outlining the ethical considerations that guided the research process.

CHAPTER 4:
RESEARCH FINDINGS
4.1 Introduction

The format of this chapter is as follows. The researcher explains Appendix E, a compilation of the raw data gathered from the interviews. This is followed by graphic representations of the findings. Conducting the analysis involved extensive reliance on the researcher's judgment. The researcher was required to critically analyse the findings by identifying and interpreting themes emerging from the data set.

4.2 Research findings: raw data explanation

As was adumbrated in the previous chapter, with inductive analysis the researcher analyses the data with no predetermined framework or outcome. The data itself serves to determine the structure and outcomes of the analysis (Burnard et al., 2008:429). To recapitulate, this data was assembled by the researcher through semi-structured interviews with 34 participants from the HR community at the relevant organisation. They comprised a sample purposively selected according to their knowledge and relevant experience.

The copious raw data from the semi-structured interviews is provided as Appendix E, below.

4.3 Research findings: graphic presentation

To reiterate, the main objective of the research was to determine if a lack of innovative talent management processes has led to a substantial loss of talented critical and scarce skills at the selected insurance company. This question was formulated in the following way: how are the current talent management practices lacking in terms of recruiting, developing and retaining newly-identified, scarce-skilled employees.

The data from the interviews was analysed under the five section headings of the interview guide, viz.:

Section A: Generic biographical data of participants

Section B: Attraction, recruitment and onboarding

Section C: Learning, training and development

Section D: Retention

Section E: Business impact.

Verdinelli and Scagnoli (2013:360) claim that data display is an important step in qualitative analysis and encourage the use of visual representations in this process. The graphic format enables the researcher to display the data in a concise and efficient manner that is easy for

the reader to understand. It also allows the researcher to show connections among the data. The use of figures and diagrams serves several purposes in qualitative analysis, including (a) representing exploratory or initial data collection, (b) representing answers or explanations, and (c) developing theory or themes.

Since this is a qualitative study, it will reference not specific numbers but general categories. The following scale will be utilised.

Small majority	50%-55%
Significant majority	55%-65%
Large majority	65%-75%
Overwhelming majority	75%+

4.3.1 Section A: Generic biographical data

This section provides an analysis of the biographical data of the participants in the study.

- **Gender**
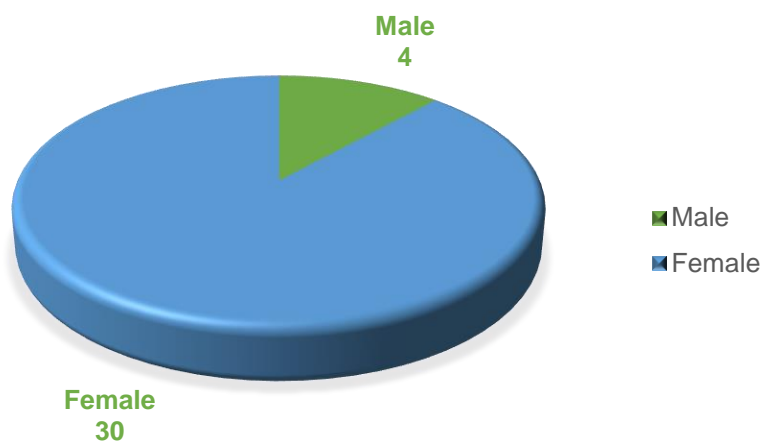
Figure 4.3.1.1: Gender of participants

There was a total of 34 participants that were chosen for the study, of whom 30 were female and 4 were male. While this gender imbalance is noteworthy, gender was not a factor in the choice of respondents. The purposive sampling concentrated on the specific experience and knowledge of the respondents.

- **First language**
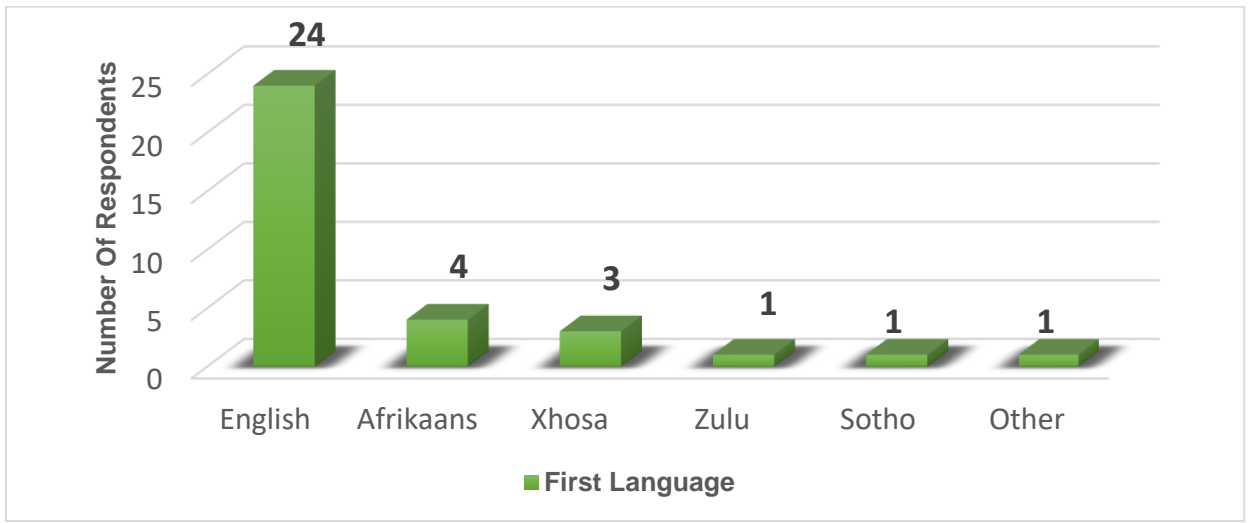
Figure 4.3.1.2: First language of participants

From the 34 respondents interviewed, 24 indicated that their first language was English. A further 4 indicated that their first language was Afrikaans, 3 were Xhosa-speaking, one Zulu, one Sotho, and one who indicated their first language as 'other'. Despite the differences in first language, the universal business language within the organisation is English and therefore all the interviews were conducted in English. With respondents for whom English was a second language, the researcher took extra care to ask the questions slowly and provide further explanation as required.

- **Employment category**
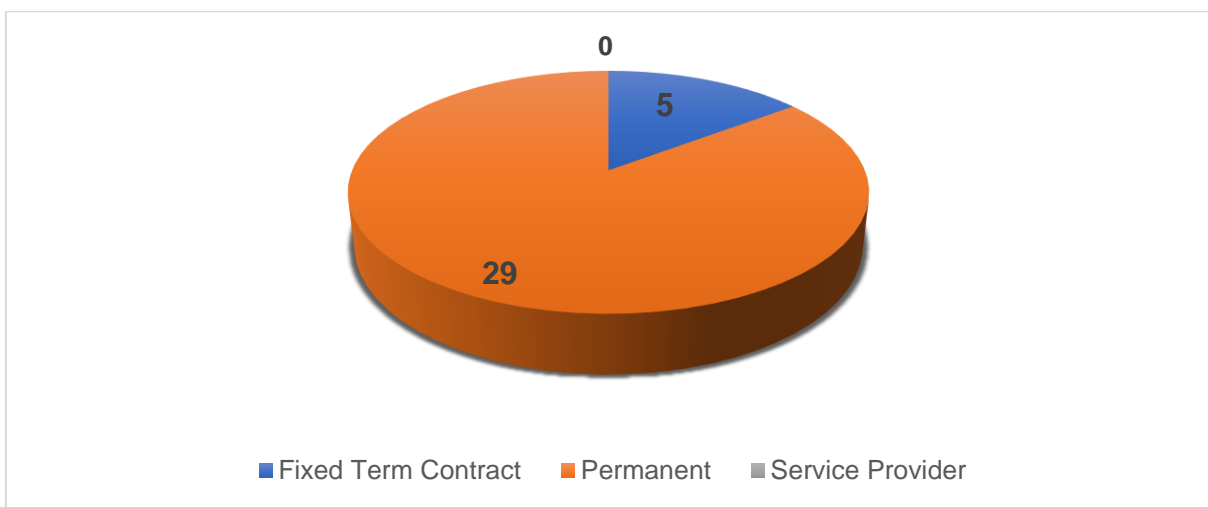
Figure 4.3.1.3: Employment category of participants

There were three employment categories listed. These made reference to the type of employment relationship that existing between the respondent and the organisation. The three categories were permanent employment, fixed-term contract employment and a service provider agreement. Of the 34 respondents, 29 were permanently employed, with the remaining 5 participants on fixed-term contracts. There were no participants employed on a service provider agreement.

While the employment type of the respondents is notable, it was not an aspect that weighed heavily in the choice of respondents.

- **In which part of the employee life cycle are you most involved**

As described in the literature review, multinational organisations' talent management strategy is usually broader than just recruitment and the development of talent. They are usually required to exercise a holistic approach to talent management. The talent management process is thus a multifaceted process with many sub-sections. With an organisation as large as the one chosen for this study, departments are segregated and responsible for one or more of these sub-sections. The departments with applicable roles and responsibilities appear in the next Figure, below.
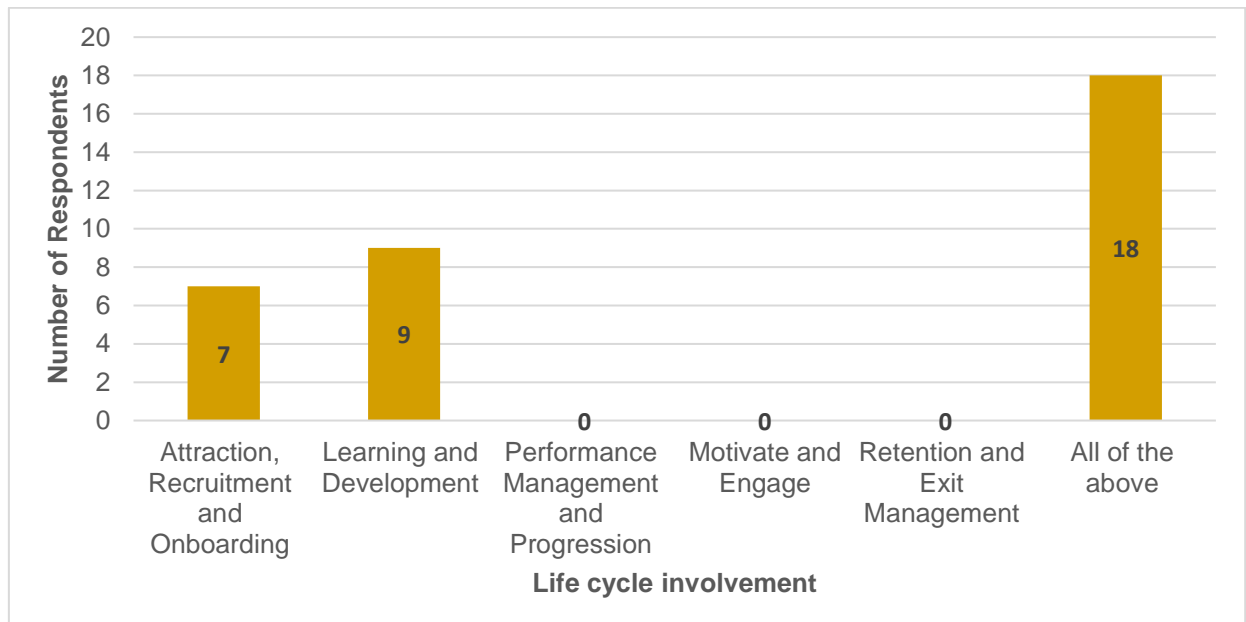
Figure 4.3.1.4: Participants' involvement in HR life cycle

Attraction, recruitment and onboarding

There were 7 respondents mostly involved in this aspect, which is concerned in part with how the organisation brands itself in the market. It includes working knowledge of the platforms and systems used to attract internal and external talent. These respondents are actively involved

in the recruitment and selection process for candidates joining the organisation. Once a successful candidate joins the organisation, the team is involved in ensuring that the individual is onboarded in their new business unit.

Learning and development

Falling into this category were 9 respondents. These employees are responsible for consulting with the business unit to establish learning needs and provide guidance on human performance needs. Moreover, they are responsible for developing and delivering learning initiatives, as well as methods of review that evaluate the effectiveness of learning.

Performance management and progression

Within this facet, individuals would focus on defining the performance management framework and its practical implementation. They would also assume authority for the rules and guidelines applicable to the progression of talent within the organisation. There were no respondents interviewed that focused only on this aspect.

Motivate and engage

In this sub-section, individuals would focus on key business culture initiatives. They would be responsible for creating and facilitating engagement and culture surveys, and for the analysis of trends from the data gathered. Thereafter, they would develop initiatives, forums and working groups to improve the general culture of the organisation. There were no respondents interviewed that focused only on this aspect.

Retention and exit management

Individuals who focus on retention and exit management primarily perform data analysis. They analyse exit interview data and analyse trends for exiting. This would include the timing of exits, the ages of people who exit and their reasons for exit. This data would then be used to propose retention solutions for a business unit. There were no respondents interviewed that focused only on this aspect.

All of the above

The following role is that of a human capital generalist. Respondents in this role are responsible for the end-to-end employee life cycle. They collaborate with recruitment, learning and data specialists where necessary. There was a total of 18 respondents in this category. What follows is an outline of the core roles and responsibilities such a respondent would have.

Human Capital strategy execution

Respondents are responsible for executing the strategic objectives of the Human Capital function. These objectives are derived from the segment's executive board on which the Human Capital executive would serve. The HC executive together with the executive board would decide on strategic employee initiatives and the HC generalist would partner with the business to deliver these objectives.

Business strategy execution

In addition to the above, generalists are immersed within the relevant business unit and would be responsible for supporting business strategy execution. Specific reference would be made to ensuring that the relevant teams are operating optimally within the organisational design and structure, and that they are equipped with the correct skills and talent to deliver on key business outcomes.

Industrial/ employee relations

Here the respondents are responsible for enforcing the disciplinary code applicable to all employees and for ensuring the company's compliance with legislation such as the Labour Relations Act, Basic Conditions of Employment Act and Employment Equity Act. They offer support and guidance to the business on industrial or employee relations matters. Standard work tasks may include facilitating disciplinary enquiries, grievance procedures and CCMA preparations.

Culture and engagement

Respondents manage culture and engagement surveys and encourage business units to partake in culture initiatives, often through delegation.

Performance management

Respondents are accountable for ensuring the business unit understands and applies the performance management process correctly and consistently. They bear responsibility for calibration sessions with senior executives to ensure a fair distribution of performance ratings. In addition, the respondents are responsible for guiding the business performance improvement process and if so required, the poor performance or ill health incapacity process. They also ensure that the business applies the progression and reward process consistently and correctly across the unit.

Remuneration

Respondents are responsible for ensuring that their business unit understands and applies all remuneration governance and principles fairly and accurately. They are involved in salary and benefit allocation for new joiners and are subsequently responsible for remuneration and benefits review annually.

Talent management

Respondents are responsible for supporting their business unit to win the war for talent, partnering with their management team to assess and understand the staff's performance, potential, career aspirations and opportunities for growth. They ensure management are upskilled to conduct talent management reviews and create personal development plans with employees. In addition, they facilitate assessments, rotations or secondments to encourage the internal growth of talent. They work closely with executive management to identify high performing individuals (HIPOs) and create accelerated development plans for them.

Recognition

Respondents are accountable for driving a culture of recognition and reward in their relevant business unit, and upskilling others in this regard. This includes fostering participation in recognition activities and award ceremonies.

Information management

Respondents involved in the practice of information management are sometimes referred to as human capital specialists or management information specialists. They are responsible for managing HR-related data. This includes aspects such as head count, turnover, employment equity impact and pay parity. They are responsible for developing dashboards that track progress and traction on various issues. These dashboards are used to inform executive human capital decisions.

Learning, training and development

Respondents work closely with the relevant learning, training and development teams to develop training or learning programmes appropriate to their business units. They also partner with internal and external stakeholders to ensure relevant industry-related training is delivered within the business. They oversee the development of business learning tracks in conjunction with the centre for learning.

Recruitment

Respondents partner with the recruitment team to ensure the business units understand recruitment governance and guidelines. They are responsible for ensuring that business units followed the correct processes to recruit and onboard new joiners.

Employee wellness

Respondents promote the wellness options available to employees. This includes ensuring the business units are offering employee wellbeing free counselling options, health and fitness talks as well as financial wellbeing advice.

The generalist role is a combination of all of the above practices.

- **Current job grade**
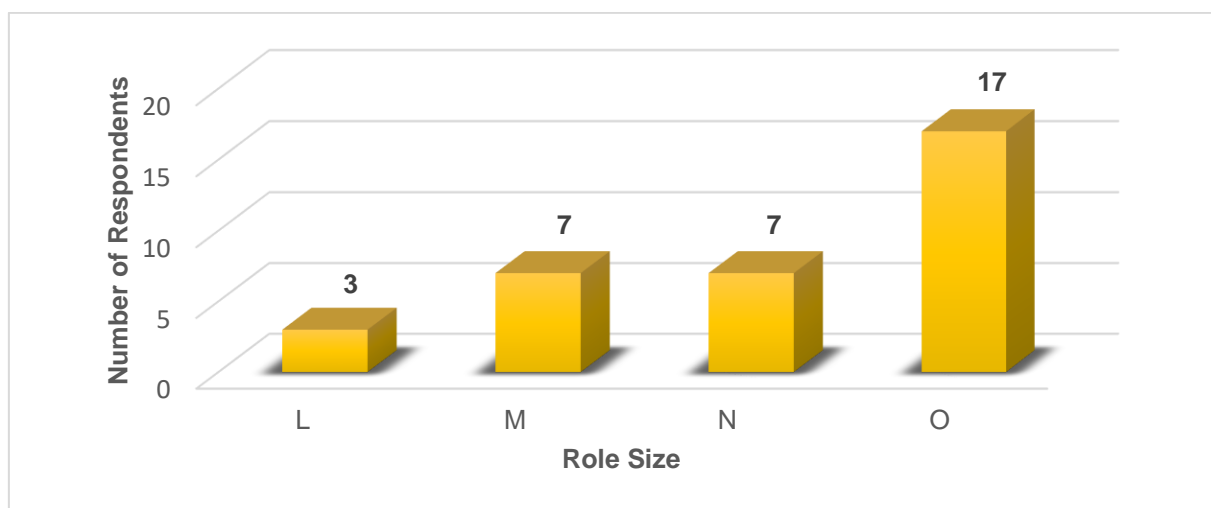
Figure 4.3.1.5: Job grade of participants

At the organisation under study, roles are graded. Each grade represents the theme and level of work at which the individual is required to operate. The job grades are categorised alphabetically. Roles start at the most junior level of role size L, then move upward to executive level at role size T. Of the 34 respondents, 3 were at role size L, 7 at role size M, 7 at role size N, and 17 at role size O.

- **Number of years in the organisation**
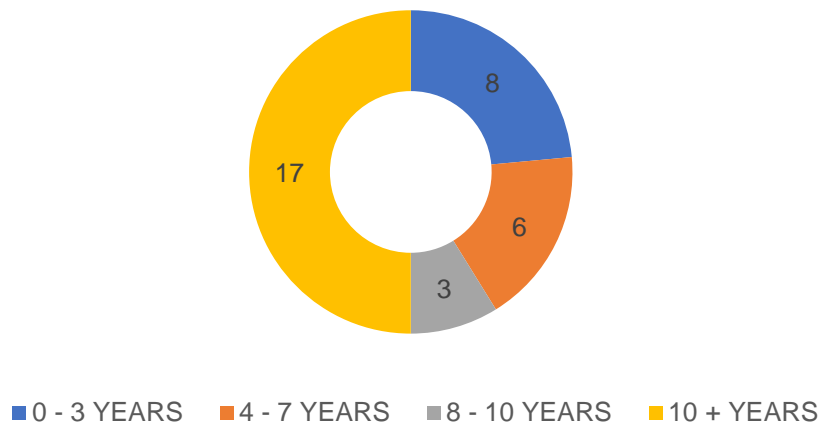
Figure 4.3.1.6: Participants' tenure

Respondents' number of years of employment in the organisation was reduced to one of four periods. In the first period of 0–3 years, there were 8 respondents. In the second period of 4–7 years, there were 6 respondents, and in the third of 8-10 years, there were 3 respondents. As many as 17 respondents fell into the fourth and longest period of over 10 years. Length of service was not a major consideration in the selection of the sample for interview.

4.3.2 Section B: Attraction, recruitment and onboarding

The following section analyses the data from Section B, which comprised questions about the attraction, recruitment and onboarding of employees.

Question 1:
Explain what skills would be considered as scarce skills within your business unit.
The following word cloud lists the skills considered scarce across the four segments.

Figure 4.3.2.1: Scarce skills graphic presentation

Question 2:
What attraction methods are used within your business unit?

LinkedIn

Oracle I-recruit

Agencies

Networking and Referrals

Graduate Attraction Events
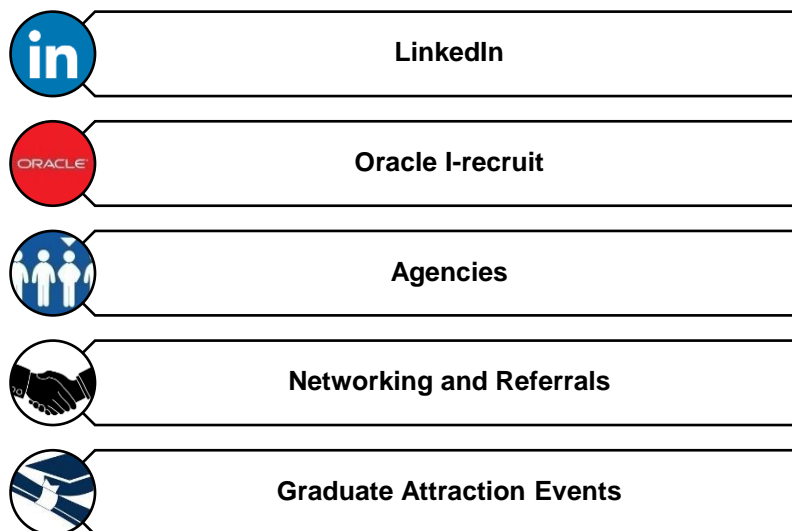
Figure 4.3.2.2: Attraction methods graphic presentation

A significant majority of 21 out of the 34 respondents cited LinkedIn as an attraction method within their business unit. Then, 18 respondents made mention of the internal recruitment system called oracle I-recruitment. A further 11 respondents mentioned referrals, networking and reaching out to industry contacts as methods of attraction within their business units. Consulting houses and agencies were cited by 5 respondents. Finally, 7 respondents referred to their unit's use of graduate attraction events. What is noteworthy is that a large majority of

the respondents indicated more than one attraction method being used within their business unit.

Question 3:
What are your targeted media for talent and passive scarce-skilled employees?
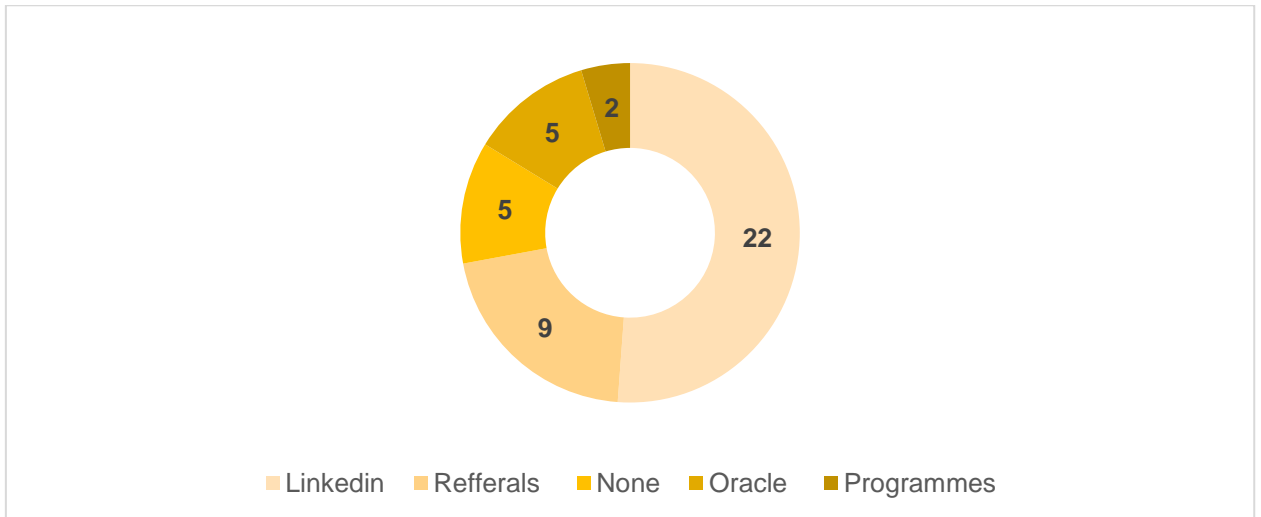
Figure 4.3.2.3: Targeted media graphic presentation

A total of 22 of the 34 respondents indicated that their targeted medium for passive and scarce skilled employees was LinkedIn. Then, 9 respondents indicated the use of some sort of employee or staff referral. The internal oracle I-recruitment website was used by 5 respondents, while 2 respondents reported that specialised programmes such as graduate programmes or innovation initiatives were used to attract those with a scarce skill. A final 5 respondents indicated that no medium in particular was used to attract scarce-skilled talent. A significant majority of the respondents named more than one target medium.

Question 4:

How visible and attractive is your brand in the market within which you operate?

Is the brand attractive and visible in the market?
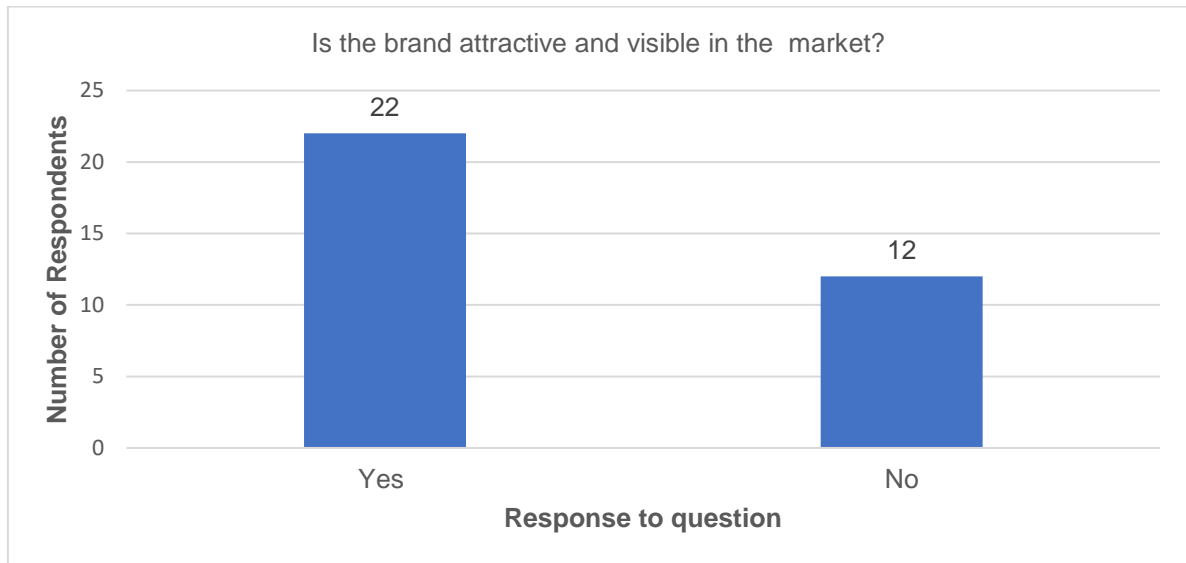
Figure 4.3.2.4: Brand attractiveness graphic presentation

In response to this question, 22 respondents indicated they thought the brand was visible and attractive in the market. The remaining 12 respondents indicated they did not think the brand had the necessary visibility or attractiveness required in the market.

Question 5:

Rate your satisfaction level with the current Oracle I-recruitment system.
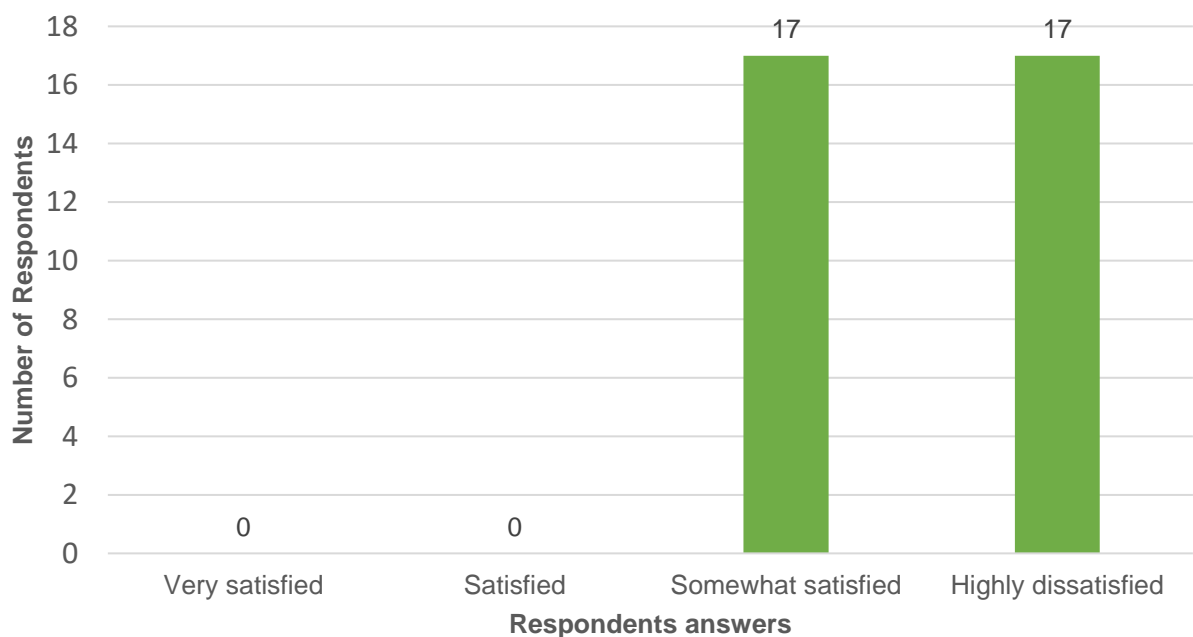
Figure 4.3.2.5: Graphic presentation of satisfaction level of recruitment system

In response to this question, respondents made use of only two of the four available ratings. In rating their level of satisfaction with the oracle I-recruit system, a total of 17 respondents rated it a 1, indicating that they were highly dissatisfied with their experience on oracle. The remaining 17 respondents rated their satisfaction level a tentative 2, indicating they were 'somewhat satisfied' with their experience of the internal oracle i-recruitment system. No respondents made use of 'satisfied' or 'very satisfied'.

Question 6:

Are you able to use the oracle I-recruitment system to target passive scarce skilled candidates?

| 0%
respondents indicated oracle could be used. | 100%
respondents indicated oracle could not be used. |
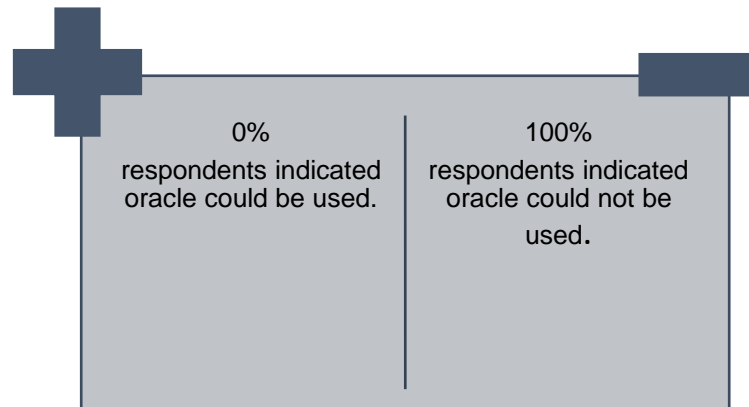
Figure 4.3.2.6: Graphic presentation of recruitment system usage

The full complement of respondents indicated that they were unable to use the oracle I-recruitment system to target passive scarce skilled candidates.

Question 7:

Does the Oracle I-recruitment system allow for engagement with candidates?
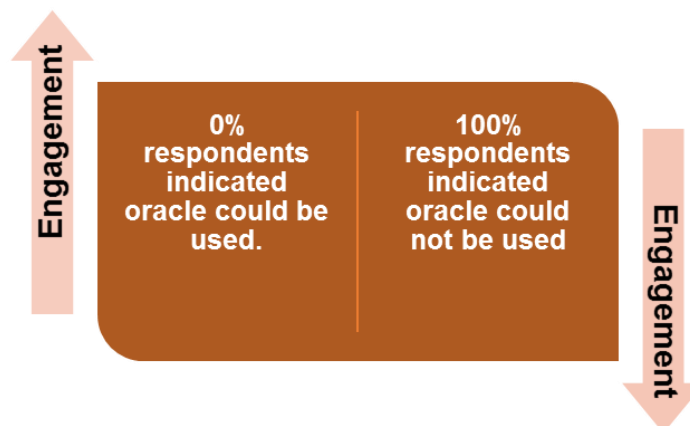
Figure 4.3.2.7: Graphic presentation of engagement on the recruitment system

In response to the question of whether the system allowed for engagement with candidates, 34 out of 34 respondents indicated it did not.

Question 8:

Has your business unit utilised artificial intelligence systems to attract and recruit?
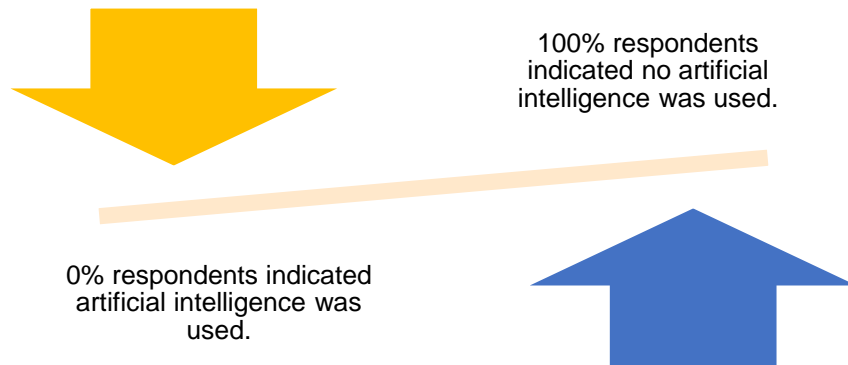
Figure 4.3.2.8: Graphic presentation of the use of artificial intelligence

All the respondents indicated that they were not aware of any sort of artificial intelligence being used to attract or recruit within their business units.

Question 9:

What type of training has been provided to HR Practitioners in terms of attracting talent, recruiting talent and onboarding talent?
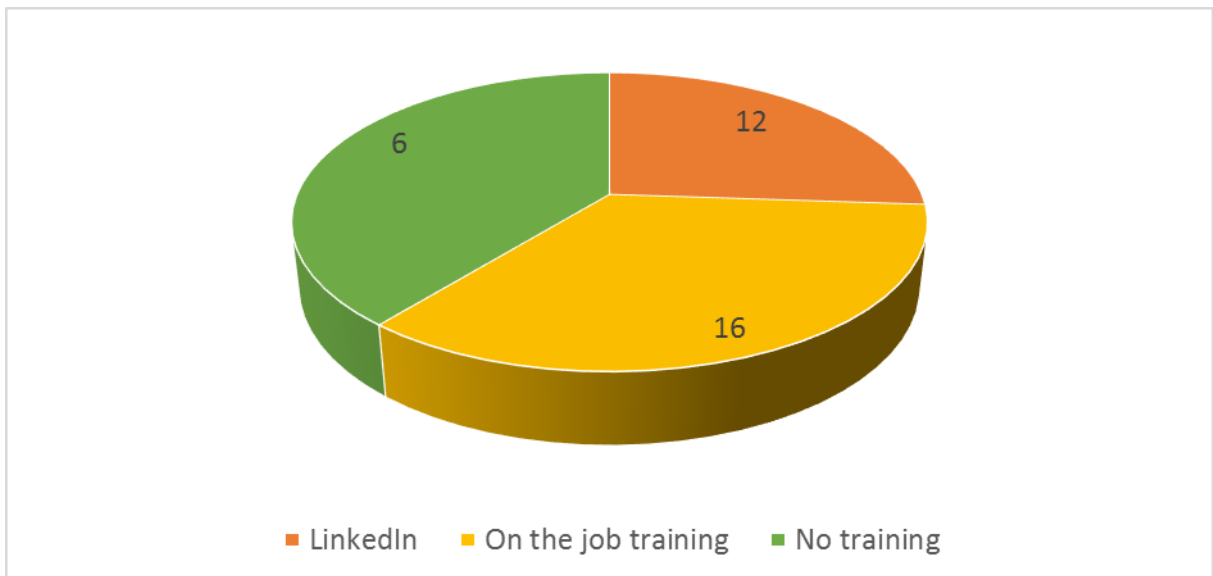
Figure 4.3.2.9: Graphic presentation of HR training offered

A total of 12 respondents cited LinkedIn training as having been offered within their business units. Another 16 respondents referred to internal or on-the-job training as being the most common training offered to the HR practitioners. A minority of 6 respondents were unaware of any sort of training being provided to HR practitioners regarding attracting, recruiting and onboarding talent.

Question 10:
In your opinion, do you believe the current attraction and recruitment practitioners have the relevant skills set to attract and recruit scarce skilled/talented employees?
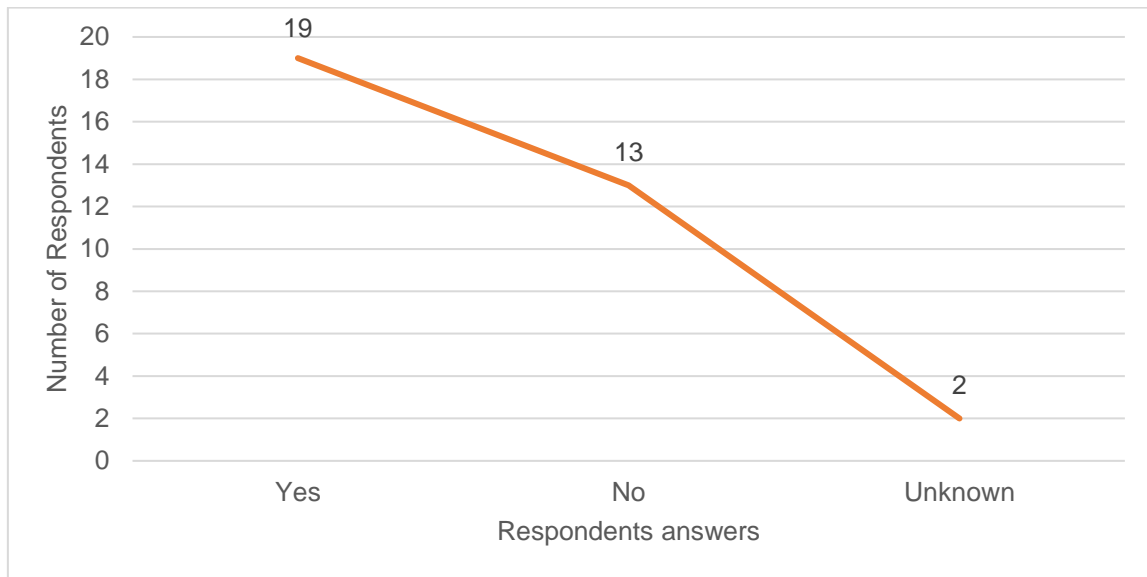
Figure 4.3.2.10: Graphic presentation of HR skill set

A total of 13 respondents indicated they did not believe that the current attraction and recruitment practitioners had the relevant skills set to attract and recruit scarce-skilled / talented employees. Two respondents acknowledged they were unable to say with any certainty whether the practitioners held the skills required to source scarce-skilled employees. The remaining 19 respondents felt that the current attraction and recruitment practitioners did possess the skills needed to attract and recruit scarce-skilled / talented employees.

Question 11:
In your opinion, what do you believe OM should adapt or change in order to attract and recruit scarce-skilled/ talented employees in your business unit?

Three key themes emerged from the data, as represented graphically below:
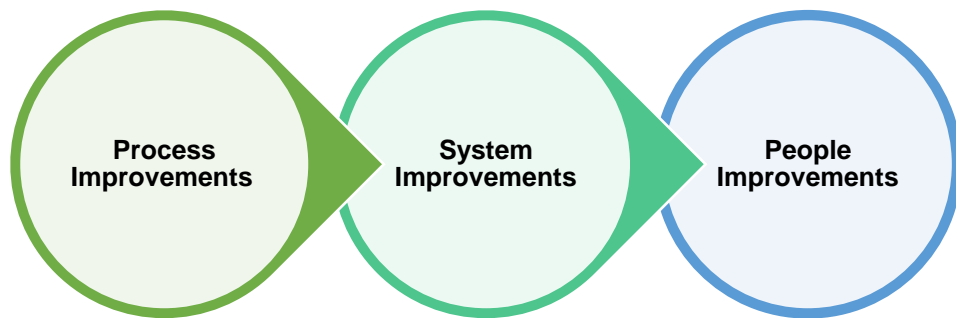
Figure 4.3.2.11: Graphic presentation of recruitment improvement suggestions

• Process improvements

  – suggestions and recommendations associated with improving the attraction, recruitment and onboarding process

• System improvements

  – suggestions and recommendations associated with enabling and enhancing systemic experience for both talent acquisition teams and candidates during the attraction and recruitment phase

• People improvements

  – suggestions and recommendations associated with improving the skill sets, capabilities and competencies of those who facilitate the attraction, recruitment and onboarding process.

4.3.3. Section C: Learning, training and development

Question 1:
How are learning, training and development needs identified in your business unit?
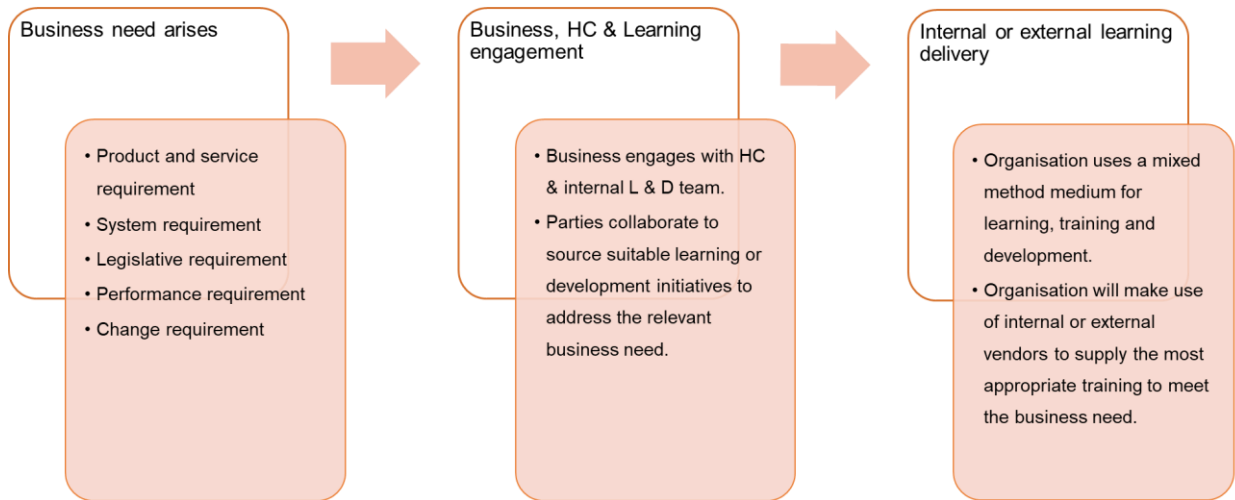
Figure 4.3.3.1: Graphic presentation of learning needs identification

The graphic above depicts the process common to all units in which learning, training and development needs are identified.

Question 2:
What types of vendors are often used to deliver learning, training and development initiatives?

- *Internal Training and Development Department*
- *Informal internal learning/ coaching & mentoring*

- *External Technical Service Providers*
- *External tertiary/ technical institutions*
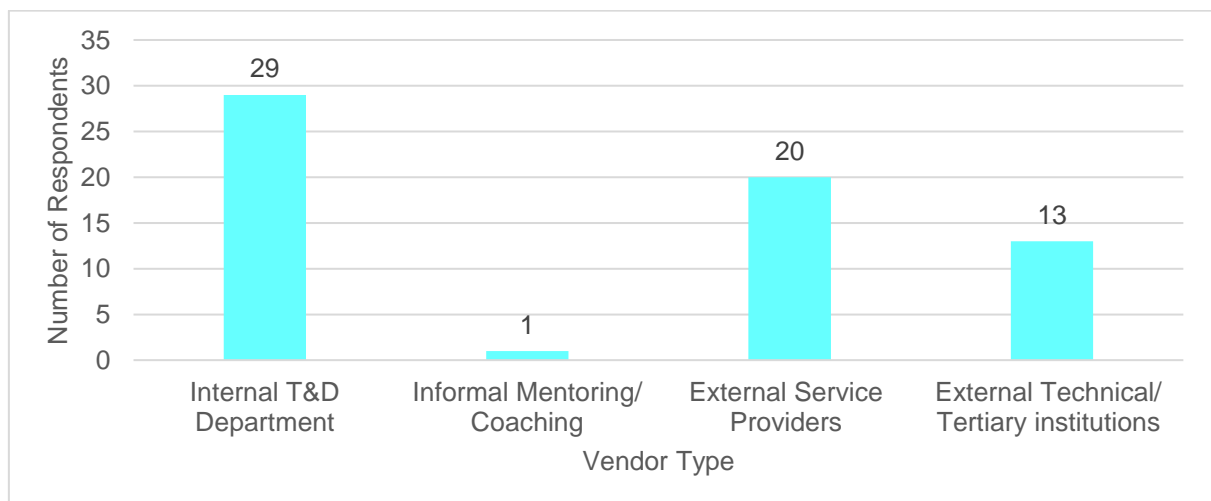
Figure 4.3.3.2: Graphic presentation of vendor usage

The bar graph above depicts how many respondents indicated their use of which vendors. A significant majority of respondents indicated the use of more than one vendor in their business unit.

Question 3:

Do the business units have the budget allocation/funding necessary to introduce the required learning, training and development?
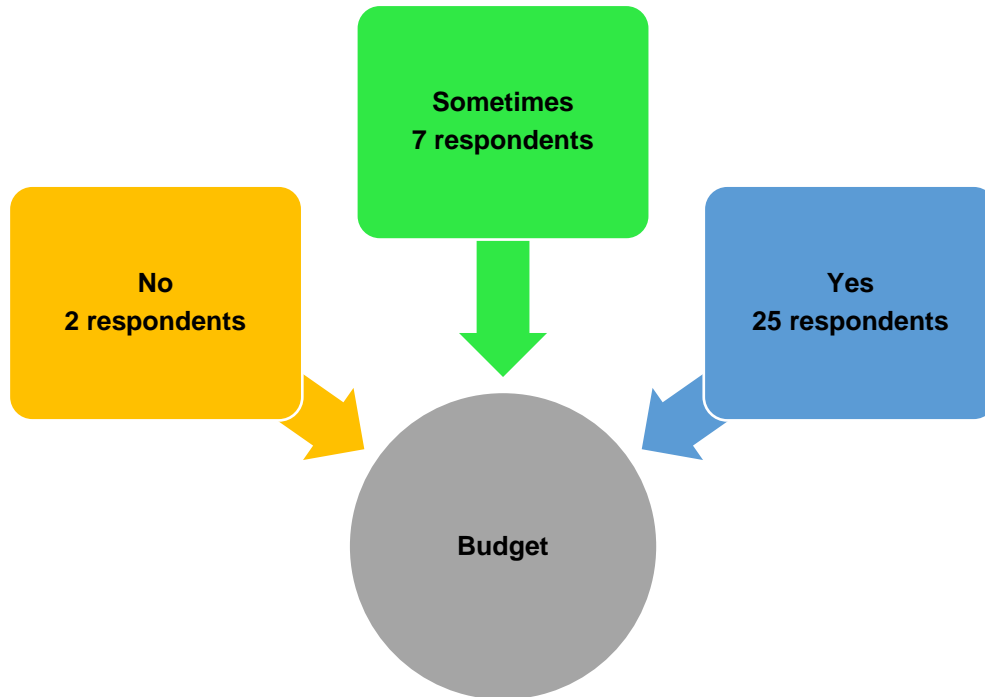
Figure 4.3.3.3: Graphic presentation of funding allocation

An overwhelming majority of respondents indicated that the segments had the necessary budget to fund training. The remaining responses reported a mixture between the budget being available sometimes and not at all.

Question 4:

In your opinion, is the internal training and development team equipped to train and develop newly identified scarce-skilled employees?
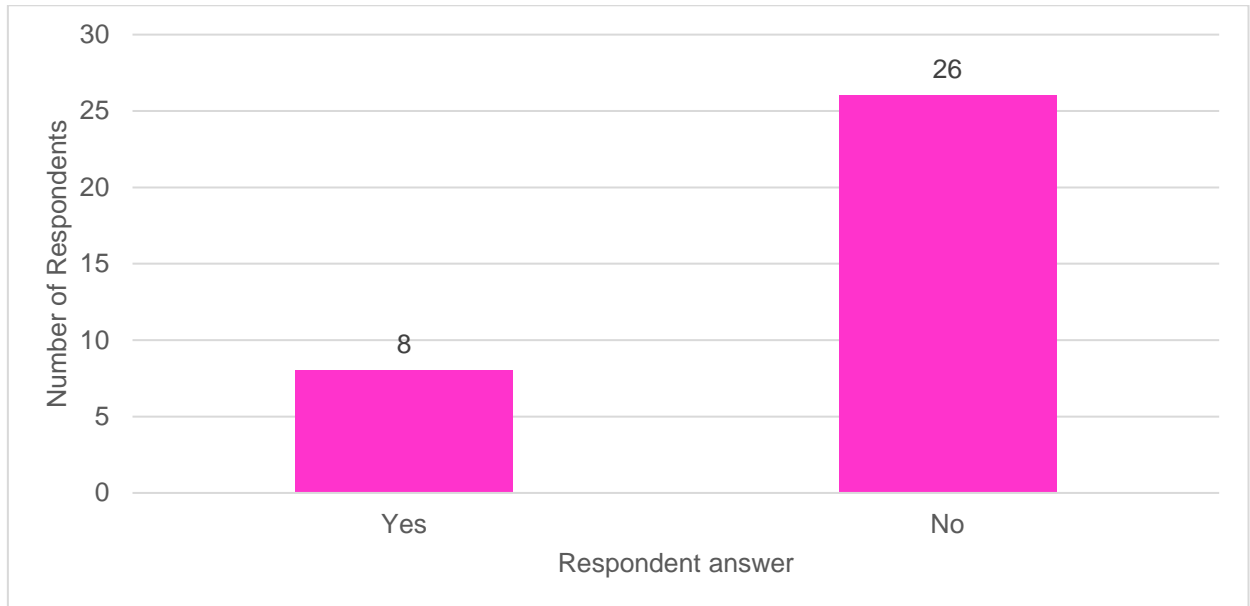
Figure 4.3.3.4: Training skill set graphic presentation

The graph above indicates that 26 respondents believed that the training and development team was not adequately equipped to train newly identified, scarce skilled employees. The remaining 8 thought they were.

Question 5:

In your opinion, what do you believe OM should introduce or acquire to train and develop newly identified scarce skills?

As was the case with the answer to Question 11 in the previous section, three key themes emerged from the data:
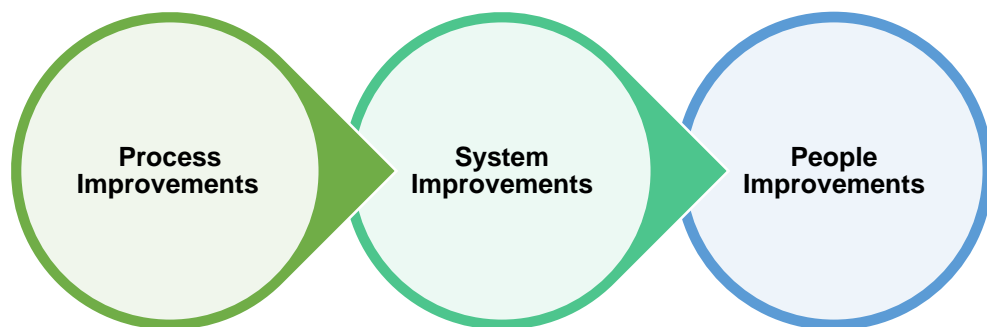
Figure 4.3.3.5: Graphic presentation of training improvement suggestions

- Process improvements
  - suggestions and recommendations associated with improving the attraction, recruitment and onboarding process

- System improvements
  - suggestions and recommendations associated with enabling and enhancing systemic experience for both talent acquisition teams and candidates during the attraction and recruitment phase

- People improvements
  - suggestions and recommendations associated with improving the skill sets, capabilities and competencies of those who facilitate the attraction, recruitment and onboarding process.

The next section provides the findings of section D of the interview guide, concerning retention.

4.3.4. Section D: Retention

Question 1:

Based on exit interview feedback, what are the main reasons talented and scarce-skilled employees leave the company?

Lack of growth and promotional opportunities	Relationship with supervisor/ management	Lack of challenging work or rotational opportunities	Poor implementation of performance management

Lack of career pathing	Misalignment between organisational and personal goals and vision	Compensation & Benefits

Figure 4.3.4.1: Exit reasons graphic presentation

In response to the question, the respondents identified the above as among the reasons talented and scarce-skilled employees leave the company. An overwhelming majority of respondents mentioned more than one reason in their feedback.

Question 2:

In your opinion, do employees find the total guaranteed package attractive?
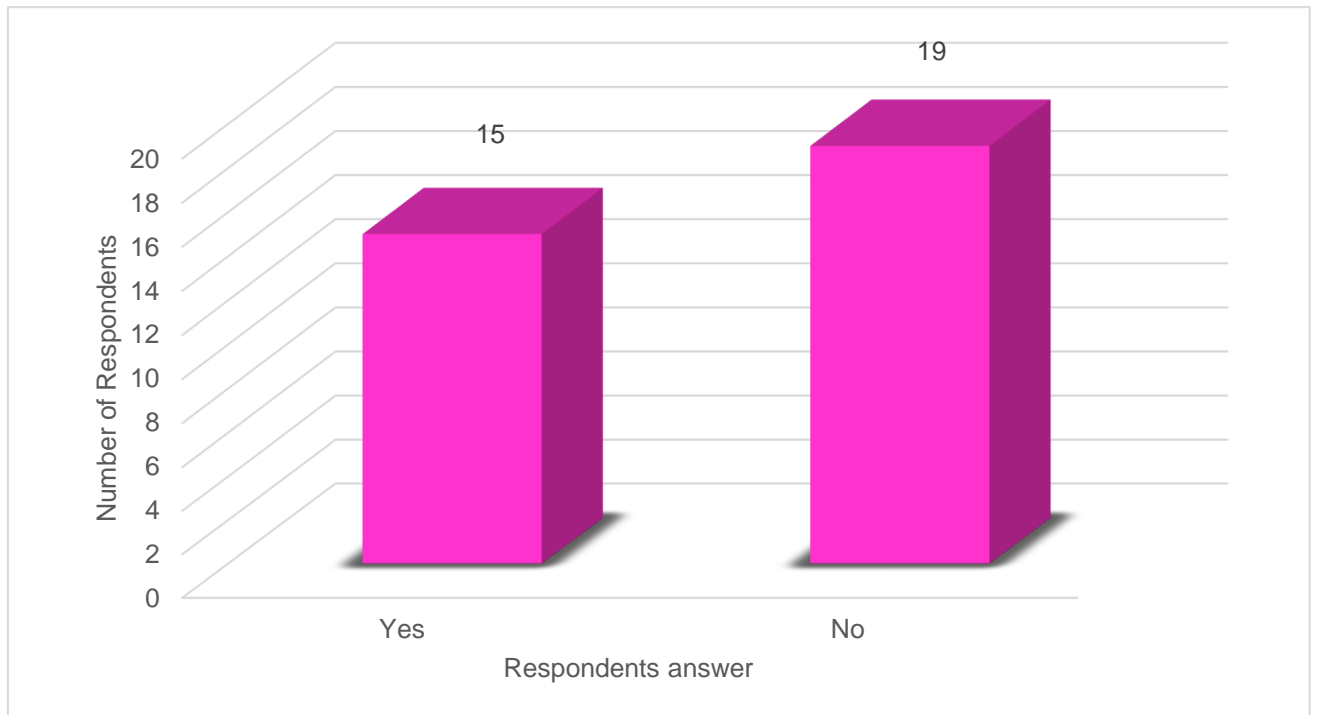
Figure 4.3.4.2: Graphic presentation of package attractiveness

The above indicates that a total of 15 respondents indicated yes to the question, while the remaining 19 indicated no. A big majority of respondents justify their responses.

Question 3:

In your opinion, is the workforce engaged and passionate about working for the company?
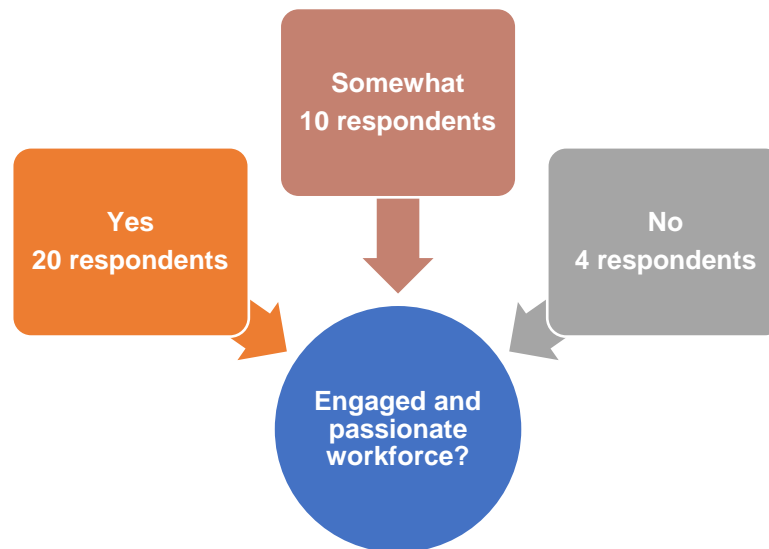
Figure 4.3.4.3: Graphic presentation of workforce engagement and passion

There was divergence amongst the respondents. The majority of them indicated that employees were engaged and passionate for several reasons, while the remainder felt that employees were no longer engaged and passionate.

Question 4:

In your opinion, are employees experiencing an encouraging work culture?

**Yes
19 respondents**

Encouraging work culture?

**No
15 respondents**
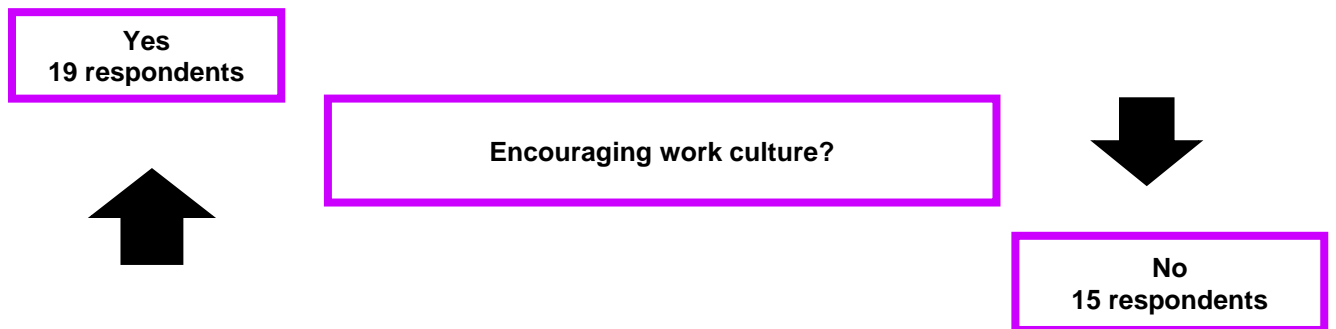
Figure 4.3.4.4: Graphic presentation of work culture

A total of 19 respondents agreed that employees were experiencing an encouraging work culture, while 15 answered no to the above question. They described what they thought contributed to a positive and discouraging culture for employees.

Question 5:

What current retention strategies are utilised in your business unit?

Share Allocation

Secondments / Rotations

Learning and Development opportunities

Bonus Allocation

Counter offers

New role/ progressions

Recognition
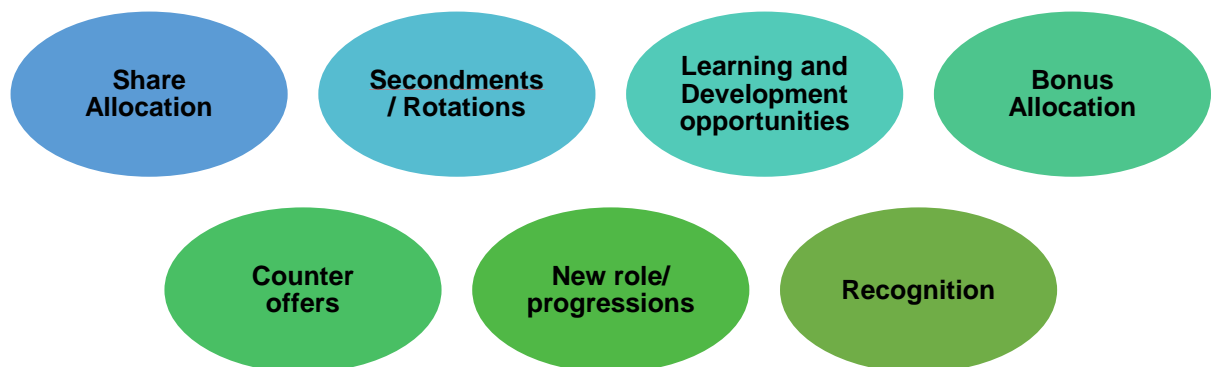
Figure 4.3.4.5: Graphic presentation of retention strategies

Based on respondents' answers, the figure above represents the retention strategies most often used across the organisation. An overwhelming majority indicted the use of more than one strategy.

Question 6:

Are you aware of any of the following modern techniques being utilised within your business area?

- *Management Monitoring*
- *HR Retention Metrics*
- *Transparent communication*

Transparent communication	Management monitoring	HR Retention Metrics
Yes 11 respondents	Yes 23 respondents	Yes 20 respondents
No 23 respondents	No 11 respondents	No 14 respondents
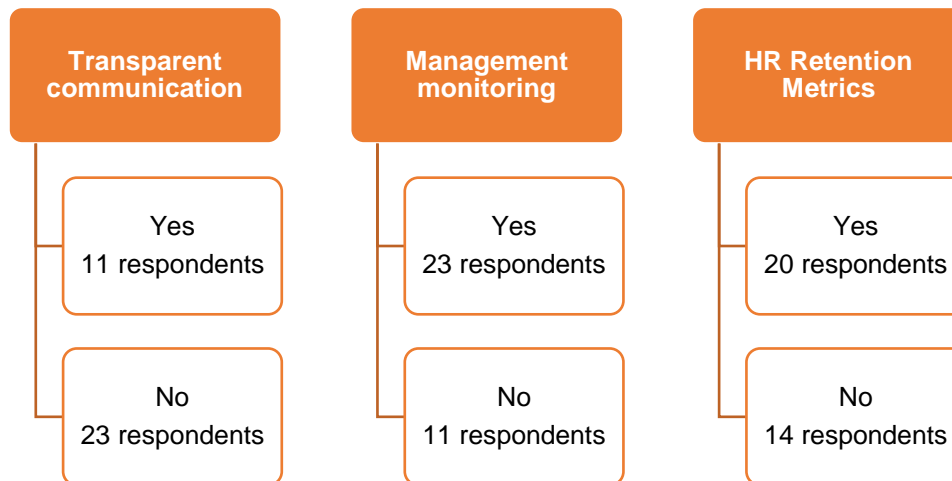
Figure 4.3.4.6: Use of modern retention techniques graphic presentation

The responses to the above question were divided, for all three modern techniques listed. With regard to transparent communication, 23 respondents disagreed that it was practised, while the remaining 11 answered yes. For management monitoring, the majority of the respondents (23) indicated that it was indeed practised, while the 11 indicated that it was not. In relation to HR retention metrics, 20 respondents indicated that this was in use, but another 14 respondents indicated its absence from their business units. The responses varied across segments.

Question 7:

What innovative methods would you recommend the organisation should consider to retain talented and scarce skilled employees?

Three key themes emerged from the data:
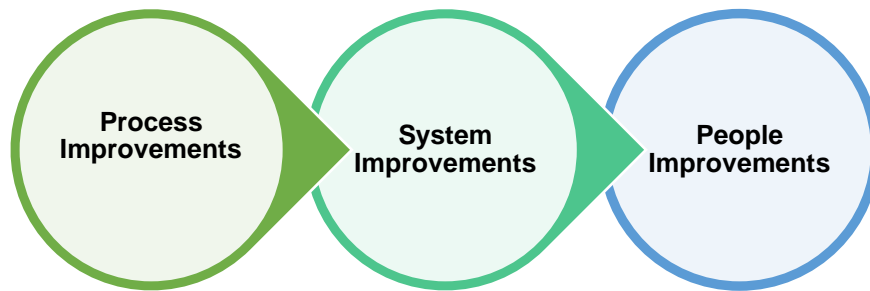
Figure 4.3.4.7: Graphic presentation of retention improvement strategies

- Process improvement
– Suggestions and recommendations associated with the process of retention.
- System improvements
– Suggestions and recommendations associated with the system used to reward employees.
- People improvements
– Suggestions and recommendations that were associated with improving the skill sets, capabilities and competencies of those who develop retention strategies within the business units.

The following section offers findings for the final section of the interviews, concerning the business impact.

4.3.5 Section E: Business impact

Question 1:

Has the talent management process added value in your business? Use the rating scale below.

- *Extremely effective*
- *Moderately effective*
- *Slightly effective*
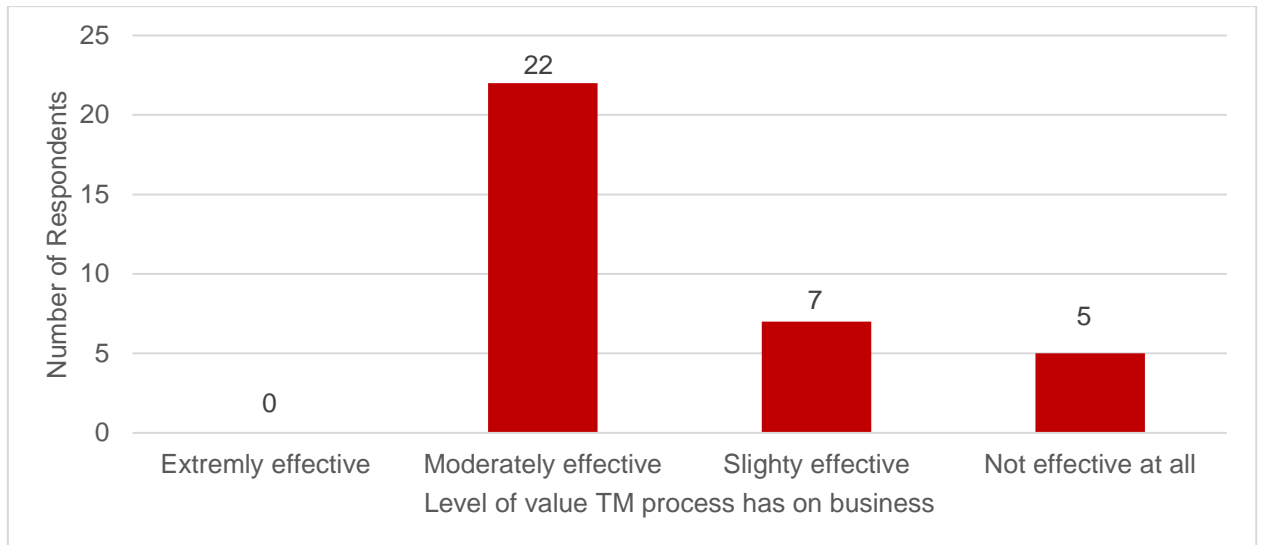
Figure 4.3.5.1: Graphic presentation of talent management value

The bar graph above represents respondents' feedback to Question 1. A total of 22 respondents indicated that the talent management practice was moderately effective, 7 respondents characterised it as slightly effective and the remaining 5 thought the process was not effective at all.

Question 2:

Has any of the following been negatively impacted by the current talent management process?

- *Financial position*
- *Time taken to go to market with innovative product or service offerings*

- *Brand reputation*
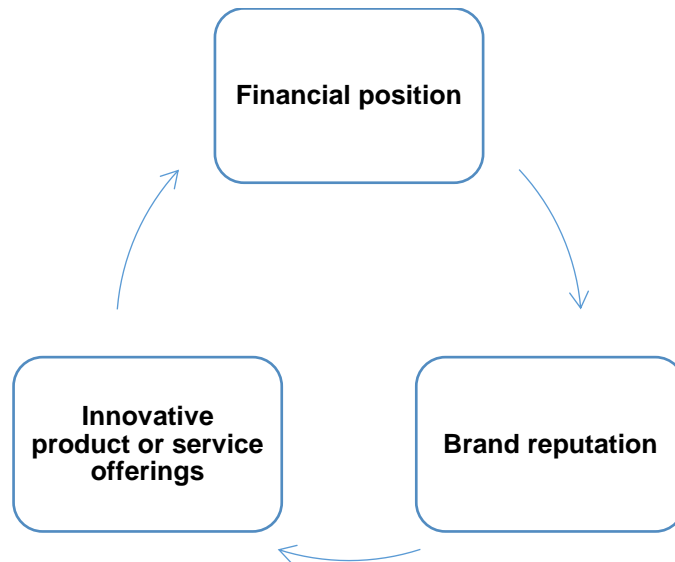
Figure 4.3.5.2: Graphic presentation of talent management influence

An overwhelming majority of respondents indicated that the talent management process had an adverse impact on all three aspects listed.

Question 3:

In your opinion, has the current talent management contributed to the loss of scarce-skilled employees?
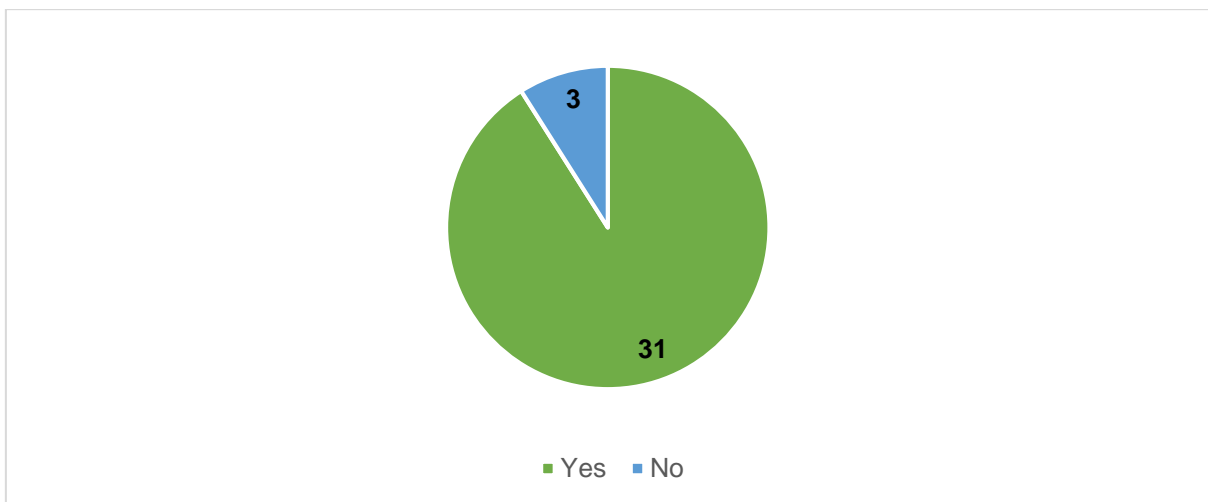
Figure 4.3.5.3: Graphic presentation of talent management impact

The chart above represents shows that an overwhelming majority of respondents felt that the talent management process had contributed to the organisation's losing scarce-skilled employees. Only 3 respondents did not share this view.

4.4. Summary

This chapter presented, mainly in summary graphic form, the copious data gathered from the respondents' answers to the questions in the interview guide.

The following chapter offers a comprehensive discussion of the findings presented in this chapter.

CHAPTER 5:
RESEARCH DISCUSSION
5.1 Introduction

DePoy and Gitlin (2020:310) explain that in qualitative research analysis, the researcher begins by examining the data systematically, trying to gain a sound overview of the opinions and experiences of the participants. This leads to a consideration of how the data is able to answer the research question.

Key themes and trends emerged from answers received in the semi-structured interviews. The following discussion will therefore aim to highlight what core discrepancies were identified within respondents' views of talent management practice at the relevant organisation. The discussion will follow the structure of the interview guide, attending to (a) Generic biographical data, (b) Attraction, recruitment and onboarding, (c) Learning, training and development, (d) Retention and (e) Business impact.

5.2 Discussion of findings
5.2.1 Section A: Generic biographical data

As displayed in the graphic representations, there were both males and females in the sample, with a preponderance of females. There was a similar mix in terms of first languages, employment types, years of service and job grades. Although these differences were potentially significant, they were not crucial to the choice of respondent, which was based primarily on the part of the employee life cycle in which they were most involved. Respondents were thus carefully selected according to their role or years of experience in a particular part of the employee life cycle. The researcher was confident that respondents would have had some experience of working in a team with access to scarce-skilled employees.

The semi-structured interview had 3 specific sub-sections relating to talent management: (1) Attraction, recruitment and onboarding; (2) Learning, training and development, and (3) Retention. To gain in-depth insight into the sub-section of attraction, recruitment and onboarding, 7 talent acquisition specialists were interviewed. These respondents had ready access to information about attraction methods and media used. They were also key role players in the recruitment of scarce-skilled talent and partnered very closely with the generalist HC business partners to onboard such individuals.

Next, 9 specialists in learning, training and development were interviewed. They had key knowledge about the training of suppliers, vendor management, training budget allocation and the system used to manage training and development within the relevant segments.

Finally, 18 respondents in human capital generalist roles were interviewed. Their exposure to all the policies and practices within the relevant segment made for a wealth of knowledge and practical experience of what is lacking across the full talent management cycle. These individuals were able to answer questions regarding retention, for example, because this was one of the core objectives in their business units. Moreover, most respondents in this category were seasoned human capital business partners, with years of experience in all the practices listed. The researcher viewed this as an advantage because respondents were able to judge how talent management practices had or had not evolved over the years, and what the impact of this had been on the business.

The researcher also purposefully selected human capital business partners allocated to business units where critical and scarce-skilled employees were hosted. These human capital business partners supported areas such as Digital and Data, Actuarial Science, Information Technology, Product Development, Financial Governance, Sales Management and Robotics. This uniquely qualified the respondents to provide information that would allow the researcher to achieve the main objective of the research, which was to determine if a lack of innovative talent management processes had led to a substantial loss of talented critical and scarce skills at the relevant organisation.

5.2.2 Section B: Attraction, recruitment and onboarding

The research study focused primarily on employees at the relevant organisation who are considered top talent or who hold a very scarce skill. It was therefore important to ascertain what the respondents classified as a scarce skill within their business unit. The following posts or roles were identified:

Information Technology (IT)-related: Developers, programmers, IT architecture, information security professionals, cyber security professionals, DevOps, Agile, Cloud, software engineering, digital architects, robotics and process engineers.

Data, digital and analytics-related: Data analytics, data science, UX designers, UI designers, digital design, agile coaches and Scrum masters.

Sales and Management: Corporate governance, E-commerce, be fit and proper financial advisors, actuaries, sales managers, general management, EE leadership and product development specialist.

Soft skills: Problem solving, critical thinking, creative thinking, leadership, behavioural economics and design thinking.

Most of the scarce skills listed above are skills required for the organisation to move to 'the new world of work'. The literature review referred to the fourth industrial revolution, an evolving

world of machines with new capabilities that requires people with new capabilities. The skills considered scarce are skills that are crucial to the advancement of digitisation in the working world.

Within subsection B on attraction, recruitment and onboarding, questions 2, 3 and 4 made specific reference to attraction in the relevant organisation. The data suggests that the majority of business units make use of the traditional portals available within the organisation. LinkedIn licenses are purchased across the organisation, and as indicated by 21 respondents, it is evident that the tool is widely used. Another 18 respondents reported that the traditional internal oracle I-recruitment site was also utilised. The numbers dwindled when respondents referred to more innovative methods, such as making use of industry contacts or reaching out to consulting houses that specialised in in-sourcing for a scarce skill. Also evident was that the majority of the business units make use of a mixed approach to attraction, often employing more than one method.

From comments made by respondent 2 – *I don't think we are as active as what we should be*; respondent 10*, Yeah, we haven't done anything different. Anything wild. It's pretty standard*; respondent 11, *We're very reactive*; respondent 14*, "Pretty much the same thing everyone does*; respondent 22, *I think we're still very old-school in the way of thinking*; respondent 32 *I'm not aware of anything that recruitment is doing that is over and above . . .* – it is evident that the respondents have not essayed any innovative means of attracting talent within their business units. The organisation thus remains highly dependent on one primary means to source candidates with scarce skills, which is LinkedIn. Only a few business units have made use of new or alternative media like the innovation programmes.

Then, regarding brand attractiveness, 22 respondents (a large majority) believed their brand was considered visible and attractive within their relevant market. The brand's attraction was attributed in part to its longevity. Comments quoted below from respondents 7,14, 16, 17, 19 and 25 all referred to the brand's being viewed as trustworthy in the financial arena because of how long the company had been in existence:

- *I think in the financial services industry itself, the original OM brand is quite an astute brand.*
- *The brand is trusted by many.*
- *Everyone knows the brand is strong and it's been there for years and lots of people work there for years.*
- *From a legacy point of view, it's very attractive.*
- *People trust the brand.*
- *… people see it as trustworthy, a brand they know and recognise.*

In contrast to the above, respondents who indicated the brand was not visible or attractive specifically cited its lack of appeal to the new type of scarce-skilled employee that the organisation is now required to attract in the new world of work. Their comments included: Respondent 1: *From an IT and digital and data perspective, it's not visible*; Respondent 2: *We are associated with old world and not the future*; Respondent 4: *In terms of a talent brand name, I feel like we pretty much lacking*; Respondent 11: *It's not visible, like I said, in the forums where the scarce skills people operate*; Respondent 13: … *with the industrial revolution going around, we need to re-invent the brand faster*; Respondent 20*: I do believe our brand needs a better focus on attracting millennials*; Respondent 26: *The brand is not necessarily attractive to those with scarce skills.* Respondent 26 agreed that the brand was visible and attractive, yet later conceded that the brand was not as attractive to those with scarce skills.

The above indicates that the organisation's brand does indeed have strong visibility and attractiveness, but only in its 'natural habitat': that is, the brand is revered and renowned within the traditional financial services sector. Where it lacks attractiveness and visibility is among those who own what are now regarded as scarce skills. The brand lacks the appeal to penetrate the millennial or younger generation, who have the most technologically advanced skill sets.

The subsequent questions 5, 6, 7 and 8 were concerned with the recruitment and onboarding processes and the systems that enable them. To facilitate the recruitment process, the organisation makes use of an internal recruitment system called oracle I-recruitment. The system is the primary recruitment engagement model across the four segments surveyed. Respondents were asked to rate their satisfaction level with the system on a four-level scale. They only made use of levels 1 and 2 to describe their satisfaction, and their comments were much alike. Respondents who rated their satisfaction level a 1 described the system as: Respondent 1: *nothing proactive about the system*; Respondent 2: *the system is very inflexible*; Respondent 4: *It is not user friendly*; Respondent 8: *The system always freezes*; Respondent 9: *It was very reactive*; *Respondent 14: the same glitches year in and year out*; Respondent 18: *it requires a lot of manual prompting*; Respondent 21: *The system is complicated*; Respondent 26: *It is a very archaic system*; Respondent 28: *The system is a very outdated system*; Respondent 30: *the tool, it is not easy to navigate,* and Respondent 34: *it is not very user friendly.*

Respondents who rated the system a 2 acknowledged that the system was well-known in the organisation and used widely. But like those quoted above, these respondents indicated their dissatisfaction with the functionality and use of the system: Respondent 3: *it covers the basics, that's about it*; Respondent 10: *I guess it covers the bare basics*; Respondent 16: *I wouldn't*

say completely satisfied with the system, but it is the known in the Old Mutual context; Respondent 23: *Well there isn't an alternative to the system just yet, so we have to be satisfied with what we have*; Respondent 24: *I think the system is okay, it does the basics*; Respondent 31: *I know a lot of applicants have also been complaining about the system.* It appears from their comments that the majority of the respondents are not satisfied with the internal recruiting system available to them.

As far as targeting passive and scarce-skilled candidates is concerned, all the respondents indicated that they were unable to use the oracle I-recruitment system to do this. In most cases, they blamed the limited functionality of the system. Respondents 1, 5, 8, 10, 15, 17, 21, 26, 27 and 34 all referred to various aspects of the system that proved a hindrance in targeting passive candidates. For respondents 1 and 15, it is a standard system suitable only for traditional recruitment purposes. Respondent 5 added that the system was not designed for targeting passive candidates but rather for tracking applications. Respondent 34 pointed out that the system does not allow for remote work off the organisation's internal network, which means that it does not work after hours when passive candidates might be available to engage. Another aspect raised by respondents 8, 10 and 17 were the technical bugs within the system, together with the facts that it was not user friendly, was not easy to navigate, and did not pick up duplications. Respondents 21 and 26 complained about the aesthetics of the system. They felt that the system was unattractive and they would not feel confident about using it as an engagement mechanism for passive candidates. All these drawbacks discouraged the recruiters from using the system to target passive candidates. LinkedIn remained the primary method for contacting passive candidates.

Two other themes emerged in the feedback regarding the use of the oracle I-recruitment system generally. The first is that respondents indicated that emails, WhatsApps and telephone calls were the preferred methods of engagement. A total number of 12 respondents referred to these as the primary method of communicating with candidates. They were more convenient and could provide real-time access to candidates in terms of providing status updates or requesting documentation. The second theme echoed the problems that respondents reported with using the oracle system for targeting passive candidates. Respondent 8 made reference to experiencing too many technical issues with the system, which rendered it not the preferred method of engagement. In agreement, respondent 22 stated that the infrastructure did not work quickly enough nor was digitally enabled to provide opportunities to engage with candidates. Respondents 25 and 32 described the system as not user friendly. Respondents 27 and 28 drew attention to the limitations of the system by pointing out that it was old and timed out when mass communication or engagement needed to happen via the system.

The system's inability to function effectively as a tool for engagement indicates a glaring gap in recruiters' ability to manage communication with their candidates. While the use of artificially intelligent recruitment systems is one of the most innovative ways in which leading organisations are streamlining their recruitment process, the full complement of respondents indicated that they were not aware of any artificial intelligence being used in the human capital sphere within the organisation. Artificial intelligence and automation are certainly being used elsewhere in the business, where Respondent 1 reported great work going on. Segments such as the operations business or the digital and data business have implemented some form of automation or artificial intelligence. Respondents 3 and 15 confirmed that they were aware of this, while respondents 8 and 31 noted that the oracle I-recruit system used no form of artificial intelligence. Respondents are however hopeful that when the promised new human capital Workday system is deployed in the organisation, the system and talent acquisition module will include some sort of artificial intelligence.

Next, in order to successfully recruit within the 4IR, HR practitioners must be equipped with the relevant skill sets to do so. Questions 9 and 10 mentioned the skills, abilities, aptitudes of the attraction and recruitment practitioners within the business units. The data indicates that there are two types of training being offered to HR practitioners, (a) LinkedIn and (b) internal/ on the job training.

The 12 respondents who mentioned LinkedIn referred to upskilling, learning and training being offered to HR practitioners. The platform upskilling or training would include how to use the tool as a means of attracting candidates. Respondent 26 indicated that the training for LinkedIn as an attraction tool had been extended to recruiting line managers within the business.

A further 16 respondents referenced internal or on-the-job training. Respondents 3 and 24 referred to this as the standard kind of internal training. Respondents 15, 19, 20 and 29 explained that such internal training was generally aimed at helping HR practitioners to understand only the internal organisational processes, procedures and governances.

On the other hand, most respondents mentioned the type of training *not* offered. Respondent 14 indicated that: *they keep referring to this 'new ways of work', yet the team hasn't been upskilled in how to recruit in that new world.* Respondent 27 echoed this sentiment, saying: *I don't think there is enough emphasis on the whole new ways of work though.* Respondents pointed out that HR practitioners were not given opportunities to attend external training events. According to respondent 13: *We always hear other people in industry are doing cutting edge stuff but our team doesn't get the first-hand experience or training of how it's done*;

respondent 26: *I do believe the team can benefit more from more external training though*; respondent 23: *We haven't had any new training on how competitors are doing it*; and respondent 32: *It hasn't been the new stuff in the market, everything is still aligned to the very traditional approach to recruitment.* The external training or networking events referred to would have introduced the HR practitioners to new ways of attracting and recruiting scarce-skilled talent, to how the market is innovatively enticing passive candidates with sought-after skills to engage with their organisation. The lack of opportunity to attend such events clearly disadvantaged the HR practitioners.

To summarise, LinkedIn training is prevalent within the organisation. HR practitioners can use this as a proactive attraction and sourcing tool. On-the-job training is also a standard protocol to ensure that staff understand the processes and regulations pertaining to advertisements, recruitment and appointments within the business units. However, the organisation does not appear to have made a significant investment in training and upskilling for how to attract and recruit talent in the new digitalised world of work.

Regarding question 10, four gaps or discrepancies were identified by respondents: (1) lack of organisational context for new world of work talent acquisition, (2) lack of innovative training and upskilling, (3) incorrect work allocation and capacity and (4) misalignment of roles and responsibilities between a talent acquisition specialist and the standard recruiter role. First, respondents who did not believe the current attraction and recruitment practitioners had the relevant skill set made reference to a lack of appropriate organisational context. Respondent 2 explained that the organisation had failed to provide the current talent acquisition teams with the organisational context for them to understand the required shift in mindset and skill set. The mandate given to the talent acquisition teams was to advertise a role and place a person in it. The organisation had thus failed to make provision for the new-age recruiter role of brand marketer with an ability to engage with talent networks. Concurring, respondent 6 commented: *I think what is lacking is the change management of the teams actually understanding where the organisation is heading with talent management. There hasn't been clear direction around what the new world looks like for us….* Respondent 18 characterised the problem as a lack of business context. The business had not identified what the relevant critical skills were nor informed the team about the urgency of recruiting for those skills. Respondent 33 confirmed that the recruiters had not been given a mandate to attempt proactive sourcing. There had been no conversation about the expectation that they would play the role of a recruitment agency as well.

The second emergent theme was the lack of training and upskilling provided for the current talent acquisition teams. Respondents who ambivalently indicated both yes and no as to

whether the current attraction and recruitment practitioners had the relevant skill sets to recruit for scarce skills cited a lack of training as the problem. The following comments are indicative that the organisation had made an inadequate investment in training and upskilling to equip the current talent acquisition teams with the necessary knowledge, skills and competence to operate successfully within the new world of work.

Respondent 1: *The team hasn't even got the training required to gain the new type of skills to recruit in this day and age….*

Respondent 3: *We don't get the training on the new tools or the training about how to think differently.*

Respondent 4: *I think as a company we could be doing more to upskill the current employees. Things like networking events and conferences isn't opportunities or training that's provided.*

Respondent 11: *I think that they could benefit from going on further training to help them move with the times. So there's a lot of new recruitment methods out the there. It's by no fault of them that are not getting exposure to it.*

Respondent 14: *I think they can benefit from training.*

Respondent 15: *… there is definitely more development required.*

Respondent 18: *I also don't think they have received the relevant training to be able to offer this service to the business, so I think it's unfair to say they are not competent when we haven't outlined the change we expect to see as business.*

Respondent 26: *Also, I think there is definitely an opportunity to upskill.*

Respondent 28: *It might be because we haven't got formal training.*

What emerges from the above is that the organisation's strategy to become digitally enabled requires a talent acquisition team that is able to recruit the most sought-after skills in the market. Alas, the organisation has not invested in the appropriate training or competency build to ensure that the current complement of HR practitioners have the necessary skills and competencies.

A third theme to emerge concerned a discrepancy between capacity and work allocation within the talent acquisition team. Respondent 7 claimed that because of the high volumes of recruitment the team was unable to hunt proactively for scarce-skilled talent. Respondents 8, 9,10 and 16 were in agreement, asserting that capacity constraints had hindered the team from proactive talent attraction and recruitment. The sheer quantity of standard or traditional recruitment requests had prevented the devotion of time to proactively procuring much-needed scarce or critical skills. The respondents indicated that the number of recruiters allocated per team is less than it was a few years ago, yet the business's expectation of results is much higher.

Another cognate aspect highlighted was the dual role of the recruiter. Respondents 7, 9, 32 and 33 argued that the role of a standard recruiter and talent acquisition specialist differed, and yet the organisation's expectation was that one individual could fulfil both roles. The organisation expected one individual both proactively to engage the market to entice passive candidates to join the organisation and simultaneously to manage a portfolio of standard recruitment and placement roles.

In summary, there is a huge discrepancy between the organisation's expectation of their current HR practitioners' skills and abilities and the actual training, upskilling, support and competency build that has been invested to transition them into the new world of work.

Finally, in question 11, the respondents were asked what they believed the organisation could adapt or change to better attract and recruit scarce-skilled employees. Their responses were sorted into three key aspects, (1) Process improvements, (2) System improvements and (3) People improvements.

Practical suggestions for improving the attraction, recruitment and onboarding process included the following:

Process improvements
- The brand needs to be refreshed to become more conspicuous in the market
- The brand needs to reposition as an employer of choice and create a stronger employee value proposition
- The brand needs to showcase innovative digital offerings available with the organisation
- A more emphatic presence is required on social media such as Facebook, Instagram and Twitter. Although these exist, the content needs to be refreshed and targeted at attracting talent in the market
- Thorough market research is required into what scarce skills are relevant to the organisation and its strategy. This then needs to be communicated across the organisation
- The onboarding experience needs to be improved, irrespective of seniority or role size within the organisation
- Showcase a transformed organisation. Create broader visibility around top talent employment equity appointments.

System improvements
Practical suggestions made were as follows:

- The organisation has committed to launching a new human capital system called Workday. However, this has been postponed because of a lack of IT readiness. This system will be crucial to improving the overall attraction and recruitment process
- The talent acquisition teams require non-restricted access to platforms such as Zoom, Skype and Whatsapp to improve candidate engagement throughout the attraction, recruitment and onboarding phases
- A refreshed approach to IT infrastructure that will enable and support secure engagement with candidates around private and confidential information
- A stronger presence on online social media platforms.

People improvements

These included recommendations regarding improving the skill sets, capabilities and competencies of those who facilitate the attraction, recruitment and onboarding process.
The following practical suggestions were made:

- Investment in specialised training to attract and recruit within the new world of work
- Allowing for direct business engagement with the talent acquisition teams so that they can understand the business context and recruitment needs
- Investing in conferences and networking events for the talent acquisition team
- Creating a network within the financial services industry
- Allocating a professional coach to train employees for the new world of work and future-fit skills.

These are the key desiderata in the current attraction, recruitment and onboarding practices. The discussion next moves to the responses to questions in sub-section C, centred on learning, training and development.

5.2.3 Section C: Learning, training and development

The first question in section C asked respondents to explain how learning, training and development needs were identified in the organisation. Their answers identified a common pattern.

1. Business needs arise

A significant majority of respondents indicate that learning, training and development arise from a business need. This business need may vary according to the segment concerned and the nature of the business, as set out below.

- Product or service requirement

In an organisation largely focused on selling various insurance and financial products, having a workforce that is capable and confident of their product and service offerings is vital to

success. Ensuring that staff receive the appropriate product or service training is critical to the organisation and therefore mandates learning, training and development initiatives. Respondent 4 indicated that the learning centre would be approached with a request for training based on a specific product the organisation was or would be selling. Respondents 7 and 9 confirmed that training is typically related to a specific product. Respondent 28 mentioned more general training in sales: even though candidates might join the organisation with considerable experience, all of them were required to undergo classroom-based training to familiarise themselves with the organisation's products and services.

- System requirement

In a financial services organisation, there are multiple policy administration systems for the end-to-end administration of the insurance business process. Enabling employees to navigate these systems to generate business for the organisation is a large driver for training, learning and development. Respondents 18, 7 and 9 mentioned that the implementation of a new system produced a development need and was a significant driver for training. Respondent 6 cited the example of the Bizagi system, noting that since the apposite skill set was hard to recruit for, the recruiter, human capital business partner and learning consultant collaborated on an internal development initiative. This served to build functional capacity among current staff.

- Legislative requirement

The organisation is a financial service provider and therefore governed by legislation. There are compulsory regulations the organisation and its workforce must comply with. As a result, meeting legislative requirements is a key driver for training, learning and development within the organisation. Respondent 28 claimed that: *In the sales business, there is also a lot of legislative training that is required. The learning team focuses on what is required from a legislation perspective…*. Respondents 15 and 22 also indicated that the need for training might arise from a legislative requirement in the industry or segment. Respondent 31 described training in the relevant legislation as standard within their business unit.

- Performance requirement

The feedback from respondents indicated that a major driver for learning, training or development is a performance or role requirement. According to respondent 23, *They all need to earn their CPD (continuous professional development) points. So, their continuous development from a professions perspective is a huge part of all the development set out for them….* Learning, training and development needs are thus identified via the performance standard required for a professional role. Respondent 19 reported that key training initiatives were implemented to address sales performance, while respondents 22 and 25 explained that a needs analysis was conducted before the training team worked out what had to be done to

improve performance. The need for the workforce to be equipped with the relevant skill sets and system knowledge was thus a key driver for training.

- Change requirement

In a constantly changing world, an organisation is obligated to change to stay relevant and ahead of its competitors. This may necessitate a change in products, processes or the way of working. The feedback from respondents indicated that business change was a significant driver for training, learning and development. Respondent 32 observed that learning or training was identified when there had been a big change in the business that required staff upskilling or knowledge build. According to respondent 33, the many changes within their business unit had resulted in a skills audit. The purpose of the audit was to identify gaps between the current skill set of the workforce and what was now required of them, gaps that needed to be addressed by training or development.

2. Business, HC and learning engagement

Once the training need had been identified, the business would engage with the relevant human capital business partner and the internal learning and development teams to establish suitable learning or development initiatives. This could happen in various ways, both proactive and reactive. Respondents 19 and 20 reported a proactive type of engagement. Respondent 19 noted that the HCBP engaged with the area heads and provincial managers and decided, what training initiatives – based on the needs of the business – should be rolled out to the teams. Similarly, respondent 20 observed that consultation occurred between business and HC. The learning partners would partner with the business either to determine the root cause of the training need or to offer assistance in deciding on a learning initiative. Respondent 22 added that learning consultants were also responsible for assessing whether the business objective and learning objective had been met after a learning initiative had been delivered.

Respondent 17 described a more reactive approach to identifying the learning needs. According to this respondent, the business tells the learning team what the need is and they in turn offer potential learning interventions. Respondent 27 confirmed that the role of leading player in the engagement process varied: in some areas, it would be the learning consultant, while in other areas it would be the performance consultant.

It becomes evident that whether proactive or reactive, there was a concrete level of engagement and collaboration between business and human capital when it came to identifying learning needs and finding suitable initiatives or programmes to address them.

3. Training offered internally or externally

The liaison between business, human capital and learning allows for the team collaboratively to identify what learning delivery method and vendor would be most appropriate to address the relevant business need. According to respondent 6, the team decides if they are able to source and train for the requisite skill internally or externally. The respondent referred to this as deciding what types of skills the organisation would buy, borrow or build. It became apparent that the organisation used both internal expertise and external vendors to supply the most appropriate training to meet the business need.

A notable trend was that 3 respondents mentioned training and development for those with scarce skills. Respondent 33 acknowledged that the segment would need to identify future-fit skills and would do so by working with the central HR team to identify both the skills and the training that would be required. Respondent 23 made reference to the agile skill set and committed her segment to leading a learning initiative from which all the leaders could benefit. Respondent 11 concurred that the business unit would focus on what could be classified as newly-identified scarce skills in which they would want to invest.

No obvious gap or discrepancy was evident in the manner in which learning, training and development needs are identified within the organisation.

Next, respondents were asked what type of vendors were most often used to deliver learning training and development initiatives. There were four options listed, as per below:

- Internal training and development department
- External technical service providers
- Informal internal learning/ coaching & mentoring
- External tertiary/ technical institutions

Notable about answers to this question was that many of the respondents referred to more than one type of vendor being used. It is therefore important to understand what the relevant vendors are being used for within the organisation.

- Internal training and development department

The majority of respondents, 29 out of a total of 34 respondents, mentioned the internal training and development teams being used within their business units. Most business units seemed to have a strong preference for using the internal teams for product, service and process training and development. Respondents 4, 7, 12 and 13 indicated that the internal T&D team were usually used for product knowledge and system training. Respondent 20 referred to this type of training as business-as-usual training, whilst respondents 21 and 28 called it technical segment-related training. Respondent 18 noted that the internal learning and development teams were considered experts in learning material pertaining to the organisation's processes

and systems and were therefore predominantly used to upskill staff on these. Respondent 31, technical and legislative training to the fields covered by the internal learning team.

- External technical service providers

The feedback from respondents indicated that external technical service providers were often used for technical, role-specific training (respondents 1, 2 and 15). According to respondent 16, external service providers were often used for skills that are considered scarce. Respondent 17 confirmed that when specialised learning was required, the HCBP or learning consultant would source a service provider to provide it. Respondent 30 agreed, observing that service providers were definitely used for more advanced or specialist skill set training.

Respondents 1 and 2 mentioned Deloitte, EOH and Torque IT as among the service providers used. These service providers were often used because they could provide certification and accreditation for the courses that the staff complete (respondent 12). This was confirmed by respondents 15, 19 and 24, who noted that management courses such as GIBs require accreditation and therefore external service providers are used. Respondent 13 added that service providers were used for learning new to the market, such as agile training.

A prominent trend in the feedback was that HCBPs and learning partners would work in conjunction with the business to find a suitable external provider. This ensured that the supplier meets all the required due diligence from an organisational perspective and is indeed the most suitable to meet the business's needs.

- Informal internal learning/ coaching and mentoring

This aspect is not often referred to in the respondents' feedback. Respondent 13 mentioned the segment's using what's known as an SME (Subject Matter Expert). These individuals are often known in the business for having years of experience and knowledge of a system, process or product. The role is an informal one but often used to transfer knowledge or develop staff within the segments. In the customer services business – often in the call centre and back-office environments – a skills coach is used to ensure that employees can gain quick access to information or system navigation to assist a client. Although this method was not remarked on many times in the respondents' answers, it often occurs within the organisation, especially in the sales or customer service segments.

- External tertiary/ technical institutions

Tertiary or technical institutions are also often used for accredited learning. Their programmes often involve structured learning that leads to formal accreditation in line with external market requirements.

Respondent 2 referred to FTI, an acronym for Faculty Training Institute. According to its website, FTI is a private training company that offers career-orientated qualifications. These include short courses in line with technological and business requirements and relevant to employees of the future. There was agreement among respondents 7, 10, 11 that external institutions were often used for more focused learning. While using external institutions is necessary, it is not always the best solution as the intellectual property involved does not belong to the organisation (respondent 21). Respondents 24, 29, 30 and 31 reiterated that, as was the case with external technical service providers, the option to use external tertiary or technical institutions is mainly exercised so that employees can obtain externally accredited and recognised formal learning.

A huge gap identified above lies in the use of the internal training and development teams in an organisation this large, operating in a rapidly changing environment. It is crucial for the internal learning and development teams to be able to offer skills that are associated with the 4IR. Currently, these teams are used predominately for internal product- and service-related training. Whilst the researcher acknowledges this is vital to the success of the organisation, the question arises as to whether this is enough. The internal training and development teams should possess the skills and capacity to shift the organisation towards an evolving digital culture. They are supposed to be geared to modify how the organisation operates by delivering on human skills development in line with a digitally enabled organisation. Yet at present, the organisation relies heavily on external service providers and external technical institutions to provide most technical advancement training. Comments made by respondents 2, 13, 18, 21 and 26 suggest that the internal T&D teams are not equipped to offer very innovative training options.

Respondent 2 indicated that her segment rarely went to the internal T&D team for technical courses because they lacked the expertise (respondent 13). Respondent 18 agreed that the internal L&D teams did not yet have the capacity to train in scarce skills. These teams would require a substantial investment of time and training to be able to offer this type of training to the segments. Respondents 21 and 26 confirmed that the internal L&D team tended not to be approached because it was recognised that they did not have the internal capability to offer the most innovative training.

The above indicates a substantial discrepancy in the way in which vendors are used within the organisation.

- Budget or funding for training and development

The next question was concerned with whether business units were allocated the necessary budget or funding to avail themselves of opportunities for learning, training or development. A total of 27 respondents answered yes to this question. Respondents 5, 7, 13, 14, 15, 17, 18,

19, 20, 30, 31 and 32 indicated that the funding was available since it was a crucial element in the previous year's business planning. Business planning activities would include the allocation of funds to various aspects of managing the segment's budget. These aspects would include head count management, recruitment costs, software license management and staff training and development. At this point, the business would allocate an amount of money to invest in staff training and development. Respondent 31 noted that the segment would identify its critical learning needs and allocate a budget accordingly. This allocation is signed off by the executives in the segment (respondent 19).

The respondents who had answered affirmatively stated that the internal T& D teams worked on what is known as a fixed-funded system. This meant that a segment would pay for dedicated learning resources. These resources would still form part of the central learning team but deliver learning initiatives into the business. Respondent 13 observed that the business gave the fixed funding and the learning team then supplied learning services equal to that funding. The availability of such funding had a positive impact on the business. Respondent 1 indicated that the organisation had a great employee value proposition and the investment in training was a part of this. Concurring, respondent 6 claimed that the organisation had a culture of wanting to train and develop, so they would usually find the funding if the training was to the advantage of the business. Respondent 8 agreed, observing that the organisation makes the budget available for employees to attend courses so they don't lag behind industry standards. It became evident that the majority of respondents agreed that the organisation was making the necessary investment in the training and development of staff.

On the other hand, respondents who answered no provided various reasons for their answer. First, respondents 21 and 34 indicated that a learning budget was not always available since learning was viewed as an extra cost, and if any cost cutting was done, the learning budget would be downsized or removed. Respondent 27 suggested that line managers might lack an understanding of how to plan, budget and execute learning initiatives. Four other respondents indicated that sometimes a learning budget was available and sometimes not. Respondents 9 and 20 claimed that funds were often not available for external learning. Respondent 29 suggested that the sales division placed a higher priority on sales, while respondent 11 felt that budget availability was dependent on how a manager viewed training and development.

In closing, the vast majority of respondents agreed that sufficient funding and budget allocation for training and development was indeed available across the different segments. Budget allocation for learning, training and development was therefore not identified as a discrepancy.

Subsequently, respondents were asked to share their opinions on whether the internal training and development teams were equipped to train and develop for newly-identified scarce skills. An overwhelming majority of respondents answered the question in the negative. Two themes emerged as to why respondents answered no to the question: (1) lack of training for the internal T&D teams and (2) the lengthy tenure of internal T&D teams. The two themes are explored below.

- Lack of training for the internal T&D teams

Respondent 12, a learning and development practitioner, argued that the organisation had not offered the internal T&D teams upskilling on how to move to a digitized learning offering and the team was left to struggle on in this direction on its own. The respondent maintained that the cost of additional learning was borne by the individuals and not the organisation. Respondent 20 observed that the internal L&D teams required upskilling and formal training, but capacity was an obstacle: the teams were inundated with business requests and therefore rarely had time for training and development for themselves. Respondent 21 agreed with this, adding that there was insufficient focus in the organisation on the HR professionals getting upskilled or refreshing their skill sets. According to respondent 22, the L&D teams also required exposure to the market to see what were considered scarce skills and how to train for them. In addition to the relevant training, the teams also require a shift in their mindset (respondent 34).

- Lengthy tenure of internal T & D teams

Respondent 17 drew attention to the lengthy tenure of the L&D team members. Many of the team members had been with the organisation for 15–20 years and were regarded as baby boomers. It was generally more difficult for those individuals to adapt to a digitised environment and keep up with the rapid pace at which the organisation was evolving. Respondent 33 concurred, noting that members who had been in the learning space for a really long time struggled with the shift to the new world of work. According to respondent 4, the learning teams had been in their roles for such a long time that they lacked the forward-thinking skills to train for newly-identified skills.

In contrast, 8 respondents believed the current L&D teams were equipped to train for newly-identified scarce skills. Respondent 1 claimed that the internal L&D teams were on board with the new ways of work and were driving them as much as they possibly could. Respondent 18 agreed, noting that the learning teams were on a journey of change and had implemented a new model to enable them to succeed in the new world of work. Respondent 32 affirmed that the internal learning and development teams consisted of strong resources that were constantly upskilling, benchmarking and putting out feelers to find out what was new and

relevant. The remaining respondents indicated that they too believed the internal L&D teams were capable and competent.

Irrespective of whether they answered yes or no to the above question, the respondents believed that the internal L&D teams were exceptionally prepared and skilled to administer product-, system- and process-related training. Respondent 2 said: *the team is really geared up to train the customer service business based on new products or services*, while respondent 5 agreed that: *for the operation like service business, yes, they are able to train and upskill.* According to respondent 19, *Well the team really is just used for the internal technical training. That the team does a really good job at that*, and respondent 28 similarly remarked*: So our team is definitely competent to train for those technical role related skills, the things that have always been required.* Respondent 29 confirmed that: *the team can offer the core technical training.*

The above indicates a sense of confidence in the internal L&D team's ability to offer core role-related training, whether based on product, system or process. On the other hand, there seemed to be consensus that the internal L&D teams were not ready to train for the new world of work skill sets. Respondent 9: *I don't think from a cutting edge perspective, that they are really equipped for that. Usually for a lot of the cutting edge stuff, the innovative stuff. We would generally look for external vendors to provide that sort of training*; respondent 13: *If you referring to something technical like Agile or DevOps, then no. We certainly don't have that type of technical knowledge in order to train for those skills…*; respondent 16: *" In the D&D space, it is specialist and has niche skills and I don't believe they have been equipped to train for those skills…*; respondent 19: *For the new scarce-skill training, we still go outside, and I don't foresee that changing*; respondent 29: *I don't believe nor have I witnessed them being ready to offer the business the training for the newest skills out there*; respondent 34: *I definitely anticipate it is going to a bit of a push before we get them to shift to the new ways of work and be able to train for those scarce skills.*

There is thus definitely concern about the internal L&D teams not being ready to train for the scarce skills within the market. The business continues to source external vendors such as service providers or technical institutions to offer scarce skills training.

Finally, respondents were asked what they believe the organisation could introduce or acquire to train and develop for newly-identified scarce skills. In the responses, three key themes emerged: (1) Process improvements, (2) System improvements and (3) People improvements.

Process improvements

Practical suggestions and recommendations for improving the learning, training and development process included the following:

- Partner with external technical vendors to transfer knowledge to the internal L&D teams to identify and train for specialised learning paths.

- Allow for flexibility and personalisation in the learning of members. Ensure that learning is relevant and applicable to the role and current or future team.

- Identify and communicate with the organisation regarding scarce and critical skills. Then use current workforce and offer upskilling and training to build internal capability.

- Drive a culture that embraces learning. Ensure that a fail-safe environment is created in which staff can use their failures and setbacks as stepping stones toward creating new and innovative processes or systems.

- Leverage off service providers, ensure that knowledge transfer is a part of the agreement so that when a service provider is used they transfer the skill or intellectual property to someone in the internal L&D teams.

- Create a partnership with SMEs in the market, whose Subject Matter experts can transfer knowledge relevant to the market.

- Invest in a learning environment that fosters a culture of learning and development innovation, e.g. a play pen for the most critical skills in the market.

System improvements

- Invest in a new learning management system. The organisation has committed to implementing the Workday system. This needs to be deployed across the organisation so that the learning teams can see what efficiencies the system brings about.

- The learning management system should enable automated training recording and processing.

- Enable the learning delegates with flexible access to the infrastructure that supports online learning. This ensures that individuals who want to train or develop a scarce skill can do so in their own time and place, and at their own pace.

People improvements

- Offer agile training to the internal L&D teams so that they can become familiar with the methodology and how to apply it within a learning environment.

- Offer immersions to the current L&D teams in leading organisations that have fully digitised online offerings. This will provide insight into the tools used to offer digital learning, and into how teams are structured to offer digital learning for scarce skills.

- Invest in conferences, networking events and formal learning for the internal L&D teams to equip them to operate in the new world of work.

- Review the structure and design of internal L&D teams. Consider having standard traditional technical role-related training facilitators. Subsequently, invest in learning

facilitators who can operate in the new world of work and focus on training for scarce and critical skills across the segment or organisation.

These are the key discrepancies within the current learning, training and development practices. We turn next to discrepancies identified in sub-section D, which centred on retention.

5.2.4 Section D: Retention

In order to explore the organisation's retention strategies and their efficiency, the respondents were asked why talented employees or those with scarce skills leave. The question drew a variety of answers, which are discussed below.

- Lack of growth and promotional opportunities

Fifteen respondents mentioned a lack of growth and promotional opportunities as a reason that talented and scarce-skilled employees left the organisation. Respondents 5, 7 9 and 20 indicated that it took too long for talented individuals to progress within the organisation. In agreement, respondent 6 pointed to a lack of growth at a higher level, which might indicate that scarce-skilled employees craved a more strategic role but did not receive the appropriate opportunity internally. Respondents 15 and 22 agreed that such employees might view themselves as ready for the next stage, but in the absence of an internal opportunity, they start looking externally. Respondent 17 added that a lack of clear direction frustrated these scarce skilled employees and prompted them to seek it elsewhere.

- Relationship with supervisor/ management

A total of 14 respondents indicated that talented or scarce skilled individuals left because of poor relationships with their direct supervisor or management. There were various reasons for this. According to respondent 4, the organisation appointed technical specialists who lack basic leadership skills and thereby create an unbearable working environment for some individuals. Respondent 9 agreed, stating that scarce-skilled employees left because they were not happy with their manager, sensing unfair treatment or favouritism in the team.

Another aspect raised is that often very talented individuals refuse to work in an environment in which there is mutual disregard or disrespect. Respondent 17 indicated that these individuals would much rather leave than operate in an environment where they did not respect the management or leader. Respondents 28 and 29 made reference to the lack of good leadership specifically in the sales environment. The business had lost talented individuals because managers were unable to manage the millennial workforce, only driving sales and lacking the basic principles of people management.

- Lack of career pathing

The feedback about this aspect was very similar to that of the absence of growth and promotional opportunities. Very scarce-skilled individuals require a set path, with milestones and timelines in order to progress. This is apparently not available currently.

- Poor implementation of performance management

No respondents made any direct comment about the poor implementation of performance management being a reason for talented or scarce skilled individuals leaving.

- Lack of challenging work or rotational opportunities

Respondent 4 asserted that scarce-skilled employees required more challenging work, and this might require getting the opportunity to operate at the next level to stretch the individual. When this is lacking, it can lead to the organisation losing these individuals. Respondent 15 added that the organisation took too long to offer rotation opportunities since those with scarce skills seemed disinclined to stay in one role or space for too long. According to respondent 25, the organisation was at fault for creating such a huge dependency on the scarce-skilled individual that when they asked to rotate or do something new and exciting, they get denied this opportunity on the grounds of the business risk entailed. As respondent 30 pointed out, the organisation risks losing these individuals because they then become bored in their roles and seek more challenging work from external competitors.

- Misalignment between organisational and personal goals and vision

Several respondents pointed to the misalignment of organisational and personal goals. The respondents referred to this as a culture misfit. For instance, respondent 3 suggested that individuals might leave due to a misalignment between where the organisation is heading and where they were within their own lives. For instance, long-tenured employees had indicated that the organisation had undergone significant change in the previous two years, which had imposed great stress on them (respondent 11). Such employees claimed that a family culture and culture of friendliness no longer existed within the organisation. Similarly, respondent 13 claimed that talented employees exited because they felt that they were not aligned with the values of the organisation any longer. Or, new recruits with talent felt personally at odds with what they perceived to be the organisation's values. The organisation was too conservative and slow: they wanted to move on because their innovative thinking was ignored by management's insistence that things continue to be fitted into the same organisational mould. In support of this opinion, respondent 24 suggested that scarce-skilled employees left due to a misalignment of organisational and personal vision. The organisation is always looking for cost effectiveness. Yet people with really scarce skills wanted to try new things and that cost money and required leadership buy-in. When this didn't happen, they became despondent and departed. Concurring, respondent 30 noted that scarce-skilled employees were appointed

because they came with a different way of doing things. They're good at what they do, but they keep getting shunted or told to stay in their lane and not change things up. This eventually frustrates these individuals and they leave.

- Compensation & Benefits

Respondent 1 was of the opinion that money was definitely a reason scarce-skilled or talented employees were lost. Developers, for instance, were a scarce resource with skills highly valued in the market and that was always a reason that the organisation might lose this type of resources. Respondents 6, 8, 9 and 14 were in agreement. Respondents 6 and 23 explained that because a scarce skill was in such high demand in the market, the organisation would always be at risk of losing that individual to a more lucrative offer. Respondents 10 and 11 added that when individuals were made an external offer, the organisation was not always in a position to counter-offer owing to the size of the package offered. Another push factor for scarce and critically-skilled employees is the discrepancy between the payment for service providers and permanent scarce-skilled individuals (respondent 2). Respondent 4 pointed out that the benefit options at the organisation were steep and resulted in employees' receiving a lower nett salary, which they found frustrating. Respondent 20 pointed out that the organisation offered no tangible or lucrative benefits specifically to scarce-skilled employees.

Next, the interview guide explored the role of intrinsic versus extrinsic factors in retaining key scarce-skilled and talented employees. The most commonly cited extrinsic motivation factor is money. Hajduk (2017) claims that tangible rewards such as salary and bonuses are often used to reward employees for making a meaningful contribution to the organisation and thus used as a retention mechanism.

In line with the above, the respondents were questioned about how attractive employees found the total guaranteed package at the organisation. A total of 15 respondents believed that employees found the total guaranteed package attractive. Respondents 13, 18 and 24 remarked that the organisation paid a good salary, on a par with the market. Respondent 23 agreed that the salaries were competitive, while respondents 2 and 17 made reference to the stability of the brand and the organisation's being able to offer longevity and disciplined savings schemes to employees.

Respondent 28 mentioned the sales environment, explaining that the organisation remunerates differently from its main competitors. The sales staff do not only receive commission for sales made, but also a basic salary. Moreover, sales staff do not lose commission earned if a customer is unable to make payment on a policy. This ensures that the sales staff are not penalised and their commission is not negatively impacted. Additionally, sales staff are remunerated 6 to 12 months later should they offer sound financial advice and

the policy holder continues payment. Even among those who answered yes to the question, there were some who felt there was room for improvement, in either the TGP offering or the benefits associated with the package.

On the other hand, a total of 19 respondents answered the question in the negative. This response was due in large part to the allegedly unattractive benefits offered by the organisation. Respondent 1 indicated that employees were often disappointed by the inflexibility of the benefits offering. Respondents, 2, 6, 7 and 19 referred to the medical aid options as unattractive, with respondent 2 arguing that employees did not like it that the organisation's medical aid option was the only one available. Respondent 7 agreed that medical aid options needed to be more flexible to suit the employee's needs. Respondents 6 and 19 had reservations about the cost of the medical aid, which significantly impacted the nett salaries of employees, creating an unfavourable response to the TGP offering generally.

In contrast to those respondents who indicated that the organisation offered competitive salaries, respondent 4 commented: *If I'm to compare it to its competitors, we're not actually the best. We offer really standard benefits for such a huge company*; while respondent 8 used the words: *not really attractive in terms of the salaries and comparison to the market*; and respondent 11: s*o from a package perspective, we are not really offering people something that is truly competitive*. Respondents also made the point that the package was complex and difficult to understand. Human capital teams needed to engage more with staff to help them understand the full offering.

The respondents also pointed out that the organisation lacked flexible benefits like work from home, flexible working hours or tangible, product-related benefits. The absence of tangible benefits such as prime employee rates on products, subsidies or co-payments of policies meant that the organisation had to compensate with higher-than-average monetary rewards. While views were thus divided on how employees view the TGP offering, what was apparent was that the organisation does not offer what employees view as lucrative benefits within the new world of work.

In contrast to the above, questions 3 and 4 make reference to intrinsic factors. Hajduk (2017) states that although extrinsic rewards have dominated reward and retention mechanisms for years, there has now been a cultural shift. Extrinsic factors alone are no longer enough to reward or retain employees. New-age employees expect the organisation to make them feel valued and personally aligned with the organisation's purpose and vision. Hajduk (2017) maintains that new-age employees are more likely to be retained if they are inspired and engaged by the organisation at which they work.

Question 3 questioned the respondents about workforce engagement. Three themes emerged, signalled by those who responded with a definite yes, those with a definite no and (most commonly) those who thought that some members of the workforce were engaged and passionate and that some were not. Respondents who proffered a definite yes attributed their answer to two factors, (a) the organisation's reputation and (b) the individual employee's passion for their work. Respondent 2 indicated that employees were passionate about working for the organisation because the brand attracts strong loyalties. Respondent 5 agreed that employees were engaged and committed to the organisation as whole because of its culture. Employees display a sense of pride and passion about their being a part of the organisation (respondent 11). Respondents 21 and 32 added that employees stayed with the organisation for a long time because the organisation is a good company to work for, with a really good culture.

Other respondents remarked that employees were passionate about their work and committed to the organisation's success (respondents 6 and 20). Respondent 33 agreed that even though there were challenges and changes within the organisation, employees were still focused on achieving the objectives of their teams and the organisation at large.

The respondents who recorded a definitive no ascribed their view to two factors, (a) the pace of organisational change and (b) management relationships. Respondent 3 claimed that there had been a definitive decline in engagement due to the changes that the organisation was going through, which had resulted in employees feeling a lot of pressure. Changes in the organisation had directly impacted individuals in her team and this had led to uncertainty and a decline in their enthusiasm for working for the organisation (respondents 17 and 31). Of the same opinion, respondent 19 added that the decline in passion might also be the result of changes impacting certain employees' pockets.

A second reason for the definitive no was that of management relationships. Respondent 4 claimed that staff had huge problems with management. They argued that management had changed and they operated in an environment similar to a factory, with a major focus on cost efficiencies and very little regard for staff. Respondent 13 added that the organisation appeared to remove people-orientated leaders and appoint more task drivers. Employees became disengaged as their personal development was often set aside to meet targets.

A majority of respondents indicated that some of the staff were highly engaged and passionate about working for the organisation, while others were not. The responses were variable dependant, in that factors such as leadership, age or specific business unit determined how

engaged and passionate employees were. Respondents 1 and 9 noted that *pockets are different,* while respondent 15 observed that *some people are energised and others not.* Respondents 8, 14 and 23 all referenced the particular area or business unit as a variable that could determine whether or not an employee was energised about their work. If the employee was based in an area where exciting work was being done, they were likely to be more engaged.

Respondents 7, 12 and 24 cited age as a variable but offered different opinions about the generational impact on engagement and passion. Respondent 7 argue that the older generation was more engaged than younger generations like millennials and Gen Zs. The older generation was more appreciative and capable of sustained effort, while younger people wanted to complete tasks and be rewarded quickly. An opposing view was presented by respondent 12, who claimed that the youngsters coming in were passionate and wanted to do new things. Employees who had been working at the organisation for 20 or 30 years were no longer capable of such excitement. Respondent 24 thought that employees who had been with the organisation for 15-plus years were no longer fully engaged since they were unable to keep up with the organisational pace of change.

The third consideration mentioned was dependence on management or leadership. Respondents 4, 5, 10, 14 and 21 suggested that employees' levels of engagement and passion were dependent on the type of leadership or management in the area. Respondent 5 argued that although the organisation was great holistically, when one drilled down to business unit leaders employees' experience could differ greatly. In areas where senior leaders were present and engaged with staff, staff were often more passionate (respondent 10). Staff considered themselves fortunate when they reported to a good leader who was able to motivate and engage with the team (respondent 21).

To conclude, a gap became apparent. The organisation is divided between employees who are passionate and engaged and those who are not. The employee experience is influenced by severable variables that include business unit allocation, management/employee relationships, rate of change within a business unit, age and exposure to challenging and meaningful work. The organisation appears to lack a holistic approach to fostering engaged and passionate employees.

Next, respondents were asked for their opinion about whether employees were experiencing an encouraging work culture? Again, respondents' feedback was split. Employees who affirmed that the work experience was encouraging cited two factors: (a) having an excellent manager and team and (b) completing or participating in meaningful work. Respondent 2 said

that employees experienced a positive culture when the managerial support is amazing and there both is a good understanding with the manager and a good balance in the team. According to respondent 7, the team that people are in and who their leaders were determined how much they loved their working environment. Respondents 9 and 10 agreed that good leaders created an encouraging work culture. A positive team dynamic also impacted an employee's experience (respondents 6 and 30).

Participating in meaningful work also contributes to employees' experiencing an encouraging work culture. Respondent 8 explained that the work employees do was crucial: in areas such as robotics and digital and data, employees are experiencing a great culture because the work they are doing is exciting and it is a high-energy environment. They also have a refreshed way of working which contributes to a good culture. There had been an improvement in engagement according to surveys because these employees enjoyed participating in and showcasing the work they are doing, for instance, to enhance the digital customer experience (respondent 16).

Other respondents indicated that the work culture experienced was not encouraging. They attributed this to (a) bad management practice and (b) increased work pressure. Regarding bad management practice, respondent 2 explained that the environment was discouraging when line managers were absent, disengaged or had unrealistic expectations of employees. Respondents 11, 19, 23 and 26 agreed that an unpleasant culture could result from the management or leadership of a team or area. Respondent 13 thought that this unpleasant culture was engendered by leaders who were more cost- and money-driven and lacked focus on managing people and enhancing their experience. In the sales environment in particular, the evidence of exit interviews revealed that individuals left because of management style (respondent 28). These employees experienced a difficult culture in which they did not receive appropriate support and respect from senior sales leaders. Respondent 22 maintained that top talented individuals would raise their dissatisfaction with management style, and if there was no change, they would exit the organisation.

The second theme that emerged was that an increase in pressure in the work environment had led to employees not experiencing an encouraging work culture. Respondent 13 explained that the increased workload on employees had shifted the culture. Employees were expected to double their workload for the same salary and rewards. incentives such as progression or salary increases are rarely offered to these employees, which leads to a demotivated workforce. Respondent 20 agreed that the workplace was characterised by such a fast pace that employees were required to do more than before and could start to lag behind. This made them unhappy and their work experience became a negative. If employees were unable to

transition to the new world of work, which consisted of a digital and agile environment, they became negative and experienced work as discouraging (respondent 24). Respondent 32 concluded that a high-pressure environment combined with structural changes had resulted in a less than encouraging work culture.

Questions 5 and 6 in the interview guide were asked to draw a comparison between current retention strategies at the organisation and modern strategies identified via the theoretical framework. The purpose was to identify if discrepancies existed. The respondents were first asked what current retention strategies were utilised across the organisation, and in reply they made reference to the following:

- Share allocation

Respondents 1, 2 and 10 cited employees receiving a share allocation. Respondent 1 described this as a long-term incentive strategy, generally offered to more senior employees (respondent 7). Share allocation usually locks in higher role size and more senior employees for a minimum period of three years (respondent 26).

- Secondments/ Rotations

To introduce the concept of secondments and job rotations, respondents 4 and 16 noted that business units had used this as a mechanism to keep employees challenged and therefore as a retention strategy. Respondents 14 and 31 observed that in order to retain talented employees, the firm offered them exposure to leadership roles and training to elevate them to the next level. Respondent 22 adds that the HCBPs would assist with this by looking at what other experience or exposure the organisation could offer to retain the employee.

- Learning and development opportunities

Respondents 7,13, 17, 25 and 31 declared that learning and development opportunities were offered to employees as a retention strategy. Respondents 15, 32 and 21 mentioned a specific development programme named Velocity as targeting the retention of those with scarce skills and building leadership. The objective of the programme was to offer an individualised development track for high-performing employees with a set trajectory for their careers. The hope was that this would induce employees to stay with the organisation.

The organisation and management would first assess the employee's value to the team and then decide if the organisation would invest in retaining the individual (respondent 24). This investment, according to respondent 21, could be a mixture of formal and on-the-job learning and training. High-performing employees were offered mentors and coaches to train and upskill them for the roles they aspire to. This ensures employees want to remain with the organisation. Offering top talent learning opportunities benefitted both the individual and the

organisation, because their retention would continue adding value to the organisation (respondent 33).

- Bonus allocation

Respondents 2, 7 and 9 introduced the strategy of bonus allocation as a retention mechanism. Bonuses were allocated annually (respondents 9 and 32). The performance management system was aligned with the bonus allocation system. Top performers were awarded a higher performance rating, which in turn secured them a more lucrative bonus. This in itself acts as a retention mechanism (respondent 30).

- Counter-offers

Respondents offered conflicting views about counter-offers. Respondent 8 claimed that the counter-offer was not a strategy used at the organisation. Respondent 16 agreed that the business did not counter offer, but looked at alternatives to retain the talented employee. Only very seldom were monetary counter-offers approved (respondents 11 and 24). Respondent 32 observed that the business was cautious of counter offers, as this could mean that money would always be a problem between employer and employee. On the other hand, respondents 1 and 6 indicated that the business would consider monetary counter-offers as a retention mechanism. Respondent 10 said that because actuarial skills were so scarce, the organisation would resort to counter-offers in that instance, as well as for other senior roles (respondent 14). The application of counter-offers as a retention strategy appeared to be inconsistent across the various segments.

- New role /progressions

Respondents 11, 17 and 22 referred to offering a new role or progression to talented employees as a retention mechanism. This would be via either a vacancy process or the career progression process.

- Recognition

Only one respondent made reference to the use of recognition in order to retain employees. Respondent 13 explained that the business units tried to use the recognition programme to retain talented employees, but that it was difficult to embed recognition within the culture.

What is evident from the above is that the organisation has invested in a variety of retention strategies. These strategies have been offered across the organisation for some time, resulting in its being able to retain its traditional talented employees. There appeared to be a feeling that the organisation needs to do more. Respondent 3 was of the view that the organisation was not doing enough, while respondent 7 believed that the retention model required attention and should be a core focus area for the business. According to respondent 28, the organisation was not agile enough and tended to rely on the most basic retention mechanisms such as

benefits and salaries, which were not enough. Respondents 6, 2 and 4 thought that the organisation should avail itself of more nonstandard retention mechanisms. As noted in the literature review, these included 'modern' techniques such as management monitoring, HR retention metrics and transparent communication. Respondents were divided as to whether these were in use and/or whether they were effective.

- Management monitoring

Respondents who indicated that management monitoring was present in their business units confirmed that both HR and management were involved in this. According to respondent 2, management monitoring was applied after a business unit had experienced a high staff turnover. The HR team intervened and surveyed employees around topics such as leadership, rewards, process and structure. A trend analysis allowed for interventions to be developed for the team. Respondent 16 indicated that the HR team would do informal check-ins with staff if they heard of rumblings in the business, and would perform an environmental scan for any roadblocks staff might be experiencing. In agreement, respondent 24 indicated that if a retention rate was low, HCBPs and learning partners sought to determine if there was a leadership problem or lack of skill or will. If so, the learning consultant and HCBP would recommend an intervention. Respondents 12, 25, 29, 30 and 31 referred to HR involvement. The respondents said that when a matter was brought to HR's attention or HR was alerted to a matter regarding leadership style, they acted on the information and investigated the merits of the allegation. If action was warranted, they would involve senior leadership and take appropriate action. Should a matter be raised with the business unit executive, he or she would partner with the relevant HCBP to investigate and intervene if required (respondent 18). Respondents 32 and 33 conclude by asserting that the HR community conducts management monitoring and would involve even executive management if this was required.

Contrarily, several respondents declared that management monitoring was not performed within their business units. Respondents 1, 3, 5 and 6 reported that they had never heard of management monitoring in their business unit. Respondent 10 added that management monitoring was not actively performed, citing an example where there was a high turnover rate due to management style, but there were no consequences for the line manager because she was able to deliver. Respondent 4 recalled a similar experience, stating that staff have complained about the same manager for years, and several had left, yet no action had been taken. Respondent 28 agreed that there were no consequences for managers who were disrespectful or did not do what they needed to do. Management monitoring was not an automatic good because ii could result in employees' operating in a culture of fear: speaking up against bad management practices might lead to victimisation (respondent 8). Respondent 13 concurred that management problems very rarely got addressed, and HR needed to intervene sooner.

- HR retention metrics

As above, this question drew mixed responses from respondents. Those who affirmed that HR retention metrics were used reported a strong reliance on the data gathered from exit interviews (respondents 11, 15, 21 and 29). Respondents 21 and 25 explained that exit interview data was analysed and themed to inform leadership that a retention problem was being experienced and to catalyse an action plan to address the problem proactively. Respondent 28 confirmed that exit trend analysis was used to bring about positive change. According to respondent 5, the business unit made use of a MIS specialist who looked at exit trends and offered recommendations on how the business can address this. Respondent 7 reported that exit trend analysis was used to create a dashboard to highlight problem focus areas for HR to review. Retention interviews were held in an effort to retain top talented employees (respondent 10).

Several respondents indicated that retention metrics were not being used correctly. They attributed this to an inability to simplify and categorise data into useful insights. Respondents 10, 17, 33 and 34 confirmed that although exit interviews were done, the information was not used to generate real data that could serve to influence retention strategies. Concurring, respondent 28 complained that the lack of an analytics specialist in the segment led to its being unable to generate useful data that could actually make a positive difference. Respondent 5's team had a MIS specialist who worked with HR-related data but still could not identify exit trends. Respondents 12,14 and 24 also felt that, in their experience, HR retention metrics had not been used correctly to retain scarce-skilled talent.

- Transparent communication

Some respondents maintained that the organisation communicates transparently, while others did not believe that there was sufficient transparency. Respondent 33 claimed that the organisation communicated transparently by providing sufficient justification and rationale when changes occurred. Respondent 2 mentioned newsletters and IT strategy updates as ways in which the organisation sought to communicate transparently with employees. Respondent 32 noted that the business had invested in a dedicated change and transformation team, which kept employees abreast of upcoming changes and sought the most appropriate medium in which to communicate with staff. The organisation communicated actively and transparently, with direct communication from the CEO (respondent 3); it used emails from the HC division and leadership to communicate changes to provincial employees (respondent 25). Respondent 18 felt that the organisation communicated as transparently as possible, but was deliberately cautious in order to avoid panic or worry among employees. Only agreed facts were transmitted (respondent 23).

In opposition to the above, respondents 9, 10, 14, 15, 30 and 34 argued that the organisation did not use transparent communication to retain staff. The organisation might send an email, but the message provided only the bare minimum in terms of a rationale for change and was therefore not perceived as transparent communication (respondents 29 and 31). Respondents 11, 12, 13 and 21 claimed that the organisation did not transparently share information that impacts staff. Insufficient rationale was provided for business change or was not provided in time. The respondents argued that mixed messages were received from leaders, which resulted in employees feeling uncertain and breached the trust between the employer and the employees. Respondents 13 and 24 echoed this sentiment, stating that although the organisation might try and communicate, they often did not allow the necessary time or support for employees to adapt to the change. Respondents 27 and 28 went so far as to say that the right people were not informed about business change, even when it had a direct impact on them. Respondent 28 emphasised that communication across regions or provinces was even more tenuous. To conclude, it is possible that the level of transparency experienced by employees is dependent on the type of leader they have (respondent 22). If a leader displays transparency in their leadership style, employees will be informed and aware. If not, the employees will experience uncertainty and anxiety around business change.

The variance in the feedback from respondents draws attention to the inconsistent application and experience in the organisation of modern retention techniques. Lastly, respondents were asked what innovative methods the organisation should consider to retain talented and scarce skilled employees? Three key themes emerged from the data, again including:
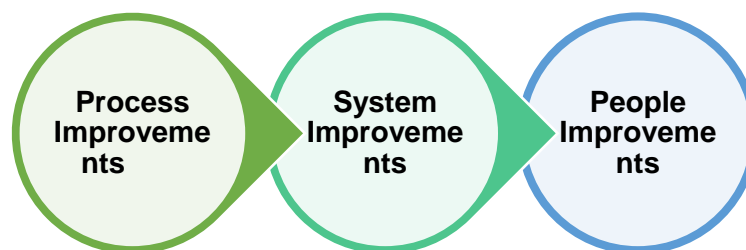
Process improvements

Practical suggestions for improving the retention process included:

- Actively listen to employees' needs and tailor-make retention packages for scarce-skilled employees
- Investigate the root cause(s) for top talent leaving the organisation
- Introduce work-life balance as an organisational standard
- Enhance the culture of recognition for scarce-skilled and top talent employees

- Refreshing the brand and re-branding to be heightened internally and externally to showcase the brand and its achievements
- Offer rewards and recognition for significant projects or achievements. Introduce innovative offerings such as travel incentives for top employees
- Introduce flexible working schedules
- Promote the use of rotations and transfers across the segments and business at large
- Review remuneration and benefit offerings and offer more lucrative packages and enticing benefits
- Upskilling and re-skilling the current staff complement
- Conferences, networking events and training initiatives should be used as a retention mechanism
- Redefine career and role progression paths for employees
- Provide a working environment that fosters creativity and innovation
- Invest in a new performance-management process.

<u>System improvements</u>

Practical suggestions for enabling and improving retention were as follows:

- Invest in a predicative analytics model/system that can provide useful insights and informed decisions concerning retention strategy
- Implement the Workday system which will allow for immediate feedback from employees on line managers. This will serve a management monitoring function
- Invest in a platform or system that enables employees to voice their opinions and thoughts about changes within the organisation.

<u>People improvements</u>

Practical suggestions for improving the skill sets, capabilities and competencies of those who facilitate retention included:

- Equip the HC community with the skills to offer stress management and resistance training
- Enhance the HC community skills to identify bad management/ leadership practices and offer solutions to rectify or improve these.

5.2.5 Section E: Business impact

The interview guide concluded with three questions that solicited the respondents' feedback on the impact that the current talent management process had had on the business. The majority of the respondents viewed talent management as a moderate value-add for the business. They offered various reasons for why the process had added value, and also for why it had not added as much value as it might have.

Respondent 7 drew attention to two positive impacts of the talent management programme. She explained that the accelerated development programmes had allowed the organisation to identify high-performing individuals and scarce-skilled employees and use the programmes to accelerate either their technical or leadership development. The process had also facilitated the identification of employment equity talent. Respondents 12 and 17 agreed that the talent management process had yielded some positive success stories across the organisation. There were several employees who obtained better skills, a new job, role or pay progression because the talent management process was applied correctly. Line managers who actively use the process correctly ensure that there is great business value-add (respondent 19).

On the other hand, a number of respondents indicated that although the process was well documented in the organisation, it was not applied correctly. Respondents 2, 9 and 29 made use of the term "tick box exercise" in reference to management who attended to career conversations and personal development plans only as an exercise to pass the audit by Human Capital.

Respondent 5 pointed out that the business was not using the instrument correctly. When opportunities for rotations, secondments or transfers came up, the talent profiles created via the talent profile process were not actually used optimally to grant the opportunities to talented or scarce-skilled employees. Nothing in the talent management process proactively assists HIPOs or scarce-skilled talent to progress internally (respondent 14).

According to respondent 4, the talent management process does not work holistically in the business. In agreement, respondent 8 claimed that the business value-add was diminished because the organisation looked at the talent management process in silos, or focused only on the development aspect. The business then experienced the talent management process as disjointed, resulting in units not receiving the full value of the process (respondent 21). Respondent 8 agreed, noting that the segments worked in silos and there was not one specialist focusing on driving succession and development planning. The current system did not add value as it was not able to provide meaningful data or predicative analytics that could be used to make decisions (respondents 2 and 16).

One must conclude that, if used correctly, the process could yield astounding results. However, the manner in which the process was currently being deployed and practised in the business has contributed to a diminished value-add.

Next, respondents were asked if (a) the financial position, (b) the time taken to go to market with innovative product or service offerings, or (c) the brand reputation could have been negatively impacted by the current talent management process. A majority of respondents agreed that the talent management process had had a somewhat negative impact on the financial position of the organisation, organisational brand reputation and the time taken to go to the market with innovative product and service offerings. With regard to the financial position of the organisation, respondents claimed that the length of the recruitment and training process internally had had a significant negative impact on it. Respondents 1, 2, and 10 indicated that the length of the recruitment process directly impacted the financial position. Respondent 13 explained that it can take the organisation up to six months to appoint a suitable candidate to deliver into key projects, which results in financial loss on the project and in the organisation at large. Respondents 19 and 21 agreed that the length of the recruitment and training process had led to actual business revenue loss. When the organisation takes a long time to upskill an individual, the organisation loses financially in generating sales and revenue via that employee. Referring to the sales environment, respondent 28 cautioned that if advisor training took too long, the advisors were unable to write business for the organisation, which led to a loss of time and money.

When the organisation lost a scarce- or critically skilled individual, this led to financial loss because of the cost of recruiting and training a replacement. Also, the individual was no longer with the organisation and therefore not able to participate in activities that generate revenue (respondents 31 and 32).

In terms of the time taken to go to market, respondents claimed that yet again the time taken to recruit individuals with the correct skill set affected how fast the organisation could go to market with innovative product and service offerings. Additionally, the organisational red tape around the talent management process (with specific reference to appointments and preferred service providers for training) negatively impacted the time taken for scarce-skilled employees and talented employees to be ready to make innovative product and service offerings available to the market. Respondent 4 explained that there were governance and red tape issues that hindered the talent management process. It was partly because of the rules and regulations that the recruitment and training process took so long. Respondents 7, 8, 9 and 33 agreed that the amount of governance lengthened the recruitment and training processes, which meant that the organisation took longer to acquire an employee who was ready to add value and design a new product or service that could be introduced in the market. In the same vein, it was alleged that the organisation was risk averse when it came to decision making and therefore the talent management process required a number of sign-offs. As a result, by the

time scarce-skilled employees were ready to go to market with a new product or service, it could be much later than direct competitors (respondents 11, 15 and 16).

According to respondents 17 and 27, scarce-skilled employees in the digital or information technology arena join the organisation because they have a skill that the organisation needs. Yet, once appointed, they were not allowed to challenge how things were done or ask where they might receive training. This frustrates them and does not allow them to come up with creative new offerings for the market.

Other respondents (2, 9, 11, 14 and 31) claimed that the time taken to communicate with candidates in a recruitment process has negatively impacted the organisation's brand. The respondents argued that a lack of, or delay in, communication with potential candidates has adversely impacted both the candidates and the brand. Respondent 31 thought that this might be due to the system being used and its unreliability.

As previously mentioned, a majority of the respondents indicated that the talent management process had impacted the 3 aspects negatively. However, respondents 3, 5 and 12 contended that the talent management process had not impacted factors external to the organisation. Respondent 5 acknowledged that talent internal to the organisation might question the impact of the talent management process, but believed that the external view of the brand was untarnished.

The final question in the interview guide asked the respondents to share their opinion on whether the current talent management system was contributing to the loss of scarce-skilled employees.

An overwhelming majority of respondents answered yes to the above question, for the following reasons:
- Many respondents made reference to the lack of innovation in the current talent management process. Respondent 1 compared the organisation's process to those of other leading South African organisations, arguing that the organisation was lagging behind. The organisation had to do more, starting by looking at how other leading organisations were implementing talent management adjust accordingly (respondent 17). Aspects of the process had to be redefined, with a specific focus on retaining scarce-skilled employees capable of enabling a future-fit organisation (respondents 20 and 24). Respondent 29 added that the current talent management process was thoroughly documented but required a dynamic revamp in order to add substantial value and retain scarce and critical employees.

- The length and complexity of the recruitment and training process were highlighted as factors contributing to the loss of scarce-skilled talent. The organisation should review its policies and the associated regulations and aspects of governance, because the processes take too long (respondent 12). In agreement, respondents 31 and 32 claimed that scarce-skilled employees found these processes tiresome, which resulted in the organisation's losing the candidate to competitors who were able to act faster and more innovatively. Respondent 4 claimed that the entire process needed to be redefined, with a clear focus on creating a superior employee experience.

- Respondents 2 and 6 pointed to the discrepancy between an interview job overview and the reality of joining the team or organisation as a contributing factor. The respondents believed that critical and scarce-skilled employees had been lost to the organisation when what was explained to them in the interview was not what they experienced in reality.

- According to respondents 8 and 11, because the brand was not visible and attractive to the younger generation, it had become increasingly difficult to attract scarce-skilled talent. Digitally enabled future-fit scarce skills were possessed by the younger generation, and these individuals were not necessarily enchanted by the idea of working for a 175-year-old financial giant.

- Respondents 18 and 27 drew attention to the point that talent management is a line management responsibility. When line managers had not applied the talent management process correctly with a scarce-skilled employee, it had led to the loss of that employee, either internally or externally. Respondent 21 agreed that scarce-skilled employees had been lost due to bad management practice.

- Several respondents indicated that the current retention strategies had contributed to the organisation's losing scarce-skilled talent. Respondents 22, 23 and 25 blamed the lack of a proactive approach to retention: both leaders and HR in the business needed to actively engage with top talent and ensure that they were motivated and engaged so as to be productive and add value. These respondents also pointed to the detrimental impact on the business, team members, mentees and direct reports when a top talent employee left. Respondent 9 cited an example: the organisation lost scarce-skilled black African talent on an accelerated development programme. The organisation was not able to retain them even though it had made a significant investment in their development. Because the organisation had not had an innovative approach to retention, it had been easier for individuals with scarce skills to leave because their skills are in such high demand in the market and competitors were able to make more lucrative offers (respondents 32 and 33). Like any organisation, this one would always lose scarce-skilled employees, but it should nevertheless act proactively and seize the opportunity to redefine and improve the current retention practices (respondent 24).

An opposing view was articulated by respondents 5, 15 and 17, who suggested that it was not the actual talent management process that had led to the loss of scarce-skilled employees, but rather its bungled or inconsistent application. The process itself was exceptional, but line managers needed to understand its importance and how correctly and consistently to apply it in order to manage scarce-skilled talent.

5.3 Summary of findings

This chapter has presented the findings of the study by offering a summarised account of the respondents' answers to questions posed in the interviews. What follows is a summary of the presentation under the relevant headings.

- **Attraction, recruitment and onboarding**

Firstly, the sub-section of attraction and recruitment is summarised. Within this sub-section, three apparent discrepancies were identified.

A. Attraction

Feedback indicated that there was a strong organisational dependency on only one active platform, LinkedIn. This was the primary mechanism used to target passive and scarce-skilled employees. The study views this as limiting, since there are many other innovative media available in the market to source candidates with scarce and critical skills. Depending on the type of skill and generational metrics required by the organisation, LinkedIn may not be the appropriate medium to engage with digitally savvy candidates.

Next, there appeared to be a general lack of innovative attraction methods, such as referrals or innovation forums. This is regarded as a substantial discrepancy since many scarce-skilled candidates, especially those with specialised skills in information technology or digital and date skill sets, are more likely to engage with an organisation that promotes brand visibility. Regarding the brand's attractiveness, it emerged that the brand lacked visibility and appeal for the millennial and Gen Z generations. This is troublesome since the scarce and critical skills required in the new world of work are predominantly to be found across these generational metrics. The lack of brand appeal makes the task of recruiting extremely difficult.

B. Recruitment and system usage

There was general dissatisfaction among the respondents with the current recruitment system, oracle i-recruitment. The recruitment system is supposed to enable a fast and efficient process of recruitment in a digitally enabled era. However, the system has limited technical functionality. The respondents regarded it as slow to respond and highly inflexible, difficult to navigate and not user friendly. It precludes proactive engagement with candidates and requires

various manual interventions to complete the recruitment and selection process. While the system allows for applicants to apply internally and externally for vacancies across the organisation, emails, WhatsApps and telephone calls remain the preferred methods of engagement with candidates during the attraction and recruitment phases. The system does not make provision for end-to-end engagement with candidates. This is problematic as there is no one set means of communication for scarce and critical skills employees during the recruitment process. Also, the current system does not allow one to track where scarce- and critically skilled candidates are within the process.

Again, the oracle i-recruitment system was not regarded as the preferred method of targeting passive candidates. There is a huge reliance on LinkedIn in this regard. LinkedIn has proven to be useful in reaching out to older generation candidates in the more traditional insurance-type roles. But it can also be viewed as problematic when it is the only preferred method to target passive candidates, especially younger ones. The passive candidates currently being targeted by the organisation live in a digital arena and are more often active on other forms of social media. If the organisation only makes use of LinkedIn, it misses an opportunity to engage on platforms where the desirable candidates are more active.

Finally, a discrepancy exists in that the human capital team has not leveraged off other business units in the organisation that have previously made use of, or are currently making use of, artificial intelligence systems and software. This has resulted in the recruitment and selection teams having no artificial intelligence in any of the systems or software currently utilised to attract, recruit and onboard technical or scarce-skilled resources.

C. Talent acquisition team skills and capabilities

As the organisation evolves to become a leading digitally-enabled organisation, a crucial measure of success will stem from ensuring that the employees who enable this experience understand the context and benefit of the changes. A huge discrepancy identified is that the organisation has failed to provide the organisational context for change in the mindset and skill set required of the new-age recruiter. This lack of organisational context has led to the current talent acquisition teams not understanding how the role of the recruiter in the new world of work differs from the standard or reactive recruiter role. Traditionally, recruiters would post an advertisement, wait for candidates to apply, then take them through the standard recruitment process, which could take months to conclude. In a digitally-enabled organisation, targeting millennials with the scarcest digital, data and technology skill sets, this traditional method can be a huge hindrance, and more innovative methods are required.

A related discrepancy identified is that the organisation lacks clearly defined roles and responsibilities for talent acquisition specialists and standard recruiters. Both roles still follow the traditional recruitment process, heavily weighed down by multiple steps and approvals. The sheer volume of standard and traditional recruitment is too great to leave room for proactive attraction and sourcing. The culmination of these discrepancies is that no provision is currently made for a proactive process that is inviting and attractive to scarce- and critically skilled employees.

- **Learning, training and development**

This section summarises the discrepancies identified in the learning, training and development sub-section. First, it is important to acknowledge that there was no evident gap or discrepancy in the manner in which learning, training or development needs are identified within the organisation. The findings indicate that the organisation uses a thorough needs analysis process to determine the business need for training. Training may be mandated by a variety of requirements, including legislative, performance, system, product or process. Once the need is identified, Human Capital and the internal learning, training and development teams get involved and the business, HC and the internal L&D team decide on the most appropriate initiatives to address the learning need.

There was also no evident gap or discrepancy in the manner in which funding was allocated for learning, training or development, with the vast majority of respondents indicating that appropriate budgets were available.

It is evident that external service providers and technical or tertiary institutions are the organisation's preferred suppliers of scarce skill training. The internal L&D teams are predominately used for standard role-related training. The glaring discrepancy identified is that the internal L&D teams are not equipped to train for scarce or critical skills, especially in the digital and data fields. It appears that the organisation is confident in the ability and skill set of the internal L&D teams to train and develop for standard training based on product or service offerings. The corollary is that the organisation does not believe that the internal L&D teams have the required skills, abilities, experience or tool set to train for new-age scarce skills. This viewed is shared by members of the L&D teams as well. This is noted as a large discrepancy because the majority of the skills required to shift into a digital arena require upskilling, training and development in new technology, software and systems. With the internal L&D teams being unable to train for these skills, the organisation will continue to spend exorbitant sums of money on contracting with service providers or training vendors to supply the appropriate training.

Another related issue is that the intellectual property involved never remains within the organisation. There is a lack of internal intellectual property build. Without the internal L&D teams being equipped to train for these skills, the cumulative transfer of skills becomes impossible.

- **Retention**

This section summarises the discrepancies emerging from the interview sub-section on retention. The findings identified multiple reasons why scarce- and critically skilled employees left the organisation. This is noted as a discrepancy as it suggests that the organisation lacks an understanding of what retains a scarce-skilled employee, or what should be regarded as top talent.

Factors such as a lack of growth and promotion, poor compensation and benefits, and a lack of challenging work were all cited as contributing to scarce-skilled talent leaving. This is noted as a discrepancy because without aggressive retention strategies aimed at addressing these issues, the organisation will continue to lose talented employees. Moreover, since there are several push factors, the organisation requires a multi-dimensional review of its retention strategies to combat a high attrition rate, especially among those with skills that could conduce to wider digitisation.

Regarding the most common extrinsic retention factor, namely monetary reward, there is a general unevenness in how employees experience the compensation and benefit structures offered by the organisation. A portion of the respondents viewed the organisation as offering a good salary, on par with the market, while others felt that the salaries were not lucrative competitive. This is noted as a discrepancy because the market is often willing to pay high salaries to attract scarce and critical skills externally. Another theme emerged around the organisation's not offering benefits like work from home, flexible working hours or tangible or product-related benefits. This is noted as a discrepancy as new-age employees may desire such benefits to commit fully to an organisation.

Regarding the intrinsic aspects of workforce engagement and culture, there were mixed perceptions of how these factors influenced the retention of scarce- and critically skilled employees. Respondents who indicated that employees were not engaged attributed their view to two aspects, (a) the pace of organisational change and (b) management relationships. While the pace of organisational change is noted as a factor, it is not categorised as a discrepancy in the talent management process. At the outset of this study, it was explained that the organisation is embarking on a steep change curve. The intention of this change is to ensure that the business remains relevant in an increasingly digitally-dominated working and sales

environment. Reservations about the pace of change are thus regarded not as a discrepancy but rather as discomfort inevitably consequent on the change mandated within the organisation. The organisation should however ensure that the relevant change management principles are adhered to.

Regarding management relationships, respondents noted that a strained relationship with management was a strong push factor in the loss of scarce-skilled employees. This is regarded as a significant discrepancy within the talent management process, as employees were often attracted and recruited because of the organisation's employee value proposition. This is grounded in values such as respect, integrity, diversity and inclusion. It was apparent that the failure of leaders within the organisation consistently to display these values led to the loss of top talented employees. Closely linked to the above, respondents cited bad management practices and increased work pressure as factors that prevented employees from experiencing an encouraging work culture.

What therefore emerges as a considerable discrepancy within the organisation is that intrinsic retention aspects are largely variable, dependent on factors such as leadership, role, age and specific business unit. The organisation lacks a holistic approach to ensure that scarce- and critically skilled employees operate in a working environment that consistently supports and motivates them.

When current retention strategies were compared with potential modern retention strategies, it became apparent that the organisation had invested in various retention strategies such as share allocation, rotations, bonus allocation and learning and development opportunities. In other words, the organisation was employing retention mechanisms that would retain the traditional employee. Yet these might not be sufficient or appropriate to retain new age, scarce-skilled employees.

There are discrepancies in the application of modern techniques such as management monitoring, HR retention metrics and transparent communication. In some business units, management monitoring is considered taboo and unheard of. The organisation has not managed to convince all its employees that management monitoring can foster a healthy, psychologically safe environment, inducing staff to stay with the organisation for a longer period of time. With reference to HR retention metrics, a substantial discrepancy is noted in the use and application of metrics. This is attributed to the HR community's not having a system capable of generating the required information, nor the skill set to manage large sets of data and simplify them for meaningful use.

With regard to transparency of communication, another discrepancy is noted. The level of transparency is yet again dependent on the business unit, the leader and the team in which the employee is situated. There is no consistent application in how and when the organisation communicates with the staff. This is noted as a discrepancy in terms of retaining scarce-skilled employees as it creates an environment of uncertainty.

An overarching discrepancy that emerged across the retention sub-section is that the organisation lacks consistency in the implementation and application of talent management strategies. This translates into employees' experience being arbitrarily differentiated, and this too has had a negative impact on the retention of scarce and critical skilled employees.

The last sub-section in the interview guide, relating to business impact, is used to answer the research question that guided the study.

5.4 Research question answered

The main objective of the study was to determine if the lack of an innovative talent management process at the organisation in question had led to a substantial loss of talented critical and scarce skilled employees .In order to achieve the objective, the research was guided by the following question: "How are the current talent management practices lacking in terms of recruiting, developing and retaining newly identified scarce skilled employees?" It is time to address the core issue
of the impact that the discrepancies identified have had on the organisation and its loss of scarce- and critically skilled employees.

The last question in the interviews asked respondents to share their opinion on whether, based on their own experience, the current talent management process had contributed to the loss of scarce-skilled employees. An overwhelming majority answered yes to the question. The respondents cited (a) a lack of innovation in the current processes, (b) the length and complexity of current processes, and (c) the inconsistent application and implementation of documentation practices.

The data generally has pointed to gaps or discrepancies in the current talent management process. These are concentrated in the questions of how to attract and recruit those with scarce skills, the relevant training offered to develop or enhance scarce and critical skills, and the mechanisms that are important for the retention of this type of employee. It is worth emphasising that the organisation has processes, options and mechanisms in place that are sufficient in terms of the attraction, development and retention of the traditionally profiled employee.

5.5 Summary

This chapter offered a comprehensive discussion of the research findings, centring on the interviewees' responses and focusing on whether discrepancies exist within the current talent management process. The findings were summarised, and the research question posed at the outset of the study was answered. Due assessment of the research data reported and discussed above informs the recommendations made in the next chapter.

CHAPTER 6:
RECOMMENDATIONS AND CONCLUSION
6.1 Introduction

The previous chapter identified discrepancies within three sub-sections of talent management at the organisation under study, namely (a) attraction, recruitment and selection, (b) learning and development, and (c) retention. Now that these discrepancies have been revealed, it is incumbent on the researcher to provide practical recommendations to address them.

Kara (2012:507) explains that in evaluation and action research, the researcher is required to write recommendations for future action and/or future research. These recommendations should be clearly linked to the research findings and discussion. This chapter therefore provides recommendations linked to the key discrepancies identified, followed by a holistic recommendation aimed at a more innovative talent management practice and an overall conclusion.

6.2 Recommendations

The following section provides recommendations regarding the key discrepancies identified and discussed relating to the three main sub-sections of talent management.

6.2.1 Attraction, recruitment and onboarding recommendations

There were several discrepancies identified within this subsection. What follows are key recommendations aimed at helping the organisation to move to more innovative attraction, recruitment and onboarding practices.

6.2.1.1 Use of numerous proactive resourcing tools

The feedback indicated a strong organisational dependency on one proactive sourcing platform, namely LinkedIn. As suggested in the previous chapter, LinkedIn may not be the most appropriate platform to use to source and engage with digital savvy candidates. It is therefore recommended that the organisation begins to use multiple proactive sourcing platforms. Making use of different platforms will help the organisation to capitalise on a system that provides access to candidates that possess the skill set, knowledge and experience that the organisation requires to move forward with its strategic objectives. It also enables the organisation to advertise the organisational and team culture as a factor to attract passive scarce-skilled candidates.

The use of more than one proactive sourcing tool will permit the organisation and talent teams to target a variety of scarce-skilled candidates to meet the immediate and future needs of the business.

As was explained earlier, the organisation aims to transform to digital engagement with its clients and business stakeholders, the majority of the skills sought after may be found on platforms such as Github, Stackoverflow, BitBucket, Gitlab, Beanstalk, SourceForge and AWS CodeCommit. While these are not necessarily recruitment platforms, they do showcase the use of the most cutting-edge software and digital technology. Should the organisation create a presence on these platforms, talent acquisition specialists will be able to identify individuals who own the scarce skill the organisation is searching for.

It is also recommended that the organisation utilise more innovative methods of attraction and onboarding. For instance, the referral programmes need to be made more exciting. The following are some innovative concepts that the organisation could implement in order to entice employees to participate in the referral programme:

- Rebrand the programme – showcase it excitingly to entice employees to recommend people within their networks. Raise awareness of the programme and the categories and rules associated with it. Enhance understanding of how the programme will be implemented
- Create tiers or levels of expertise within the programme
- Allocate a reward per referral. This need not be monetary, or not only monetary, as long as it makes the employee feel valued. It may include a cruise, an external trip to a company of their choice to see how things are done, days off or an experiential gift such as cooking lessons or an advanced driving course, etc. Additionally, offer to sponsor or fund a cause of the employee's choice.
- Showcase success stories of employees who have had a successful referral.

Investing in a new referral programme, customised to the organisation, will yield many benefits. It is a great way in which to hire experienced or appropriate hires and reward employees for helping to build a great talent pipeline (Mysore, 2019; Masselos, 2020).

6.2.1.2 Brand refresh and reintroduce to talent market

The feedback indicated that the brand was not appealing to the younger generations, which is concerning since most of the scarce skills required to transform to a leading digital organisation resides within these generational metrics. In order to boost brand awareness and attractiveness, it is recommended that the organisation re-position within the market to appeal to the millennial and Gen Z market.

First, it is recommended that the organisation undertake thorough research and analysis of the millennial and Gen Z market. The organisation needs to create awareness among recruiting line managers of who is categorised as a millennial and Gen Z employee. It is important for recruiting line managers and talent management practitioners to understand the similarities and differences between millennials and Gen Z. The fundamental questions to be researched are: What motivates millennial and Gen Z employees? And how does the organisation attract and recruit millennial and Gen Z employees?

The organisation needs to establish what factors act as intrinsic and extrinsic motivating factors for this demographic. Such knowledge would enhance the ability of recruiting line managers and talent practitioners to attract scarce-skilled employees by offering what it is that they most want. For example, Gen Z and millennials are allegedly motivated by purpose and making a difference in the role, so they will be attracted to a brand that promotes meaningful work. Gen Zs are also supposedly motivated by security and therefore would be attracted to an organisation that can offer longevity, promotion and progression. Again, millennials are teamwork orientated, while Gen Zs are driven by competitiveness. With a grasp of these key similarities and differences, the organisation could use advertisements, wording and graphics that appeal to these motivation factors, thus luring the generation with the scarcest skills to work for a financial services organisation.

Of course, a key similarity between the two generations is that they are equally digitally native, so it is vital to ensure work opportunities will allow for them to flit between the latest technologies and software. It is therefore imperative that the organisation shifts advertisements, attraction campaigns and interview processes to incorporate aspects that would appeal to the younger generational metric groups. Once the organisation has re-branded and re-introduced itself to the talent market, the brand will become an employer of choice for scarce-skilled employees because of the culture, environment and work opportunities available at the organisation (Graham, 2018).

Moreover, to create brand visibility and appeal with the millennial and Gen Z market, it is recommended that the organisation use organisational influencers. These employees have the power to influence because of their access to a highly developed network. They act as brand ambassadors and drive brand engagement and recognition. They showcase why an organisation is an employer of choice. The organisation can utilise talented employees to share their experience on social media platforms such as Instagram, Facebook and Twitter in order to create excitement about the work opportunities available at the organisation. The strategy should directly target the millennial and Gen Z groups, so the creative content must be of such a nature that it appeals to those groups (Pointer, 2016).

6.2.1.3 System and infrastructure improvement

A notable result was the dissatisfaction respondents voiced about the oracle i-recruitment system currently used as the standard organisational system for attraction and recruitment. To address system failures and technical issues reported with the oracle i-recruitment system, the organisation has introduced a new human capital system across the organisation, known as Workday. The global Workday system is a cloud-based human resource management solution. The system is scheduled to be introduced into the organisation in September 2020. The attraction, recruitment and appointment model will address many of the discrepancies and difficulties discussed in the previous chapter, introducing a faster system, a single point of engagement with candidates and a more user-friendly interface. The introduction of the system has created excitement amongst the Talent Acquisition teams and business in the way it promises to shift the processes of attraction, recruitment and appointment of talent, delivering a superior experience to candidates and the business.

Whilst Workday is a global product, many of the features require customisation to mesh with the organisation's processes and signoffs during the attraction, recruitment and appointment cycle. When migrating to the new system, it is recommended that the technical project team consult with the TA teams and specialists to build in as much automation and use of artificial intelligence to streamline progressions and approvals during the process. This will ensure that the time it takes to recruit and appoint is as short as possible, given how quickly scarce-skilled candidates can be approached and poached. The TA teams should be able to enjoy a quick, seamless and enjoyable process when dealing with candidates who hold skills that the organisation requires to shift to the digital era (Workday, 2020).

In line with a refreshed technology offering and moving to a more innovative infrastructure, it is recommended that the TA teams are encouraged to recruit on the social media. TA specialists do not currently have specialised access or corporate profiles to embark on social media recruiting (the phrase used to describe recruiting via social platforms and media such as Facebook, Twitter and Instagram). It is therefore recommended that the Human Capital central talent management team engages with the Information Technology (IT) Infrastructure team to arrange for the relevant access and security protocols to be granted to permit recruiters' safe and secure engagement on social media platforms. If TA specialists are looking for passive candidates who do not regularly update their LinkedIn profiles or online portfolio, access to social media sites allows them to view the interests and work of potential candidates, especially those in the digital or information technology arena. Moreover, since remote working and "working from anywhere" has been a trending concept in the new world of work, it is imperative that the TA teams have the necessary infrastructure to communicate with scarce skilled candidates, digitally.

Currently, the remote working platform used across the organisation is Microsoft Teams. While this system allows for TA teams to send links to external candidates, it is recommended that the organisation adopts a more flexible approach in terms of means and modes of communication. It is thus recommended that the TA teams be granted access to virtual engagement tools such as Zoom, Skype and Google Hangout. The TA team leaders and IT teams should engage to decide which systems to allow access to, based on security protocols and the benefits offered by each system. These additional platforms will provide the flexibility for the TA teams and specialists to reach out to passive scarce-skilled candidates. They will showcase the organisation's ability to cater to the candidate's preferred medium of engagement and project the image of a new-age organisation (Voip, 2020).

6.2.1.4 Enhanced people investment

Chapter 4 revealed a discrepancy between investment in the actual function of talent acquisition and the skills required to shift to the new world of work. In order to address the discrepancy, the research makes four key recommendations to shift to a more innovative talent acquisition function.

- Set organisational context
- Redefine talent acquisition
- Invest in innovative training offerings
- Invest in memberships and networking permits.

Set organisational context

To resolve the discrepancies in the organisational context around the notion of change, it is recommended that the organisation leads a change campaign. The campaign is to be centred on the new world of work and the evolving role of talent acquisition and should include the rationale for change. The rationale for change is the challenge of how the organisation is required to operate and thrive in an era of perpetual change, and how the digital era requires a novel set of skills from those who attract and recruit scarce-skilled talent. The division of human capital, together with leading executives, should host change management workshops, road shows and interactive sessions that explore and explain how the organisation now requires forward-thinking approaches to talent attraction and selection. Their function would be to alert those in talent acquisition roles to (a) what roles are considered scarce, (b) what future-fit capabilities may be rare to source, and (c) what tools are available to the talent acquisition teams to source and attract those with the skills required.

In setting the organisational context, it is important that the human capital leadership explain how adopting a future-fit attraction and selection strategy will ensure that the organisation is able to attract and recruit those with the skills to enable a digitally transformed organisation.

Redefine talent acquisition

In the new digital era, there are new rules of engagement for attracting and recruiting talent, especially scarce-skilled talent. It is therefore recommended that the organisation discard all previous notions of what a "recruiter" should be and redefine talent acquisition holistically. The first step is clearly to outline the difference between those who are required to do standard/ traditional recruitment and those who are required to do specialised attraction and recruitment, specifically aimed at attracting and recruiting passive scarce-skilled talent.

The recommended approach is to ensure that each business unit has a digital talent acquisition specialist whose function is to attract and recruit scarce-skilled talent. Such a specialist would possess a unique combination of communication, marketing, digital, relationship building and network cultivating skills. S/he would no longer only recruit against business requirements, but rather shoulder the larger responsibility of defining the current and upcoming talent needs of the organisation. Such individuals would take part in strategic discussions and understand the organisation's goals and objectives to align the talent strategy with them. The key media through which they source talent would be digitally-based and social media channels. They would also capitalise on face-to-face interaction and networking events.

Secondly, in redefining the concept of talent acquisition, it is recommended that the organisation appoint what is known as a technical talent acquisition specialist. The technical TAS possess, over and above a digital skill set, an in-depth knowledge of their industry and the roles they recruit for. They hold a specialised understanding of the technical jargon, systems, processes and applications for which they recruit. They can converse with scarce-skilled candidates and grasp a technical and organisational fit in one interview. This limits the time the organisation takes to attract, recruit and place a scarce skilled individual (Talentvis; Job Hero, 2020).

Invest in innovative training offerings

While acknowledging that standard process and system training is amply provided for in the organisation, it is recommended that the organisation move to invest in more innovative training offerings for the talent acquisitions teams. Once the organisational context is set, the organisation should send the TA teams on a training course centred on understanding and implementing digital transformation and innovation. This will equip the TA teams with an understanding of what type of roles, skills and traits enable an organisation to respond to new digital opportunities and possibilities. This in turn will ensure that they are supplied with the knowledge and skill set to attract and recruit the appropriate scarce-skilled talent externally.

Next, it is recommended that the TA teams undergo specialised proactive sourcing training. This training should include a deep dive into understanding how to source proactively and the tools that are available to help one do so. It is recommended that the training include topics such as social media recruitment, the use of Boolean searches, building talent profiles and pipelines and deriving return on investment from sourcing. As mentioned previously, scarce-skilled talented individuals are often passive candidates not actively looking for alternative opportunities, and therefore it is important that the TA teams are equipped to locate and entice these candidates with exciting opportunities at the organisation. This training could include courses that offer a specific certification, accreditation or qualification in people sourcing.

Another recommendation is the use of vendor training so that the organisation can leverage off the vendors with which they partner. The training offered by the vendor or supplier will allow the TA teams to equip themselves with technical knowledge across the industries in which they recruit, e.g. TA teams should collaborate with vendors such as Torque IT or Michael Page to gain information on the latest systems, applications and process available and sought after in the market. This would enable the team to communicate with passive scarce-skilled candidates in a language that is appealing to them (Mostyn, 2016; Insead, 2020; CPSP, 2020).

Invest in memberships and networking permits

In order to enable the TA teams to attract and recruit scarce-skilled employees, it is recommended that the organisation invest in memberships and networking permits for forums such as IAB South Africa. The benefit of the TA teams belonging to these forums is that it would enable them to engage with thought leaders within the digital industry and ensures that they have easy access to the latest digital trends, research and knowledge. Being knowledgeable and eloquent in everything digital would empower the TA teams to engage fully with those with scarce skills. Membership in such forums would enable the TA teams to be part of conversations about industry standards and best practices for how to transform and digitally enable an organisation. It would also give the TA teams an opportunity to showcase the organisation's research, technology and applications, and potentially use this to leverage and attract key critical resources to come and work for the organisation. Such memberships open invitations to prominent webinars, networking events and conferences, granting access to leading specialists within the industries. The TA teams can then use this to the organisation's advantage either by recruiting these specialists or networking to get referrals to others who hold similar skill sets that the organisation requires (Iabsa).

6.2.1.5 Streamline recruitment process

Chapter 4 revealed that there were several governance and red tape measures hindering the talent management process and prolonging the recruitment and onboarding of scarce-skilled and talented employees.

It is therefore recommended that the organisation embarks on streamlining the recruitment and onboarding process. It is acknowledged that the organisation operates in a financial services environment and will always require mandatory due diligence. However, it is recommended that the process for approvals to recruit and appoint be streamlined. In addition, the TA teams should ensure that they simplify the process as far as possible for the candidate. The team should not be bound by completing one step after another in a particular order, but rather adopt an agile and flexible approach whilst adhering to the requirements for due diligence.

It is also recommended that the organisation invests in creating a more appealing and enjoyable process for those who hold scarce skills by introducing gamification into the recruitment process. For candidates with scarce skills relating to digital, cyber security and software development, gamification enables the organisation to test their abilities, grit and thinking patterns before meeting them in an interview. Gamification can feature simulation assessments, coding tests and online challenges with relatable organisational scenarios. Moreover, it creates a fun-filled experience for the candidate to showcase why they are the most suitable candidate for the role, while moving away from the traditional view that the best candidate is the one who scores the highest on their interview guide rating.

In sum, the recommendations offered in this section were aimed at shifting the organisation to adopt and more appropriate practices for attraction, recruitment and onboarding.

6.2.2 Learning, training and development recommendations

As made explicit in the Chapter 4 summary, the study acknowledges that the segments included in the study follow a comprehensive process to identify a learning, training or development need. There is therefore no evident gap or discrepancy in the manner in which learning, training or development needs are identified within the organisation. In addition, there is no evident discrepancy in the allocation of funding for learning, training or development.

The study nevertheless provides five recommendations as guidelines for the organisation to shift to a more innovative approach to learning, training and development. These are discussed below.

6.2.2.1 Infrastructure improvement

As discussed in Chapter 4, the oracle i-learning system does not allow for scarce-skilled employees to do online learning at their own pace and in their own time. The system lacks the functionality for digital online learning solutions and only very rarely offers the most topical

industry or technical learning. Scarce-skilled employees require flexible access to infrastructure that supports online learning so as proceed in their own time and place and at their own pace.

The organisation has introduced a new human capital digital solution called Workday. Workday has promised to fundamentally shift the way in which employees are able to access and enrol for learning and development initiatives. However, given this study's focus on scarce-skilled employees, it is recommended that the learning and development department ensures that the Workday system encompasses access to the most sought-after digital skill training and development. More generally speaking, it is recommended that since its strategic intent is to shift to a digital-led customer experience, the organisation invest in technology and infrastructure that can deliver on this commitment to itself and its external customers. It is thus recommended that the organisation purchases the hardware and software required to enable this shift. Moreover, the organisation should encourage access to channels such as YouTube to enable learners to access how-to guides and demos related to their course of study.

In moving to a more innovative approach to learning, it is recommended that the organisation introduce gamification into the learning content. The concept of gamification permits the internal L&D teams to create an innovative way to learn and acquire scarce skills by introducing questions and rewards in the form of points, badges, and levels. It is equally important to ensure that the learning management system on Workday has a great user experience design so that learners can navigate the system with ease and enjoy its aesthetic design. Since the organisation is large and demographically split, learners who are interested in the same course of study should be enabled to communicate and share experiences. This builds a sense of community and teamwork among employees as they navigate courses that are aligned to the fourth industrial revolution (Growth Engineering, 2014).

6.2.2.2 Process Improvements

As acknowledged above, a thorough process is followed in identifying learning needs, although it is recommended that the central L&D teams review the current learning paths, to make sure these are aligned with the scarce and critical skill capability builds. In essence, business units should be held accountable for building scarce and critical skills and contributing to skills development. To make this possible, the organisation needs to ensure that a degree of flexibility is introduced with the new learning paths. The aim would be to avoid boxing employees into a specific job description and therefore learning only about the roles and responsibilities associated that job description. It is recommended that the organisation invest in measuring and understanding employees' aptitudes and abilities for broader roles that are more aligned with the future-fit world of work.

Once the organisation has equipped internal employees with scarce and critical skills, business units must assume responsibility for creating new opportunities in which the skills can be utilised. The organisation should avoid limiting talent rotations per segment and rather capitalise on the use of the scarce and critical skills across the organisation, irrespective of location, segment, or business unit.

6.2.2.3 Build strategic partnerships with industry experts

As noted in the summary of the findings, external service providers, including technical and tertiary institutions, are the organisation's preferred supplier for scarce and critical skill training. This is understandable and to an extent acceptable since the fourth industrial revolution skill set evolves at such a rapid pace. But given the size of the organisation concerned here, it is recommended that it build and establish strategic partnerships with industry experts and leaders. Once the scarce and critical skills for a future-fit organisation have been identified, it is imperative that the organisation partner with leading experts in the industry to ensure that they have access to the most relevant experts in the market for the transfer, teaching and upskilling of critical skill sets.

These partnerships will enable the organisation to have access to the most cutting-edge training and certifications required to transform to a digitally-led organisation. The partnerships will allow for the L&D team to enrol employees with the aptitude and ability in courses that build digital and technology-related skill sets. They will also ensure that individuals with scarce and future-fit skills have access to bespoke development plans and full information regarding re-skilling and upskilling on the modern technology stacks, applications, systems, and behavioural skills for future-fit employment.

An additional benefit of this modern offering is that it would allow the organisation to progress at the pace at which the digital world is evolving. By partnering with leading suppliers, the organisation always has access to what is coming and can capitalise on this to gain market share or customer base within the market. It is recommended that the organisation focus largely on partnering with specialist industry experts. The rapid pace at which the organisation changes makes it necessary for key employees to be upskilled as quickly and efficiently as possible. To have those employees upskilled quickly with the latest technological, data and analytical skills, the organisation can make use of strategic partners who specialise in this. This will ensure that the organisation's resources can utilise the new skill to digitally enhance the customer and employee experience at the organisation.

Another benefit of this approach is that many of the latest scarce and critical skills have a limited time span in which they are considered scarce and critical, so by partnering with a specialist, the organisation would only train and upskill for the skill concerned in the period in which it is relevant and required. As soon as there is a change in the skills required, the organisation has the flexibility of moving quickly to adapt and upskill key resources. Lastly, strategic partnerships allow access to prime learning and development opportunities, which in turn act as retention mechanisms for those with scarce and critical skills within the organisation.

6.2.2.4 Transfer of skills to internal L&D teams

As mentioned above, the organisation relies heavily on external service providers for the delivery of scarce and critical skills training. Whilst it is recommended that the organisation should build and leverage off strategic partnerships, it is also recommended that upon contracting with these service providers, the organisation inserts a transfer of knowledge clause. This would entail the service provider's transferring knowledge of training materials to the technical trainers within the internal L&D Departments. The knowledge transfer can be described as a process whereby the service explicitly provides knowledge to the internal training and development teams for them to use and apply in future. It is recommended that the organisation make use of two types of knowledge transfers. One is known as codification, which involves the service provider making available transfer documents, repositories, and knowledge databases for how to train for scarce skills. The other is personalisation, which involves interaction between the service providers and the internal L&D teams. During this interaction, the parties agree on a plan for knowledge transfer. This may include upskilling of the internal L&D teams by the service providers so that they can roll out the scarce-skills training to the organisation at large. As a result, the dependency on external service providers can be reduced while internal L&D teams build capacity to train for future-fit skill sets (Martin, 2018; Farrington, 2020).

6.2.2.5 Inspire an innovative learning culture

It is acknowledged that the organisation prioritises and makes a significant investment in learning, training and development in support of productivity and sales. However, in order to shift to a more innovative approach to learning and development, it is recommended that the organisation builds an innovative learning culture. The organisation should start to encourage controlled risk, by building a learning culture and providing opportunities for employees to learn new skill sets and apply them differently within the organisation, with a key focus on enhancing customer or digital experience and engagement.

Moreover, it is recommended that the organisation invests in a learning play pen. This acts as a building where employees can upskill, enhance, and transfer new aged skills. In addition, use the latest technology, software, and hardware to create and refine current business processes and systems. The play pen acts as a source of collaboration, in that it allows the most talented employees and those who hold scarce and critical skills to come together and share innovative thinking to pioneer business processes and systems.

In addition, it is recommended that the organisation starts to encourage healthy competition. Create a visible display that showcases to the organisation which employees have certifications, accreditations, and enrolments into future-fit skill sets. This will act as a source of motivation for others and inspire the entire organisation to acquire a future-fit skill set (Landry, 2017).

6.2.3 Retention recommendations

The following sub-section provides recommendations for the organisation to move to a more innovative approach to the retention of employees, especially those with scarce and critical skills.

6.2.3.1 Adopt a prime talent management strategy

In Chapter 4 it became evident that multiple factors influenced why scarce-skilled and critical employees exited from the organisation. It is acknowledged that the organisation conducts talent reviews, and a portion of this review includes questions that aim at understanding what will keep top talent at the organisation. What appears to be lacking is follow-through and implementation of measures to mitigate the factors identified.

It is therefore recommended that organisation hold the business segments and their human capital partners accountable for ensuring that top talent is carefully monitored, developed, and challenged. The organisation wants all employees to feel valued and appreciated. But in moving to a bolder and more innovative retention strategy, it makes sense to focus especially on those who hold the skills that can make the business a forerunner in the markets. It is recommended that the organisation start treating employees who are ranked as top talent differently. This might involve more exposure, better pay and exciting and challenging work opportunities that are aligned to the new world of work. It is not of course recommended that other employees be ignored or neglected, but just that management and leadership become more aware of the value of retaining top talent.

6.2.3.2 Modernisation of extrinsic retention factors

A key discrepancy discussed in the previous chapter is that the organisation's extrinsic retention factors require modernisation. Based on the key items identified in the study, it is recommended that the organisation implement the following.

6.2.3.2.1 Review of monetary reward

It is acknowledged that the organisation is governed by pay lines and rules around salary on appointment. However, it is recommended that the organisation, together with the remuneration and benefits centre of excellence, review the monetary reward of those employees considered top talent and who hold scarce and critical skills. There is a limited number of candidates available in the South African market who have the skill set required by the organisation if it is to transform. It is therefore recommended that the organisation take a calculated risk to retain these employees by paying them above market average. This will help to ensure that these employees feel valued and motivated to contribute to the shift that the organisation requires. Smaller competitors would find it exceptionally hard to match these employees' total guaranteed package.

Building on the above, it is recommended that the organisation ensures that it communicates transparently and commits to future financial growth should scarce- and critically-skilled employees remain with the organisation for set periods of time. The organisation will then be able to make definite plans for strategic business delivery based on the scarce and critical skills available to them. What is more, scarce-skilled and critical employees will be able to project financial growth and plan for their futures accordingly.

In addition, it is recommended that the organisation move to a new-age approach of allowing the relevant General Managers and their senior HR Partners to make decisions around discretionary awards, bonuses and increases that will serve as a retention mechanism when required. While it is recommended that they continue to follow due diligence, they need to find a way of streamlining decision making so that efficient decisions can be implemented at speed (Boitnoit, 2018).

6.2.3.2.2 Introduction of organisational fringe benefits

It is noted that the organisation does not offer fringe benefits linked to the industry or organisational products or services. To move to a more innovative offering, it is recommended that the organisation make available fringe benefits that engender enthusiasm and a sense of pride in belonging to such a prestigious group. The fringe benefits will act as an add-on to the employee's actual total guaranteed package.

Since the organisation is largely a financial services provider, it is recommended that employees be offered discounted rates on products such as:

- Individual and family life cover
- Education policies
- Savings and investment products
- Car and householder's insurance policies.

The intention is to retain employees by making them unwilling to forfeit such benefits. Fringe benefits also enhance a sense of brand loyalty.

6.2.3.2.3 Introduction and application of flexible working conditions

The feedback indicated that the organisation was too restrictive and prescriptive regarding the selection of benefits. It is therefore recommended that the organisation introduce more flexibility on items such as medical aid selection and retirement savings options. In order to retain talented employees, they should be allowed to choose benefits that suit their circumstances. This shows employees that the organisation acknowledges and accepts that different employees value different benefits based on different life stages and lifestyle choices. Scarce-skilled employees will have full control of the management of their benefits. At the same time, the provision of organisational benefits becomes a less contentious topic.

6.2.3.2.4 Introduction of skill-based pay

A modern extrinsic technique that is recommended is the introduction of skill-based pay. Skill-based pay is a monetary remuneration system in which employees receive an increase or additional pay for attaining a formal certification or accreditation in line with the competencies and capabilities the organisation wishes to build.

Since the organisation aims to transform into a digital-led organisation, it is imperative to reward employees who strive to attain the skill sets required for this to happen. It is recommended that the organisation creates a transparent charter around the scarce and critical skill sets required to transform the organisation, while applying a transparent reward system for those who attain the required skill sets, knowledge and competence.

The intention is to retain scarce-skilled and talented employees to capitalise on their skill sets. Such a system also fosters an environment in which skill sets are built and bolstered. Employees can obtain a new skill, alternatively refine or advance a current skill set. The skill-based pay acts as an extrinsic motivation factor, encouraging employees to ensure they are equipped with future-fit skills. It can also serve to attract employees in the external market who are willing to study and have the required aptitude and experience to join this organisation (Mighty recruiter, 2020).

The following recommendations focus on how the organisation can enhance intrinsic retention factors, with a key focus on being more innovative.

6.2.3.3 Enhance intrinsic retention factors

The data suggests that some employees are passionate and engaged and others are not. This divide appears to be the result of employees experiencing various intrinsic retention factors differently. To have an engaged, passionate and loyal workforce, it is recommended that the organisation introduce a refreshed approach to what should be standard practice within an organisation as large as this one.

6.2.3.3.1 Change management and communication

The study acknowledges that changes will always be prevalent in an organisation that aims to transform and stay ahead of its competitors, especially in the fourth industrial revolution. But the organisation must remember to take along on the journey its most valuable resource, its staff. It is therefore recommended that the organisation invest in the management of change and communication about it, to make sure employees understand the reasons for upcoming change and are prepared for it.

Digital transformation is key to the sustainability of this organisation. Yet the process may fail if it lacks the resources, attention and awareness of what is required to execute a change management plan. Traditionally, the organisation makes use of the ADKAR model of change. The model's acronym unpacks as follows: A – Awareness, D – Desire, K – Knowledge, A – Ability and R – Reinforce (Tang, 2019:47). While the model has yielded positive results. It is recommended that the organisation introduce more innovative ways of implementing its change strategies.

Since the organisation has a focus on attracting and retaining the younger generation, it is important to appeal to them differently by making use of innovative change management. Harrington (2018:21) explains that innovative change management is a combination of project change management (PCM) and culture change management (CCM). The PCM aspect focuses on the project or programme implementation, whilst the CCM centres on penetrating the organisation's culture, employee behaviour and operational habits post the change.

The innovative change management approach will bring about benefits for the organisation, as the strategy aims to successfully embed the change, with minimum risk of failure. Moreover, it is designed to ensure that employees understand the urgency of the change activity, but with minimal stress and with relevant support mechanisms to help them through the change.

In addition, the organisation needs to shift to a more innovative way of getting employees excited about change. The study recommends that there is a focus on the 5 Ps below:

- Pride – Introduce change elements that make the employees proud of their work and the organisation they work for
- Performance – Employees are encouraged to perform effectively and efficiently and rewarded accordingly if they do
- Prestige – The organisation is well known and admired for the type of products and services they produce. Employees must want to work for the organisation
- Pleasure – The change must bring pleasure to employees. They must enjoy coming to work in a happy and healthy work environment and culture
- Profit – The change should bring about an increase in profits and as a result, employees should be paid well.

This will be useful for the organisation as it continues on its vigorous change journey. The well-being of employees must be prioritised as the change is introduced and embedded.

6.2.3.3.2 Drive an organisational culture shift

What became apparent in the findings was that employees were having a different experience of key issues based on various factors such as role, leadership, age or the segment they were in. To ensure a more consistent and positive experience, it is recommended that the organisation adopts an organisational culture. The organisational culture is organisation-wide and is not limited to a specific business, leader or segment, rather encompassing what Weinzweig (2020) calls the "personality of the company". It is recommended that the organisation creates a manifesto that outlines what is expected in terms of culture from each employee. It should include an account of the behaviours expected and how employees are expected to treat customers, co-workers and the community.

The traditional approach is for an employee to join an organisation and hope that they enjoy the team or segment dynamic or culture. A more modern approach is required: that is, when a new employee is onboarded, the team facilitating the induction should focus on "teaching the organisational culture". This entails telling new starters and current employees what the culture ought to be; the more you teach employees what the culture is, the more it becomes a reality. It extends to the type of leadership behaviours required, the values and etiquette expected, and how things should work across the organisation. This will yield massive benefits in retaining scarce- and critical-skilled employees, as they experience the culture they were promised during the attraction and recruitment process. Once the organisational culture has been defined and taught, it is important to start living and modelling it. This involves regularly checking that employees are displaying the required values and etiquette of the organisation.

Leadership plays a pivotal role in influencing a positive culture and so the organisation needs to hold leaders accountable for ensuring that their words, actions and attitudes are aligned with the organisational culture. Finally, it is important to measure culture change. Data can be extremely useful when analysed correctly and therefore it is important to take a measure of culture more than once a year. According to the results, it is recommended that the organisation reward or correct immediately.

To deal with those who deviate from the organisational culture, the organisation should be seen to take immediate corrective and progressive action. For those who model and champion the organisation culture, the organisation should find exciting ways to reward both individual and team contributions to building a better culture. This initiative will increase the odds of creating a more consistent employee experience and act as a retention mechanism for top talent.

6.2.3.3.3 Consistent application of modern retention mechanisms

The study has referred to three modern retention mechanisms, (a) management monitoring, (b) transparent communication and (c) use of data analytics. There were varying responses on how and when the above were implemented. The study recommends that all three be implemented and consistently applied. They are all associated with the type of organisation new-age employees want to work for.

To capitalise on these retention mechanisms, the organisation must ensure it holds its leadership accountable to the highest level, as it should be instrumental in driving the culture shift discussed above. Then, transparent communication ensures employees feel included and valued in the decisions taken by the organisation. With reference to data analytics, the organisation has shifted to Workday, which is a cloud-based service. The organisation must use the system to leverage the data and reports to predict, analyse and consult on all people-related matters, including talent management. This will empower the human capital teams to provide leaders with insights that enable them to make better business and people-related decisions.

6.2.4 Overall recommendation

In the explanation of the key objectives, it was said that the study aimed to provide practical recommendations for the key sub-sections within the talent management process. The study also hoped to recommend how the organisation could improve the current talent management process holistically. The above sections of this chapter thoroughly cover the recommendations stemming from the various sub-sections.

As a final general recommendation to assist the organisation to become and remain a top-ranking employer of choice, it is recommended that there be consistent and visible implementation of the innovative practices outlined above. The organisation needs to allocate time and resources to predicting the organisation's people needs strategically. It must hold the business and human capital teams accountable for ensuring that operationally, key commitments and projects are actually implemented and tracked rigorously.

The study then, recommends that the organisation becomes bolder and more decisive in its talent management practice. This includes making tough decisions when leaders, employees, business, or human capital teams do not deliver on talent management commitments. This will ensure that the practice is no longer seen as a tick box exercise but rather as a key deliverable for everyone who has a people commitment in their performance scorecards.

To end, it is recommended that the organisation continually enhance the employee experience. This should be an accumulation of every stage and event of the employee journey, from the time an employee joins the organisation. The organisation must constantly strive to enhance benefits, the physical environment, growth opportunities and culture. This will make an enormous contribution to attracting, developing, and retaining scarce-skilled talent.

6.3 Conclusion

In outlining the background for the study, the concept of the fourth industrial revolution was introduced. Njuguna and Signe (2020) note that the 4IR provides a massive opportunity for growth. However, it demands dramatic change in how organisations manage their workforce. The authors maintain that in order to transition successfully to the 4IR, the organisations need to invest in cultivating the skills and capabilities required to move into a world of automation and artificial intelligence.

The main aim of this study was to identify gaps in the current talent management process at a financial institution in Cape Town, with specific reference to attracting, developing and retaining newly-identified, scarce-skilled employees. A non-experimental research design was adopted. The primary data collection instrument was a semi-structured interview of questions about what was lacking in the various aspects or sub-sections of the talent management process. The main findings indicated significant discrepancies across all three sub-sections of the talent management process. Regarding attraction, recruitment and onboarding, key discrepancies identified ,included a lack of innovative attraction methods, a lack of brand visibility and appeal to younger generational groups, inadequate infrastructure and limited system functionality, and a lack of investment in the talent acquisition capability.

Then, concerning learning, training and development, the discrepancies included a large reliance on external providers for scarce and critical skills training and a lack of confidence in the internal training and development facilitators to conduct such training. With reference to retention, the key discrepancies identified were a misalignment between how internal and external retention factors are experienced by top talent, based on several controllable variables. In essence, both the intrinsic and extrinsic retention factors require modernisation. In this way, the study provided an answer to the research question: How are the current talent management practices lacking in terms of recruiting, developing and retaining newly identified scarce skilled employees? The study then offered recommendations per sub-section, with a key focus on modern measures that would retain top talent, followed by a holistic recommendation to ensure that the organisation transforms into a digitally-led organisation.

This study is significant as it contributes to the field of study and a body of knowledge. Other organisations that want to ensure they move to a more innovative talent management practice can review the discrepancies identified and check if they appear in their respective organisations. They will be able to implement corrective action at a speedier pace. The recommendations will also serve organisations that aim to shift to a more innovative approach to talent management.

In future research, the topic can be explored further. The world of work is changing constantly and rapidly, so it is important to explore what skills will be required in the future. More importantly, how do South African organisations manage their most important human resources and their employee journeys? It is also recommended that future research focuses on the tangible impact the talent management process has on the organisational deliverables and ultimately the sustainability and profitability of the organisation.

In conclusion, the study aimed to inspire readers to acknowledge the importance of talent management practice and its role in capitalising on 4IR opportunities. Managing top talent and those with scarce and critical skill sets ensures that organisations have an advantage in innovation, digital enhancement and inclusive growth, all of which are essential driving forces in becoming or remaining a forerunner within an industry.

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APPENDICES

APPENDIX A: ETHICAL CLEARANCE CERTIFICATE

Cape Peninsula
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Office of the Chairperson Research Ethics Committee	Faculty: BUSINESS AND MANAGEMENT SCIENCES

At a meeting of the Faculty's Research Ethics Committee on **30 April 2019**, Ethics **Approval** was granted to **Tasneem Abrahams (210084057)** for research activities of **Master of Human Resource Management** at Cape Peninsula University of Technology.

Title of dissertation/thesis/project:	THE DISPARITY BETWEEN CURRENT AND REQUIRED INNOVATIVE TALENT MANAGEMENT STRATEGIES AT A SELECTED INSURANCE COMPANY, CAPE TOWN Lead Researcher/Supervisor: Mr Mgudlwa

Comments:

Decision: Approved

	22 May 2019
Signed: Chairperson: Research Ethics Committee	Date

Clearance Certificate No | FOBREC656

APPENDIX B: REQUEST FOR ORGANISATIONAL CONSENT

**Cape Peninsula
University of Technology**

Faculty of Business and Management Sciences
(M&D Studies)

10 December 2018

Re: Request for Permission to Conduct Research for Masters Studies in Old Mutual Limited, Mutual Park, Pinelands Cape Town.

Dear Human Capital Executive Team

I hereby request permission to conduct a research study at Old Mutual Limited, Mutual Park, and Pinelands Cape Town.

I am employed as a permanent Human Capital Practitioner within the Capability Cluster HC Team.

Currently I am enrolled for Masters in Human Resource Management at Cape Peninsula University of Technology. I am in the process of writing my Master Thesis titled:

The disparity between current and required innovative talent management strategies at Old Mutual Cape Town.

The study aims to identify the gaps in the current talent management process and provide practical recommendations to improve the talent management strategies to recruit, develop and retain newly identified scarce skilled employees.

Should permission be granted, I would like to conduct interviews with relevant Human Capital practitioners, consultants and business partners with the following segments:

- Capability Cluster
- Mass Foundation
- Personal Finance
- Customer Solutions

A purposive sampling technique will be used, allowing the researcher to choose participants based on their crucial knowledge that will likely generate the information required to answer the research questions.

The study will adhere to all ethical rules and governance during the collection and gathering of data, as well as the dissemination of findings. Participants will be assured that their identities will remain anonymous and the information provided will be treated as confidential.

Your approval and support to conduct this study will be greatly appreciated.
Should you provide approval for the study, kindly sign below.

Approved by:

HC Executive- Capability Cluster

16/01/18
Date
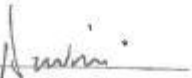
HC Executive- MFC

22/01/2018
Date

HC Executive- PF

Date

HC Executive- Customer Solutions

18·1·18·
Date

APPENDIX C: REQUEST FOR PARTICIPATION: EMAIL INVITE TO INTERVIEW

Dear (insert participant name)

Thank you for agreeing to participate in my masters research study. I have ensured that I have the relevant Old Mutual approvals in place prior to engaging with participants.

My research topic is: The disparity between current and required innovative talent management strategies at a selected insurance company, Cape Town.

I have selected a semi- structured interview guide as my research data collection tool.

In order to ensure this study abides by the ethical considerations, please note the following:

1.   Your consent is required before we start with the interview proceedings.

2.   You are not required to provide your name during the interview process. Your details will remain anonymous

3.   All the responses will be treated with the utmost care and total confidentiality.

4.   Your participation in this research process is voluntary and you may withdraw from the research at any time during the interview process, should you wish to do so.

5.   The interview will be scribed and audio –recorded. Should you disapprove, please inform me.

6.   The study will not cause any physical or emotional harm to participants.

I appreciate you agreeing to participate in my research.

Thank you
Tasneem Abrahams

APPENDIX D: INTERVIEW GUIDE

MASTERS: HUMAN RESOURCE MANAGEMENT

Talent Management Interview Questions

_____

Dear Participant

I am currently registered for my Masters in Human Resource Management and the Cape Peninsula University of Technology.

My research topic is: The disparity between current and required innovative talent management strategies at a selected insurance company, Cape Town. I have selected a semi- structured interview guide as my research data collection tool.

In order to ensure this study abides by the ethical considerations, please note the following:

1. Your consent is required before we start with the interview proceedings
2. You are not required to provide your name during the interview process. Your details will remain anonymous
3. All the responses will be treated with the utmost care and total confidentiality
4. Your participation in this research process is voluntary and you may withdraw from the research at any time during the interview process should you wish to do so
5. The interview will be scribed and audio- recorded. Should you disapprove, please inform me.
6. The study will not cause any physical or emotional harm to participant.

I appreciate you agreeing to participate in my research.

Section A: Generic Biographical Data

Please answer the following biographical information.

Disclosure to participants: This information will be used for analysis purposes only.

Gender

Male		
Female		

First Language

English
Afrikaans
Xhosa
Sotho
Zulu
Other

Employment Category

Permanent	
Fixed Term Contract	
Service Provider	

At which part of the employee life cycle are you most involved

Attraction, Recruitment & Onboarding	
Learning and Development	
Performance Management and Progression	
Motivate and Engage	
Retention and Exit Management	
All of the above	

5. Current job grade

R	
Q	
P	
O	
N	
M	
L	
K	

6. Number of years at the organisation

10 + years	
8 – 10 years	
4-7 years	
0-3 years	

Section B: Attraction, Recruitment and Onboarding

Disclosure to participants: This information will be used to understand what current attraction, recruitment and onboarding strategies are used and how this aligns to modern offerings in the market.

Purpose: To discover if OM is experiencing a people or system related challenge when it comes to attraction, recruitment and onboarding.

Question 1

Explain what skills would be considered scarce skills within your business unit.

Question 2

What attraction methods are used within your business unit?

Question 3

What are your targeted media for talent and passive scarce skilled employees?

Question 4

How visible and attractive is your brand in the market in which you operate?

Question 5

The current recruitment system utilized in OM is Oracle I-Recruit.

Rate your satisfaction level with the current Oracle I-recruitment system

4	Very satisfied	
3	Satisfied	
2	Somewhat Satisfied	
1	Highly dissatisfied	

Question 6

Are you able to use the oracle I-recruitment system to target passive scarce skilled candidates?

Question 7

Does the Oracle I-recruitment system allow for engagement with candidates?

Question 8

Has your business unit utilised artificial intelligence systems to attract and recruit?

Question 9

What type of training has been provided to HR Practitioners in terms of attracting, recruiting and onboarding talent?

Question 10

In your opinion, do you believe the current attraction and recruitment practitioners have the relevant skill set to attract and recruit scarce skilled / talented employees?

Question 11

In your opinion, what do you believe OM should adapt or change in order to attract and recruit scarce skilled/ talent employees in your business unit?

Section C: Learning, Training and Development

Disclosure to participants: This information will be used to understand what current learning, training and development strategies are used and how this aligns to modern offerings in the market.

Purpose: To discover if OM is investing in the correct learning, training and development initiatives to develop and improve scarce skills within the relevant organisation. Also, how does this align to modern offerings in the market?

Question 1

How are learning, training and development needs identified in your business unit?

Question 2

What type of vendors are often used to deliver learning, training and development initiatives?

- Internal Training and Development Department
- External Technical Service Providers
- Informal internal learning/ coaching & mentoring
- External tertiary/ technical institutions

Question 3

Do the business units have the budget allocation / funding necessary to introduce the required learning, training and development?

Question 4

In your opinion, is the internal T & D team equip to train and develop for the newly identified scarce skills?

Question 5

In your opinion, what do you believe OM should introduce or acquire to train and develop newly identified scarce skills?

Section C: Retention

Disclosure to participants: This information will be used to understand how attractive the current retention strategies are and how this and how this aligns to modern offerings in the market.

Purpose: To discover if current OM Retention strategies are sufficient or if OM requires more of an alignment to modern offerings.

Question 1

Based on exit interview feedback, what are the main reason talented and scarce skilled employees leave?

- Lack of growth and promotional opportunities
- Relationship with supervisor/ management
- Lack of career pathing
- Poor implementation of performance management
- Misaligned between organisational and personal goals and vision
- Compensation & Benefits
- Lack of challenging work or rotational opportunities

Question 2

In your opinion, do employees find the total guaranteed package attractive?

Question 3

In your opinion, is the workforce engaged and are they passionate about working for the company?

Question 4

In your opinion, are employees experiencing an encouraging work culture?

Question 5

What current retention strategies are utilised in your business unit.

Question 6

Are you aware of the following modern techniques being utilised in your business area?

- Management monitoring
- HR retention metrics
- Transparent communication

Question 7

What innovative methods would you recommend OM consider to retain talented and scarce skilled employees?

Section D: Business impact

Disclosure to participants: This information will be used to understand what impact the talent management process has had on the organisation.

Purpose: To quantity the impact the current talent management process has had on the business.

Question 1

Has the talent management process added value within your business? Us the rating scale below.

Extremely effective	Moderately effective	Slightly effective	Not effective at all

Question 2

Has any of the following been negatively impacted by the current talent management process?

Financial position
Brand reputation
Time taken to go to market with innovative product or service offerings

Question 3

In your opinion, has the current talent management contributed to the loss of scarce skilled employees?

The End
Thank you for your participation.

APPENDIX E: RESEARCH FINDINGS: RAW DATA

The following appendix provides the raw data received from the participants in the study.

As explained in chapter 3, the interview guide included the following subsections.

Section A: A representation of the generic biographical data of participants. This section included questions around race, gender, number of years with the organisation etc.

Section B: Questions in this section were explicitly aimed at understanding the participants' opinions, views and experiences around aspects relating to the people, process and systems used to facilitate the attraction, recruitment and onboarding of the organisations resources.

Section C: Section C focused on soliciting feedback around the use and implementation of learning, training and development within the organisation.

Section D: This section collected information pertaining to the retention mechanisms used in the organisation and the efficacy thereof.

Section E: The final section included questions that would indicate the impact the talent management process had an on the business.

Answers from each respondent is recorded against the relevant question within the interview guide.

Section A: Generic biographical data

The following table represents the biographical data of the respondents that participated in the semi- structured interview.

The table indicates aspects such as the respondent's gender, first language, employment category, current job grade, number of years in the organisation and an indication of which part of the employee life cycle they are most involved in.

Respondent	Gender	First Language	Employment Category	At which part of the employee life cycle are you most involved	Current job grade	Number of years in the organisation
1	Female	English	Fixed Term Contractor	Attraction, Recruitment and Onboarding	M	0-3 years
2	Female	English	Permanent	All of the above	O	8-10 years
3	Male	Afrikaans	Permanent	Learning and Development	N	8-10 years
4	Female	Xhosa	Fixed Term Contractor	Attraction, Recruitment and Onboarding	M	0-3 years
5	Female	English	Permanent	All of the above	N	4-7 years
6	Female	English	Fixed Term Contractor	Attraction, Recruitment and Onboarding	M	0-3 years

7	Female	Afrikaans	Fixed Term Contractor	All of the above	O	0-3 years
8	Female	Zulu	Fixed Term Contractor	Attraction, Recruitment and Onboarding	M	0-3 years
9	Female	English	Permanent	All of the above	N	10+ years
10	Female	Sotho	Permanent	Attraction, Recruitment and Onboarding	M	10+ years
11	Female	English	Permanent	All of the above	O	0-3 years
12	Female	English	Permanent	Learning and Development	M	0-3 years
13	Female	Afrikaans	Permanent	Learning and Development	N	10+ years
14	Female	English	Permanent	All of the above	O	10+ years
15	Female	English	Permanent	Learning and Development	L	4-7 years
16	Female	English	Permanent	All of the above	O	10+ years
17	Female	English	Permanent	Learning and Development	M	10+ years
18	Female	English	Permanent	All of the above	O	10+ years
19	Male	Other	Permanent	All of the above	O	10+ years
20	Female	English	Permanent	Learning and Development	N	10+ years
21	Female	English	Permanent	All of the above	O	10+ years
22	Female	English	Permanent	Learning and Development	N	10+ years
23	Female	English	Permanent	All of the Above	O	10+ years
24	Female	English	Permanent	Learning and Development	O	10+ years
25	Male	Xhosa	Permanent	All of the Above	O	10+ years
26	Female	English	Permanent	All of the Above	O	8-10 years
27	Female	English	Permanent	Learning and Development	N	10+ years
28	Female	English	Permanent	Attraction, Recruitment and Onboarding	L	0-3 years
29	Female	English	Permanent	All of the Above	O	4-7 years
30	Female	Xhosa	Permanent	All of the Above	O	10 + years
31	Female	English	Permanent	Attraction, Recruitment and Onboarding	L	4-7 years
32	Female	English	Permanent	All of the Above	O	4-7 years
33	Female	English	Permanent	All of the Above	O	4-7 years

| 34 | Male | Afrikaans | Permanent | All of the Above | O | 10+ years |

What follows next is the respondents to answers to question pertaining to Section B of the semi – structured interview.

Section B: Attraction, recruitment and onboarding

The following section provides the answers of the respondents to section B of the interview guide.

Questions within this section were focused on the current attraction, recruitment and onboarding processes at the relevant organisation.

The purpose of these questions was to discover if the organisation was experiencing a people, process or system related challenge when it comes to attraction, recruitment and onboarding.

Question 1:
Explain what skills would be considered as scarce skills within your business unit.
The table indicates the skill sets mentioned by the research participants. It is group according to scarce skill categories.

Digital and Data related
Respondent 1: "Well I can speak mostly to IT and Digital and Data. So it would be developers and programmers across all platforms and languages. In fact, the full SDLC cycle and all roles. In digital and Data it would be data analytics, data science and UX and UI.
Within the greater Old Mutual, would be the actuaries and the specialized fund management skill set."
Respondent 4 : "The scarcest skills sit in the digital space, especially the digital architects and digital design people."
Respondent 5: "So because we are in the digital and data business, it would be like your UX and UI designers"
Respondent 6 :"Within the IT business, it would be the developers. Specifically, with .NET skills."
Respondent 8: "It's data science and data analytics which is quite big at the moment."
Respondent 10: "It would mostly be senior digital roles"
Respondent 13: "At the moment with digital transformation, it's any skills that are critical to deploy the digital customer experience."
Respondent 16: "People that are truly agile in terms of Scrum masters within the digital environment."
Respondent 34: "Also, data management, so data scientist and data analytics is a big scarce skill we always looking for."
IT Related
Respondent 2: "So, in my business, it's in the IT space. So things like agile and cloud skills are scarce."
Respondent 1: "IT architecture is also a large scarce skill set. Also a new term, it's called software engineering. The old term was known as architect but now we moving into software engineering. It's basically developing applications in the cloud environment. "
Respondent 3: "Really, it's any skill that has anything to do with technology, anything to do with innovation really"
Respondent 9: "From an IT perspective, it's your developers. Just recently, with working with a line manager in order to get EE developers, like .net or SQL. It's proven to be a challenge."
Respondent 11: "New capabilities that we are rolling out such as DevOps and the engineering capability."
Sales and Management
Respondent 12 : "Actuarial and Engineering skills are the top two at the moment."
Respondent 14: "Actuarial skills are rather scarce in this business unit"
Respondent 15: "We really struggle with recruiting for more senior roles, really the strategic individuals who will serve on our Executive boards."
Respondent 19: "Our business is a sales business, so in this business it is around finding that rare mix of a leader that is able to drive sales and people manage."
Respondent 21: "Also, another big item is our leadership potential in the business. We really do struggle. So we struggle to build internal leadership pipeline."
Respondent 22: "We struggle to find the right skills in the leadership sales roles."
Respondent 23 "So in the customer solutions business, definitely the actuarial skills"
Respondent 28: "So finding skilled focused and financial advisors are definitely the skill we consider scarce."
Respondent 29: "So I support a sales business, so our scarce skills would be fit and proper financial advisors and sales managers
Respondent 30: "General Management and EE leaderships roles are really scarce within OM."
Respondent 31: "Senior sales managers"

Respondent 32 : "So when we lose an executive member it becomes really hard to fill that role, no matter how much succession planning you do and this is just because these employees are so tenured, with years of experience and IP."
Respondent 33: "In the customer solutions space, it has and always will be the actuarial roles."
Behavioral skills
Respondent 7 : "Those with systems process thinking skills are identified as critical."
Respondent 17: "It would be soft skills like problem solving and system thinking skills."
Respondent 18: "It's more about new skills and capabilities that it's going to help us into the future"
Respondent 20: "People with problem solving skills, critical thinking, and creative thinking which leads to innovation."
Respondent 24 : "We struggle to find individuals that are able to apply critical thinking, logical thinking and mathematical application in the sales environment."
Respondent 25: "We struggling to find people that are future fit. That really is able to move with the digital transformation of the business."
Respondent 26,: "A very big new one which is behavioural economics"
Respondent 27: "Then also behavioural skills for the future, such as critical thinking, design thinking and agility."
Respondent 33: "In all of the spaces, what we have struggled with is getting the correct demographic or profile or employee. So we struggle to find qualified and suitable EE candidates for the roles."

Question 2:
What attraction methods are used within your business unit?
The following table provides an overview of the participants answers in terms of the platforms utilised
and then the discrepancies experienced with the current methods.

Platforms utilized
Respondent 1: "Old Mutual only uses Linkedin. Even with our Linkedin though, we trying to increase our presence on that platform."
Respondent 2: "So right now when we get an opportunity we advertised on our i-recruit system. Then, there is also the consulting houses, reaching out to them"
Respondent 3 : "Well, I know that there's a lot of the use of LinkedIn."
Respondent 4: LinkedIn has become a huge role. Really the standard process because our internal oracle site can be job wrapped to other sites."
Respondent 5: "So we use LinkedIn."
Respondent 6: "Currently, it's just LinkedIn.."
Respondent 7: "So digital would be Linkedin and recruitment portal would be oracle."
Respondent 8: "We use different sourcing channels. For the majority, we use our e-recruitment system which is oracle."
Respondent 9: "It would be LinkedIn"
Respondent 15 : "So it's predominantly the oracle I recruit system. Then we have our Talent Acquisition specialist that specifically head hunt people, by looking at their LinkedIn profiles."
Respondent 16: "We do searches on LinkedIn."
Respondent 17: They have a lot of programs which attracts youngsters with those skills."
Respondent 18: "We go to agencies that can recruit for this roles."
Respondent 19: " We predominately rely on the internal processes."
Respondent 20: "The internal oracle system."
Respondent 23: "For the usual roles, we use oracle i-recruitment. For scarce skills, which is the majority of roles, it is networking or referrals."
Respondent 24: "We have used portals like Linkedin to actually attract those in similar roles at competitors and teach them our products and systems."
Respondent 25: "We use oracle and Linkedin."
Respondent 26: "With the tech stuff, we have created a graduate programme to bring in people to build tech skill sets."
Respondent 29: "Like direct sourcing and LinkedIn specifically to find established financial advisors and their sales skill set and clients."
Respondent 30: "We would use oracle, Linkedin and networking."
Respondent 31: "For agents predominantly, we make use of oracle I recruitment"
Respondent 32 : "So we have, uhm what do I call them, a team of administrators that source via the phone."
Respondent 34: "So for actuarial, there is a specialized unit called actuarial recruitment and development. Yeah, so they play a big role in supporting us with the activities that attracts the actuaries."

Discrepancies experienced
Respondent 2 : "I don't think we are not as active as what we should be."
Respondent 5: "So the referrals, it's not formalised."
Respondent 10: "Yeah, we haven't done anything different. Anything wild. It's pretty standard."
Respondent 11: "We're very reactive, we post an ad on social media or oracle and then wait for applicants. I think we need to use more non-traditional attraction methods."
Respondent 12: " I really don't know of anything, other than the normal portals"
Respondent 13: "We struggle with attracting those specialist digital type skills because we don't show what we doing that's interesting, especially the interesting IT or digital aspects."
Respondent 14: "Pretty much the same thing everyone does."
Respondent 21: "In our space we are a little bit limited in terms of how we find people and that would be one of our biggest issues as well."
Respondent 22: " I think we're still very old school in the way of thinking and we need to go with the more a more vigorous approach."
Respondent 27: "I don't think they use social media enough, things like Facebook to actually promote the kind of things that we do that will attract talent."
Respondent 28 : "So we don't have portals due to budget constraints. We used to have portals like Indeed, but that is no longer around."
Respondent 32: I'm not aware of anything that recruitment is doing that is over and above."
Respondent 33: "We have used the standard process of placing an advisement on i-recruitment."

Question 3:
What are your targeted media for talent and passive scarce skilled employees?
The following table provides a view of the participants answers in terms of the target platforms utilised.

Use of Linkedin
Respondent 1: "Purely Linkedin. No other platforms and this is a huge gap."
Respondent 5: "LinkedIn has been successful."
Respondent 8: "From my side, I approach those candidates. I look for them on Linkedin."
Respondent 12: "There's Linkedin."
Respondent 15: "Mostly Linkedin and Oracle –irecruit."
Respondent 17: "Only Linkedin."
Respondent 21: " LinkedIn licence and using that to reach out to those people, that's about it."
Respondent 23: "It's about connecting with them via Linkedin and checking their interest in what we have to offer."
Respondent 25: " Mostly Linkedin for passive candidates."
Respondent 26: "Right now, we actively use Linkedin to target our passive candidates."
Respondent 29: " The Linkedin is mainly used for direct targeting."
"Respondent 31: "We would use Linkedin, we have one recruiter profile for the business."
"Respondent 32: "Again, this would be Linkedin. There isn't anything above this which is quite upsetting."
Respondent 33: "For passive candidates, we have gone to the back end of LinkedIn to look for candidates."
Respondent 34: "We have found that sourcing for passive candidate on Linkedin is much better than just a normal advert on your oracle i-recruit website."

Innovative methods
Respondent 2: "There are some new things that have been happening in the business. The innovation programs, like the AI initiative that Old Mutual sponsored, getting involved with programmes like that ensures that Old Mutual is exploring new ways of doing things."
Respondent 10: "So what's been working of late is referrals. When I contract with hiring managers, I tell them I need at least three referrals, people from their network."
Respondent 16: "The Chief Digital and data officer has a little black book people in the industry he keeps track of."

No targeted media used
Respondent 6: "Nothing really. We are really just using our brand as Old Mutual to attract those people."
Respondent 10: "I think we are terrible at it; we don't use anything really."
Respondent 13: "We need to do more to go find them, we not using anything alluring."
Respondent 18: "Not much really, I think the organisation is now evolving and wanting to use social media platforms more but I don't think we quite there yet."
Respondent 22: "Nothing really, we still very reactive really. Other companies are not scared to poach Old Mutual top talent. We are still very conservative in our role."
Respondent 27: "We do this very inconsistently."

Question 4:

How visible and attractive is your brand in the market within which you operate?

The below tables indicates respondents answers on if and when the brand is considered viable and attractive in market.

Very visible and attractive
Respondent 7: "I think in the financial services industry itself, the original OM brand is quite an astute brand."
Respondent 8: "Our brand is prestige in the market. When you speak of insurance company. It's like your legacy kind of environment. Really corporate"
Respondent 13: "In the past it was very much because the brand has been around for 150 years already, the brand is viewed as trustworthy, a brand that secures employment and customer investments."
Respondent 14: "The brand is trusted by many."
Respondent 16: "Everyone knows the brand is strong and it's been there for years and lots of people work there for years."
Respondent 17: "From a legacy point of view it's very attractive."
Respondent 19: "It's a well-established brand in the market. People trust the brand"
Respondent 24: "Old Mutual operates at a very high level. They know what we offer and how the stringent our processes are and how we comply. So they understand the quality of sales person we produce at Old Mutual."
Respondent 25: "The brand is rather attractive, it is long standing so people see it as trustworthy, a brand they know and recognise."
Respondent 32: "I think that we have a reputational standing in the market that is kind of attractive."
Respondent 33: "They see the brand as strong and stable."
Respondent 34: "Old Mutual is always featured as a leader in the financial services arena. So I think we have good brand visibility."

Not visible and attractive
Respondent 1: "From an IT and Digital and Data perspective, its not visible."
Respondent 2: "We trying to get the young and upcoming guys and I don't think our brand is well known with them. We are associated with old world and not the future."
Respondent 4: "In terms of a talent brand name, I feel like we pretty much lacking. We don't advertise or portray ourselves as the employer of choice."
Respondent 5: "It's really not, I know they're working on it now. There is a lot of work that we still need to do."
Respondent 6: "In order for our brand to be attractive to the younger, new aged developers and those kinds. We need to actually use Linkedin and showcase what it is we actually doing. So if we using block chain, make a video and actually show that."
Respondent 7: "Our brand is not there yet, where the brand speaks for itself with that market so we need."
Respondent 11: It's not visible, like I said, in the forums where the scarce skills people operate. I think we almost need to do a piece of work to understand where do these techies live? And how do we reach out to them. I think it's a bit of learning to understand the new generation as well."
Respondent 13: "With the industrial revolution going around, we need to re-invent the brand faster."
Respondent 20: "I do believe our brand needs a better focus on attracting millennials."
Respondent 22: "There is a lot more that we can do to stay visible out there and to keep ourselves in touch with the market and be able to attract the top talent out there."
Respondent 26: "The brand is not necessarily attractive to those with scarce skills."
Respondent 27: "No, I don't think it is attractive for the skills that we want. Our brand is still very much so insurance and finance based."

Question 5:

The current recruitment system utilised in OM is Oracle I-Recruit. Rate your satisfaction level with the current Oracle I-recruitment system.

The respondents were given a rating scale, the below table depicts the responses.

Highly dissatisfied (1)
Respondent 1: "It manages the recruitment process but there is nothing proactive about the system."
Respondent 2: "I feel like for a recruiter the system is very inflexible."
Respondent 4: "It is not user friendly, especially for the candidate experience as well."
Respondent 8: "The system always freezes which makes it difficult for candidates to apply."
Respondent 9: "The shortlisting process is so long; I think the search engine at that time was already a problem. I believe it still is. It was very reactive."
Respondent 11:" The system lacks MIS reporting that is often needed and useful."
Respondent 14: "It has been the same system for years, with the same glitches year in and year out."
Respondent 18: "So the system is definitely not easy to engage with, it requires a lot of manual prompting."
Respondent 19: "The system is very inflexible."

Respondent 21: *"The system is complicated and it doesn't necessarily give you what you want."*
Respondent 26: *"It is a very archaic system."*
Respondent 28: *"The system is a very outdated system and so slow."*
Respondent 29: *" The system is not great, we try and avoid it at all cost and use external portals."*
Respondent 30: *"If you don't regularly work with the tool, it is not easy to navigate."*
Respondent 34: *"I find it a bit cumbersome and I find it not very user friendly."*

Somewhat Satisfied (2)
Respondent 3: *" I guess, it covers the basics, that's about it."*
Respondent 7: The system is very temperamental and may be viewed as limiting."
Respondent 10: *"I guess it covers the bare basics."*
Respondent 15: *"The system is really slow and it's very manual, everything needs to be done individually."*
Respondent 16: *"I wouldn't say completely satisfied with the system, but it is the known in the Old Mutual context. It just about gives you what you require."*
Respondent 23: *"Well there isn't an alternative to the system just yet, so we have to be satisfied with what we have in the meantime."*
Respondent 24: *" I think the system is okay, it does the basics."*
Respondent 27: *" It's not user friendly and it's not intuitive."*
Respondent 31: *"I know a lot of applicants have also been complaining about the system."*

Satisfied (3)
No respondent made use of this category

Very satisfied (4)
No respondent made use of this category

Question 6:

Are you able to use the oracle I-recruitment system to target passive scarce skilled candidates?

The table below indicates feedback from participants in response to the above.

Yes
No respondents indicated yes to the question above.

No
Respondent 1: *"The system is a completely re-active system. Used for the traditional reactive recruitment. Definitely does not allow for proactive sourcing."*
Respondent 4: *"No, so it doesn't allow us to target them. We would need to ask if the specialist can contact them via Linkedin messaging"*
Respondent 5: *"No, it was designed to be like an applicant tracking system thing. Not necessarily to interact with like passive candidates."*
Respondent 8: *"No, like I explained the system has lots of glitches so we can't utilise it fully to engage with candidates."*
Respondent 9: *"No, not at all, the recruiter would need to do it manually"*
Respondent 10: *"No, I have searched the database but it is not user friendly. The system doesn't pick up on duplication."*
Respondent 11: *"No, not really. Recruiters would do that off the system via email, calls, whatsapps etc."*
Respondent 12: *"No, the advertisements and process is already so complicated. It would be even more difficult to get people that weren't looking to be a part of a process like that."*
Respondent 15: *" No, it's a very standard system."*
Respondent 17: *" No, even for those that actively are looking, the system isn't that easy to navigate"*
Respondent 19: *"No, not really. You can't go out and find who sits in the market with those skills, much less contact them via the system."*
Respondent 21: *"No, the system is not simple, it's not easy to use and to navigate around. I think we could make it look a lot sexier and be more simple, just plain easy and more attractive."*
Respondent 23: *"No, not at all. The passive candidates that have scarce skills in the financial industry are probably working privately or for a competitor so there is no way we can contact them via that system."*
Respondent 26: *"No, it is a really old system. Also, aesthetically, it doesn't look very nice, so one would not want to engage with passive candidates with it."*
Respondent 27: *"No, because the system is not user friendly."*
Respondent 28: *"So no, we can't use oracle for those passive candidates. We just watch our potential recruits being recruited by competitors on social media because that's actually where the millennial top talent is."*
Respondent 31: *" No, the recruiters or HCBP would reach out via Linkedin or email."*
Respondent 32: *"No, we would use Linkedin."*
Respondent 34: *"No, I have played on the system and I couldn't find that capability."*

Question 7:
Does the Oracle I-recruitment system allow for engagement with candidates?
The below tables indicates responses question to the above.

Yes
No respondents indicated yes to the question above.

No
Respondent 2: "No, the more meaningful engagement happens via phone calls and emails."   *Respondent 5: "Nope, only via emails and calls."*   *Respondent 7: "No, most of the time it's the use of whatsapp and email to get in contact with candidates."*   *Respondent 8: "No, there is too many technical issues with the system."*   *Respondent 10: "No, it's work outside of the system. I use emails most of the time."*   *Respondent 13: " No, most of the communication is done via emails and calls."*   *Respondent 14: "No, the recruiters usually use emails, calls and whatsapp to engage with candidates."*   *Respondent 16: " No, we generally recruit for very scarce skills, they prefer a quick call or whatsapp to keep them in the loop."*   *Respondent 17: " No, again, the system is slow so it doesn't give regularly updates."*   *Respondent 19: "No, that's done via calls and emails."*   *Respondent 22: "No, the current infrastructure doesn't work quick enough, fast enough or is not digitally enabled to give us an opportunity to go out there and engage with candidates."*   *Respondent 25: "Nah, not really. It can send standard automated responses but for other things it is not very user friendly."*   *Respondent 27: "No, not really, as because the system is not user friendly most candidates don't know how to use the full system to engage."*   *Respondent 28: "No, using the system to communicate to candidates just doesn't work. The system is so outdated and slow so we wouldn't really use it to engage with candidates."*   *Respondent 30:" No, I believe the system is extremely problematic when it comes to sending out mass communication or updating process statuses."*   *Respondent 32: No, like I said it is so glitch. The system is not user friendly and its look and feel is extremely dated as well."*

Question 8:
Has your business unit utilised artificial intelligence systems to attract and recruit?
The below tables indicates responses question to the above.

Yes
No respondents indicated yes to the question above.

No
Respondent 1: "So no. I think from an innovation perspective there is work being done, great work happening within the business. Specifically, within the business and operations side, but I don't think us as a HR capability exploits our current resources and research enough internally."   *Respondent 3: "You know, it's something I've heard people talk about around the business, but I don't know of anything specifically happening or being used within HR."*   *Respondent 5: "No, I am not aware at all of anything."*   *Respondent 8: "No, not with oracle. It doesn't allow us to."*   *Respondent 10: "No, we haven't used anything in our business unit but when I was doing our graduate recruitment, I picked up that the Human Capital centre has quite a cool system, called Leaply."*   *Respondent 12: "No, I don't know of any of the HR teams making use of AI in their processes."*   *Respondent 14: "Maybe in the broader business like digital and data but nah I am not aware of anything within recruitment."*   *Respondent 15: "In the broader operations areas, I believe they are focusing on such automation, but no I am not aware of anything within any of our recruitment team."*   *Respondent 18: "No, they have not. Although I definitely think it's something we should have invested in a long time ago."*   *Respondent 20: "No, I am not aware of us using it. It's definitely a missed opportunity."*   *Respondent 23: "We have used Linkedin , but nothing else unconventional."*   *Respondent 26: "No, we have not. With the new Workday system coming, it has the talent acquisition module which is going to be a lot easier to track applicants. However, right now we don't have anything."*   *Respondent 28: "We tried something called hazey. For some reason, it just never happened or materialised."*

Respondent 29: "The business has tried something called Hazey, although there were a lot of technical issues. The team started testing, but it wasn't giving the correct responses." *Respondent 31: "No, there is nothing I am aware of. All of our systems are still very manual."*

Question 9:

What type of training has been provided to HR Practitioners in terms of attracting, recruiting and onboarding talent?

The table below indicates what type of training respondents received. In addition, it indicates what training is not being received.

LinkedIn and on the job training
Respondent 1: "For attracting talent we use very little apart from Linkedin. In terms of training, we attended sessions internally." *Respondent 2: "I can't think of formal training. When new people join, they get on the job training."* *Respondent 3: " I only know of the standard in house training everyone gets, sort of on the job training when you get to the particular HR team."* *Respondent 6: "There's LinkedIn training and learning. Most of the time with the system or how we do things, we just literally train ourselves."* *Respondent 7: "I am aware that there has been some upskilling around LinkedIn awareness and the journey with Work day."* *Respondent 8: "Nothing really. They will give you that initial training for you to understand the processes and the systems but that's it. It's just the internal training that is offered, nothing more."* *Respondent 15: "I know last year or two years back there was knowledge base training, focused on people understanding the process. However, there hasn't been specific training recently around the different methods and tools that can be utilised."* *Respondent 19: "It is only the training on the normal internal process to be followed."* *Respondent 20: "In terms of my experience with the whole onboarding practice and program that I've developed, it was very much taking it from an OM perspective."* *Respondent 24: "It's the standard training that the recruitment team would get."* *Respondent 26: "So we have just ran Linkedin Training, for HC Community and the line managers in the business which was successful and new for them to learn how to use their personal profiles to attract potential hires in the market."* *Respondent 28: "Honestly, it's on the job training."* *Respondent 29: "The training they get is standard though, around the recruitment process and governance and how to load things on the system."* *Respondent 32: "It hasn't been the new stuff in the market, everything is still aligned to the very traditional approach to recruitment."* *Respondent 33: "We always have this ongoing internal Linkedin training."*
Training not received
Respondent 5: "Nothing is really offered. I don't think we've put in a lot of work when it comes to talent acquisition. *Respondent 10: "The closest thing that was really future fit, was a workshop run by the Human Capital Centre towards end of 2019, where they spoke about how to approach human capital in the new world of work, but it was really futuristic and not really practical or applied to talent acquisition just yet."* *Respondent 11: "None, I don't think that they attend enough external events or training to be able to reference how things is happening outside in the market."* *Respondent 12: "Nothing really. I think based on the new world of work, the team can't really wait for the organisation to do all the training. There needs to be self-learning as well. However, from an organisation perspective, I am just aware of the Linkedin campaign that shows people the functionality of the system and how to use it."* *Respondent 13: "We always hear other people in industry are doing cutting edge stuff but our team doesn't get the first-hand experience or training of how it's done."* *Respondent 14: "Nothing really, there has been some Linkedin awareness training. Other than that, they keep referring to this New ways of work, yet the team hasn't been upskilled in how to recruit in that new world."* *Respondent 18: "Nothing really concreate yet. I believe we are evolving, trying to understand these new scarce skills in the market and how it affects the general way we attract, recruit and onboard."* *Respondent 23: "Our structures are way too rigid for proper training and experience. We haven't had any new training on how competitors are doing it though."* *Respondent 26: "I do believe the team can benefit more from more external training though."* *Respondent 27: "Basic Linkedin awareness training has been rolled out. I don't think there is enough emphasis on the whole new ways of work though."*

Question 10:

In your opinion, do you believe the current attraction and recruitment practitioners have the relevant skills set to attract and recruit scarce skilled / talented employees?

The below table indicates the responses in relation to the question above.

Yes , they have the required skill set
Respondent 4: I think to a certain degree because of our own previous background and experience, we can yes. I think as a company we could be doing more to upskill the current employees. Things like networking events and conferences isn't opportunities or training that's provided."
Respondent 7: "Yes, I believe the recruiters or talent advisors have the ability and potential. However, the shift now is that the business comes to the talent advisor team with a dual request. They bring business as usual requests like six senior administrator or 10 students but at the same time they make a request for UX designers. So like yeah, I think the recruiters have the capability but it's about prioritising clients and business needs in those high volume's."
Respondent 8: "Sigh, yes but with the high volumes that we're dealing with, it is a challenge to do proactive sourcing."
Respondent 9:" I would say yes but the volumes are a problem. I think from a capacity perspective, I still can't understand how we want the recruitment team to do more, with less."
Respondent 11: "I think that they could benefit from going on further training to help them move with the times. So there's a lot of new recruitment methods out the there. It's by no fault of them that are not getting exposure to it."
Respondent 14: "Yes, I think they competent. I think they can benefit from training, we all would."
Respondent 15: "Thus far I think we have appointed the right people with the right skills in our spaces but there is definitely more development required around how to do things more efficiently."
Respondent 16: " I don't think it's a lack of skills. I think it's lack of time and capacity because to do that you need to work differently. They need to work in a proactive manner and right now their role and structure allows them only to be reactive. I don't think necessarily, it's the profile of individuals."
Respondent 18: "I think they have the right skills. The problem is, is that business has not actually identified what their critical skills are and informed the team on the urgency for it. I also don't think they have received the relevant training to be able to offer this service to the business, so I think it's unfair to say they are not competent when we haven't outlined the change we expect to see as business."
Respondent 20: "The team has the appropriate skills but I think they just lack some of the newer experience within the market."
Respondent 32: "From a competency perspective I'm sure that they can recruit and recruit well. *I do think they do not have enough resources though or the right resources. When I say resources I'm speaking about data platforms or system accesses. Also just not enough people to carry the standard traditional recruitment and then the new type of sourcing."*
Respondent 33: "First, in our space, we don't have exactly what the other segments have, like those talent acquisition specialists. So the Human capital business partners are almost playing a dual role and doubling up as that talent acquisitions specialist. So I think it is a capacity issue from their end, more than a skill issue. Second, I don't think the recruiters have actually been given a mandate to go as far as proactive sourcing. There hasn't been an actual expectation conversation with them to say the organisation expects them to be able to play the role of a recruitment agency actually. must say though; I have seen advancements in the way the team recruits."
No, they do not have the required skill set
Respondent 1: "No. I don't think so. It is completely reactive and traditional recruitment done by the team. The team hasn't even got the training required to gain the new type of skills to recruit in this day and age."
Respondent 2: "We position the recruiter role as- you advertise a role and you place a person. So that's what we telling them as an organisation to do. I think we need to re-brand the role, as you are 50% marketer and 50% engaging with networks."
Respondent 3: "No, I don't think so.   I think all of the HR practitioners really have a skill that they have always had. We don't get the training on the new tools or the training about how to think differently about using these new tools in the workplace."
Respondent 6: "No, not just yet. I think what is lacking is the change management of the teams actually understanding where the organisation is heading with talent management. There hasn't been clear direction around what the new world looks like for us."
Respondent 10: "No, definitely not. I think it's purely because of capacity. We expected to do the future stuff but there is just so much BAU things to do."
Respondent 21: "No, the recruitment team lack capacity and knowledge to recruit in this new world for the skills we struggle with."
Respondent 24: "For the basics yes. For newer skills or competencies, no."

Respondent 26: "Not quite yet, they have great potential though. Also, I think there is definitely an opportunity to upskill, especially now with Workday coming." *Respondent 28: "It might be because we haven't got formal training but I don't feel like we have the skills to find those really hard skills to find in market."*

Unsure, if they have the required skill set
Respondent 5: "I'm struggling to say yes or no. The recruiter role is still just viewed as you bring in the individual and then your role ends. We have yet to build the culture of the whole HR function working together." *Respondent 12: "I don't work close enough with the guys to be able to answer that. Although I think as a broader HR team we all need upskilling around this topic."*

Question 11:

In your opinion, what do you believe OM should adapt or change in order to attract and recruit scarce skilled/ talented employees in your business unit?

The respondents provided the following suggestions as tabled below.

Improvement suggestions
Respondent 1 "A lot of our marketing material speaks to re positioning our brand as a Fin-tech company." Also, look with the workday implementation. I think the complexity of our processes might hamper the efficiency of the system and that is something we need to look at." *Respondent 2: "I think we need to become more relevant as an employer of choice. I think we need to start appealing to where these scarce skill people are hanging out"* *Respondent 3: "Old Mutual needs to change their mind set around attracting top talent and realise that ultimately they are up against a whole lot of different organisations trying to attract the same pool of people."* *Respondent 4: "We need to create a better presence on social media, especially for those passive Candidates."* *Respondent 5: "Push to show the company as an employer of choice."* *Respondent 6: Respondent 6: "We need to go out there and attend events and conferences and actively look for the best people out there."* *Respondent 7: "I believe with Work day coming, we will have the necessary infrastructure in place to find the best talent. We need to use our talent process better."* *Respondent 8: "Of course with the coming of the Workday , I'm pretty sure it should create efficiencies."* *Respondent 9: "The IT Infrastructure needs to change.We need to be able to use Skype, Zoom and Whatsapp to engage with and interview our candidates."* *Respondent 11: "I would suggest that Old Mutual invests in its talent acquisition team and allow and pay for them to attend industry and upcoming events where they are able to network and meet others within the broader market that are looking for similar or the same scarce skill employees."* *Respondent 13: "We need to shift the branding so that the organisation can be viewed as modern."* *Respondent 15: "We need to become more modern with our offerings to become attractive to key people within the market."* *Respondent 19: "Also, the recruitment team needs to get to know the actual client better, they usually get their instructions from the HCBPs. I would want to see a shift where the recruitment teams or head of the recruitment is actually apart of business meetings where the client's needs are described."* *Respondent 22: "We need to definitely be more digitally savvy. We need to equip our recruiters with digitally skills. We need to ensure that those individuals that are responsible for talent acquisitions actually have the skills, competencies and means to go out into the digital world and find what we are looking for."* *Respondent 25: "We need to showcase why we are an employer of choice, actually show the exciting things we are doing."* *Respondent 27: "We need to get better technology, technology to make us efficient and faster."* *Respondent 29: "We need to look at how we can refresh our technology we use."* *Respondent 32: "We also need to create a better employee onboarding experience. We need some form of digital incorporated into our recruitment process."* *Respondent 34: The other thing is transformation. We need to transform and find more EE candidates for our roles.*

Subsequently, section C follows which focuses respondents answers on learning, training and development at the relevant organisation.

Section C: Learning, training and development

The following section provides the answers of the respondents to section C of the interview guide.

This section focused on the current learning, training and development practice at the relevant organisation.

The purpose of these questions was to discover how the organisation identifies learning needs and if the organisation was investing in the correct learning, training and development initiatives to develop and improve scarce skills within the relevant organisation.

Question 1:
How are learning, training and development needs identified in your business unit?
The table below the process explained by respondents

Process
Respondent 1: "Its understanding where we are at and where we want to get with our technology stacks. I'll give you a basic example, with the workday system landing, we identify that a new system is landing and therefore our staff need the required training and so that is the training we will offer."
Respondent 2: "I'll give you a basic example, with the workday system landing, we identify that a new system is landing and therefore our staff need the required training and so that is the training we will offer."
Respondent 3: "We look at where is the business going in line with the company strategy and then complete a needs analysis for the particular business unit."
Respondent 4: "The Learning Centre would be approached to say we need assistance with training with these kind of roles and this is the product that we're selling."
Respondent 6: "If I think of the Bizagi skills set, it's a Canadian system and we use it. We struggle so badly to find the right skills. I then asked the line manager, why are we not training up our own internal people. The line manager, myself and the human capital business partner then met and discussed building a pipeline. A learning consultant was then also brought onto the project and now they are building internal pipeline for the capability. So it's a mixture of people working together, identifying a shortage or lack of skill and then trying to train for the skill within or get it externally."
Respondent 7: "Depending on the nature of the business, the training would be very specific product related training. Also system training, depending on what system knowledge is required to do their jobs."
Respondent 8: "It has to be in line with the objectives of the area and the strategy of that particular area."
Respondent 9: "It is more product training or systems training. If a new product was launched to a new system that's how the customer service business unit would identify what training those people would need."
Respondent 11: "So typically what we would do is the WSP (Workplace Skills Plan) and at the ATR (Annual Training Report). So ideally, the business units decide what are the newly identified scarce skills they want to invest in based on business need or requirement. As HC, we then also we influence that by giving input."
Respondent 12: "So there are two different ways. One, the training or learning need will be brought forward form the business. The second is when the learning consultants meet with the business and the operations managers and they discuss what the learning plans and development plans are for their teams."
Respondent 15: "So we have engagements with the senior leaders in the space. We would discuss; what development programs is needed to set the business up for success."
Respondent 16: "We use environmental analysis to determine what type of soft skill training to invest in, we watch people interact with their teams, seeing them in meetings, how they interact, and then we'll come up with a view and a plan that we will present back to the management team for them to sign off on it, and then from there, in that proposal will determine what are the type of skills we will buy borrow and build."
Respondent 17: "As a learning consultant, we go to the operations manager and the team leaders who then tell us what their learning needs are or what the focus from a learning point of view is. We then offer those learning interventions."
Respondent 18: "When the organisation has got new systems being implemented or new capabilities being built, then it will give rise to a development need."
Respondent 19: "So the HCBP sits very close with the area heads and provincial managers and they decide based on the needs to the business, what training initiatives should be rolled out to the teams. We are a sales business, if regional sales managers are not performing, key training initiatives are implemented to address sales performance immediately."
Respondent 20: "So it's definitely through consultation and then also being present in Business

Operations meetings. The learning manager and learning consultant, consult with the business unit leaders and general managers of the areas."

Respondent 22: "It terms of the actual engagement with the business, it can either be my manager, who is a learning manager or as learning consultants we get assigned to a particular project or program. We would look whether It stemmed from a performance or legislation need. The person responsible for the project is always responsible for assessing whether the business objective and learning objective has been met."

Respondent 23: "So in our world it is slightly different. Most of the individuals we have in our business, are professional. So their continuous development from a professions perspective is a huge part of all the development set out for them. Then, there are also profession agnostic skills, like agile that we feel all of our leaders could benefit from so we will lead an initiative like that as well."

Respondent 24: "We've got different programs and it's based on sharpening the competencies required to do particular roles within the business. The modules are either covered externally or internally. We will discuss this and agree the best approach with the business."

Respondent 25: "The HC teams together with the central learning teams conduct needs analysis across the business and then propose what must be done to close the gaps or improve performance."

Respondent 26: "Line managers would be approached by the learning teams and HCBP's to ask what would be the yearly training needs would be."

Respondent 27: "So there is engagement with the business but once again not consistent around who does that engagement. In some areas it would be the learning consultant, other areas it would be the performance consultants and in other areas it would be the HCBP."

Respondent 28: "So no matter what, whether we take candidates with experience, industry experience or sales experience. They will go through our product training. In the sales business, there is also a lot of legislative training that is required. The learning team focuses on what is required from a legislation perspective."

Respondent 31: "Within the sales call centre space, they have a very structured approach to training and learning. So the minute they start, they go through standard and legislative training by the internal team."

Respondent 32: "A way learning or training is identified is when there is big change in the business and because of that big change there is a need for upskilling or knowledge build. The business will then work together with the learning team to devise a learning plan."

Respondent 33: "There has been so many changes in the business that has resulted in restructuring and realignment. So after the changes, we do a skills audit. Once the new structures are in place, we look at what the new role requires versus what skills are available and then identify what those gaps are that require training or development. What we now need to identify is the future fit skills our workforce.
In order to identify this, we will work now with the central HR team to identify what those future fit skills are."

Respondent 34: "This would be with the skills gap analysis that the internal training and development unit learning consultants do with the business units they look after."

Question 2:

What type of vendors are often used to deliver learning, training and development initiatives

- Internal Training and Development Department
- External Technical Service Providers
- Informal internal learning/ coaching & mentoring
- External tertiary/ technical institutions

The following tables displays answers in response to the above question.

Use of internal vendors
Respondent 3: "For the learning and training part it would normally be the internal training provider."
Respondent 4: "In the customer services business, they usually go to the internal learning and development team because they have the product knowledge to train for."
Respondent 6: "Initially, the guys will try the internal team if they are technically inclined to train for it, then they will use the internal team as it is more cost effective."
Respondent 7: "Most of the product and system training is facilitated by the internal team. Aspects such as coaching, senior leadership development has a more focused approach. Specific external learning services partners are required to deliver this based on the level at which it is pitched."
Respondent 12: "For product and processing, they use us, the internal L&D team. With really technical things like Agile training, scrum master training etc they either go directly to the centre of excellence or to external technical institutions that can offer that certificate or accreditation."
Respondent 13: "So for product processing and system training, they use us, the internal L & D team. For IP or OM based knowledge training, they would use us or subject matter experts in the business, like skills coaches or someone that has been working on the product or platform for years. The SME is not a formal role in the business it's just common knowledge in the business that, that particular person is the expert in any given process. For learning Fads, what's new at that time, for example like agile training. The organisation would mostly likely use external providers, because there are millions of accredited suppliers that can offer

that externally that Mutual may have partnered with. Generally, the L & D teams don't have the internal expertise to offer this type of training."

Respondent 18: "So the internal learning and development team is used predominately for admin related training because they are experts in Old Mutual process and system learning material. With the capabilities, like robotics, we source technical external suppliers because we don't the capability to train for those capabilities as yet. I say as yet because I believe the learning and development teams themselves need to also have an opportunity to reinvent themselves and the services they offer to the business."

Respondent 20: "For the business as usual training, the internal team would take care of that."

Respondent 21: "If we talking about technical training in the segments, then they will definitely use their internal resources and internal team. When we talk external, we don't have the relevant capability. For training such as leadership interventions and your stuff other than technical training, the soft skills, we don't have that internal capability within the organisation. So for that training, we always using the external partners to deliver our learning, which is not always good because then don't own some of those IP."

Respondent 23: "So we generally try and partner with the internal central learning teams for most of our learning initiatives."

Respondent 29: "So we start with the internal team. Depending on the learning track, if they cannot offer it internally, then they will recommend an external service provider."

Respondent 32: "So for all the technical business related learning will be done via the internal training and development team."

Respondent 33: "The internal training and department knows the business unit needs really well so they would also recommend either internal or external service providers depending on the business or learning needs."

Use of external vendors
Respondent 1: "For our technical training, I know we have an agreement with external training provider Torque IT which offers our technical training in IT, such as ITIL etc."
Respondent 2: "In the area's in which I am in, it's a combination between external training institutions and technical or university type institutions. Also technical institutions such as FTI, Torque IT and all those people. Then we also rely on service providers such a Deloitte or EOH to tailor courses and then offer to Old Mutual because in my space, the courses are very technical. We rarely go to the in house Training and Development team to assist with training."
Respondent 10: "On the actuarial side and very technical skills roles, the business goes external. For the masses and lower level roles, that's usually done in house by the internal learning and development teams."
Respondent 11: "Often external institutions. We would then check in with the learning team to check if the vendor has been used before and if they exist on our approved list of vendors."
Respondent 15: "When it comes to running MDP, Management development programme for our provisional managers, area managers or product managers, for that year long we use a combination of our internal training staff and bring in the help of a service provider."
Respondent 16: "We will use external providers because the skills are that scarce so we are looking into licensing agreements for online learning that will be specific for data science and data management. *So given how scarce and new these skills are to the market, it will always be important to use external industry leaders."*
Respondent 17: "If the business wants a specialised course or something technical they will go usually go directly to their HCBP or a learning consultant and ask what external service provider can provide the training."
Respondent 19: "Often with accredited course, we have been using external service providers, especially when we want accredited management related courses like GIBS."
Respondent 24: "So if the business wants externally accredited programmes, especially for leadership programmes, we would then consult an external provider or tertiary institution. For programmes like GIBS or management advanced courses we would use external providers."
Respondent 26: "If a team is going through hectic process or system change, we might use external providers if the internal teams cannot train for it internally."
Respondent 30: "For your more advanced or specialist skill set, it is definitely external service providers. Usually go external especially when the client requests customised training."
Respondent 31: "So for external courses such as project management courses, those are external. Most of the role required training, technical or legislative training is done by the internal learning team."

Question 3

Do the business units have the budget allocation / funding necessary to introduce the required learning, training and development?

The table below depicts the responses to the question above.

Yes
Respondent 1: "Yes, they do. That's one thing about the Mutual office, they have an absolute employee value proposition. Old Mutual doesn't slack on training and development."

Respondent 2: "Yes, the money is there and the training is supported by management."
Respondent 5: "Yes, because it has to be a part of the business budget."
Respondent 6: "Yes. Generally, OM has a culture of wanting to train and development so they will usually find the funding if the training would be an advantage for the business."
Respondent 7: "Yes, They would then already include it in their initial business plan for the following year."
Respondent 8: "Courses and budget has to be made available in order to make sure that we don't lag behind in industry."
Respondent 12: "Well for the most part of internal training, the team works on a business funded model. This means that a particular segment, example, Wealth will pay for two dedicated learning resources and those resources sit in our team and deliver all the required learning to that business unit."
Respondent 13: "So for internal training, the business gives us fixed funding. So the business gives fixed funding and we give them learning equal to that funding."
Respondent 14: "Yes, they do it in the previous year of business planning."
Respondent 15: "Yes, it's it comes from the learning and development budget. We get pre allocated funding for annual training initiatives."
Respondent 16: "Yes, they plan for it. Also, they need to show they contribute to skills development."
Respondent 17: "Yes. For internal training and development, we get funded by the business unit."
Respondent 18: "Yes, budget is allocated in advance for the following year."
Respondent 19 :"Yes, they have allocated budget that would have been signed off by executives last year already."
Respondent 20: "So for the product and system training, it stems from fixed funding's that's mandatory for the business since they need to be equip to service clients. However, when it comes to bringing in an external provider then, many a times the budget it not available."
Respondent 22: "So for projects, yes. With learning interventions, we as the Learning Academy, we get a budget."
Respondent 30: "Yes, it is a part of the budgeting cycle."
Respondent 31: "Yes, the business gets an allocated budget. So they make selections on what they think is the critical learning needs at that particular time."
Respondent 32: "Yes, they do. It is allocated in business planning."
No
Respondent 9: "A lot of people sometimes would identify external training for themselves which the internal business school can't necessarily offer and you would hear "we don't have funding for that."
Respondent 11: "Budget, it's always a constraint. In my view, it depends how the manager views training, because they will make budget available if they really want their staff to go on training."
Respondent 21: "No, not always. Learning has always been seen as an extra cost. If anything required cutting, it would be the learning budget."
Respondent 27: "Some business has got the budget but do not actually have the knowledge of how to plan for the training spend, which is a gap and requires upskilling."
Respondent 29: "Not always. Budget isn't always available, I try and enable my area to always plan for it in the general business planning cycle, but that doesn't always go smoothly. The business is much more focused on direct sales."
Respondent 34: "The business units and organisation at large is looking to be more cost effective so there isn't always as much money for training anymore."
Sometimes
Respondent 3: For external training, they generally most of the time. There has only been in one instance I can recall where they did not have the budget because the group was that big and they declined the external training.
Respondent 23: "For the most part, yes, we try and leverage the skills development budget. The business unit has money and budget but that mostly goes for professional developments because it's quite expensive."
Respondent 26: "Where we get budgetary constraints is when it comes to formal learning such as diplomas and degrees. Where staff apply for study aid."

Question 4:
In your opinion, is the internal training and development team equip to train and development the newly identified scarce skills?
The table below depicts the responses to the question above.

Yes, they are equip
Respondent 1: "I think they are on board with new ways of work, I think they are driving it as much as they possibly can."

Respondent 7: I think they have the capability. One other thing, is that our technology can do with some upgrading. Once again, we are hoping to see a change with the system Workday landing."

Respondent 16: "I believe the team is competent yes but requires a change in mind set about how their services are used. In the D & D space, it is specialist and has niche skills and I don't believe they have been equipped to train for those skills."

Respondent 17: "Definitely not everybody. It's a work in progress. We also need to take into account the fast pace of technology and the way people want to learn has changed from generation to generation. Most of the people in this learning team have been here 15 or 20 years and now to expect them to keep up with this pace, is hard."

Respondent 18: "Right now, yes they're getting there. I believe the learning team is on a change journey and they have started to implement a new model to try and set themselves up for success."

Respondent 20: "Yes, some team members in the team are equip. It's their focus area. Others, not as yet. Formal training has not happened for all the learning staff, capacity is an issue and making sure the business receives the mandatory training they require."

Respondent 25: "The team is competent yes. Everyone like I said can benefit from that new ways of work training."

Respondent 32: "Yes, I do think they are. We have really strong resources in that team. They are constantly upskilling, benchmarking and putting their feelers out about what is new and relevant."

No, they are not equip

Respondent 2: "No, there is a lack of technical knowledge or business knowledge. However, the team is really geared up to train the customer service business based on new products or services."

Respondent 3: "I don't think we'd be able to train for all of those new skills, especially when it comes from an IT point of view. Again, I think it's a lack of training."

Respondent 4: "No, I don't think so because most of them has been in the roles for so long, and they don't have sufficient or forward thinking skills to train for these new roles. The team is still very stuck in the old system, old ways of thinking and training."

Respondent 5: "No, so most of like, training that we need, we actually have had to go external because we can't find the help in house. Otherwise for the operation like service business, yes, they are able to train and upskill but a definite no for the digital and data business specifically."

Respondent 9: "Usually for a lot of the cutting edge stuff, the innovative stuff. We would generally look for external vendors to provide that sort of training. So I think that our internal L &D team focuses mainly on product and system training."

Respondent 12: "Now, that we are required to offer a full digital learning experience, we are struggling as a team. Also, Old Mutual hasn't offered our entire team upskilling on how move all learning to a digital portal, so we kind of doing our own learning in our spare time and paying for it ourselves to try and stay current."

Respondent 13: "If you referring to something technical like Agile or DevOps , then no. We certainly don't have that type of technical knowledge in order to train for those skills. So something that's of a technical nature, outside of our product, processing system training, I believe we the ability but we haven't had the exposure or the upskilling to learn how to train for these skills."

Respondent 19: "No, not really. Well the team really is just used for the internal technical training. That the team does a really good job at that. For the new scarce skill training, we still go outside and I don't foresee that changing"

Respondent 21: "No, I don't think so. There's isn't enough focus in terms of upskilling HR professionals and keeping us abreast of the new things. Also capacity is an issue so I think we also are so under resourced, so the teams do not have the time to do all those new refreshing of skills. Also, there isn't always available budget for HC upskilling."

Respondent 22: "No, we don't even know exactly what scarce skills are critical. We also need exposure out in the market. We also need to be briefed around what these skills look like and how to train for it."

Respondent 28: "So our team is definitely competent to train for those technical role related skills, the things that have always been required. I don't think so when it comes to stuff like agile courses or so."

Respondent 29: "No, okay. Well, let me explain. So, the team can offer the core technical training but I don't believe nor have I witnessed them being ready to offer the business the training for the newest skills out there."

Respondent 33: "That's a tricky one, but I would say no. A lot of the people who are in the learning space have been there for a really long time. The shift for them itself to the new world of work and new skill sets are hard."

Respondent 34: "No, lots of work to be one and a huge mind set shift that is required from the team itself around how to train in this new revolutionary world of work."

Question 5:
In your opinion, what do you believe OM should introduce or acquire to train and develop newly identified scarce skills?
The table below represents the improvement suggestions offered by respondents

Tangible
Respondent 3: "I think we would need a learning management system. Something like what we are getting with the Workday system.   *Respondent 8: "Invest in seminars and workshops and hackathons, especially for technical skills."*   *Respondent 12: "I think the internal L & D teams should have access to more online learning for themselves. I would also suggest actually going to see what other companies do. A company like Friends of design, see how they do online digital learning."*   *Respondent 17: "A lot of what we need is to introduce a more flexible way in which the organisations delivers learning. There are so many rules and regulations about restricting internet usage and networks and portals etc."*   *Respondent 19: "We need to adopt of a proactive approach to training as opposed to reactive and watching what the competitors are already doing."*   *Respondent 20: "Well a new learning and development tracking system so we quite keen for Workday to land. Also we need an easier reporting functionality."*   *Respondent 22: "Training for the actual HC Team. We need to attend new conferences where we can see how and understand how other companies are doing it in the market."*   *Respondent 24: "The HC community really needs to shift to the new way of working. Everybody needs to go on an agile workshop."*   *Respondent 27: "Invest in a SME (Subject Matter Expert). They are responsible for knowing everything about this platform or technology, they should be aware of what is changing, being replaced or new."*   *Respondent 29: "Aspect that needs improving is how we structure our learning teams."*   *Respondent 30: "We need to do immersions to other organisations and see what they have done very well and very quickly."*

Intangible
Respondent 1: "I think one key thing to happen throughout the organisation is agile training. Because agile speaks to more than just a belief."   *Respondent 2: "We need to consult with external partners but as an organisation."*   *Respondent 4: "Definitely a better investment in training up internal staff, offering more support for them to do their current roles."*   *Respondent 6: "Get an external person in to come train or transfer knowledge and skills."*   *Respondent 7: "One thing Old Mutual also needs to introduce is a fail safe environment. One in which people are allowed to fail fast and take the learning and then run onto the new project and use that failure to do better."*   *Respondent 13: "It needs to start with the business identifying what are those scarce skills this organisation wants to focus on. The business needs to provide a clear view. Then, the business needs to provide direction around who delivers the upskilling and enhancement of those skills."*   *Respondent 31: "I think a huge culture shift is required when it comes to learning."*   *Respondent 33: People need to adapt to the online training and the self-management that it comes with."*

Next, participant's feedback on section D is provided.

Section D: Retention

The following section provides the answers of the respondents to section D of the interview guide.

Questions within this section were focused on the current retention practice at the relevant organisation.

The purpose of these questions was to discover if the organisation's current retention strategies were sufficient or if the organisation requires more modern offerings.

Question 1:
Based on exit interview feedback, what are the main reason talented and scarce skilled employees leave the company?

- Lack of growth and promotional opportunities
- Relationship with supervisor/ management
- Lack of career pathing
- Poor implementation of performance management
- Lack of challenging work or rotational opportunities
- Misalignment between organisational and personal goals and vision
- Compensation & Benefits

The table below represents the respondents answers relevant to tangible and non-tangible items listed above.

Tangible
Respondent 1: "It's definitely money factor, specifically with developers and programmers. Unfortunately, it is what it is. They are genuinely over overpaid."
Respondent 2: "In some of my exit interviews on the SAT programme, one of the push factors was that Old Mutual wasn't paying their people like they pay service providers or contractors. So there is a huge discrepancy in pay. Old Mutual pays a premium for third parties and contractors."
Respondent 9: "One is compensation. I find that especially when asking people about packages, the package they are leaving for is way better than what they were currently getting at Mutual. The other one is the career development and growth. It takes too long for them to progress. Some people have been sitting in the same role for ten years. Then the other thing would be the leadership style. Either it would be around favouritism within the team, they feel like they don't get fair opportunities across the team or the way the line manager talks to the team is rude and abrupt."
Respondent 11: "I do think that benefits and compensation play a part. We say that we are competitive with our salaries however from a tech perspective, I don't believe we are. Even when we look at some of the other offers people get externally, it is higher. Also, a lot of people have struggled to move into the new world, and the culture and how we do things and operate. People often say to me that they feel that the niceties and the family culture and friendliness, all of that is out by the window because of the workplace pressure. A lot of people have said, I've been here for 30 years, and the past two years has been the most stressful time in my career."
Respondent 14: "It would mostly be for better compensation and benefits. Moving for a more attractive package."
Respondent 20: "So definitely compensation and the lack of tangible benefits. In comparison to other companies, there isn't anything exciting offered. Also, lack of growth."
Respondent 23: "For the level of skills scarcity, we have in our business, another company will always be willing to pay more. So at any point in time, a competitor can make a more lucrative offer."

Non tangible
Respondent 3: "I would say it's because of where the organisation is heading towards and where people are personally in their own lives, so misalignment I guess yeah."
Respondent 4: "In terms of management relationship, Old Mutual appoints technical specialists that can do the job well, but they lack actual management and leadership skills. In most cases, that then creates a working environment that becomes unbearable and staff can't progress in the team. Also, lack of challenging work, they need to challenge employees more and not box them into only certain duties, but rather give them part of the seniors tasks to do and then see if this then stretches the person. So in terms of salary, the pay lines are not bad but the benefits become an issue because everything is deducted from your TGP, which brings down the actual nett salary."
Respondent 5: "It's around a lack of development opportunities, and this is across all role sizes. It takes long to progress to move ahead."
Respondent 6: "Some lack career growth so they have been stagnant for a long time in a specific job. Perhaps they want to widened their role, maybe move into a more strategic role but they're not getting the proper support to actually do it so they end up leaving to an organisation where they can fulfil the role there. Then compensation where they get a better offer outside and somehow we can't match it really. We can't retain them for a long time because their skill is in such high demand."
Respondent 7: "I think people leave because of how big Old Mutual is and how much longer it then takes to progress."
Respondent 13: "I think we really struggle to retain top African black talent. People may also feel like they not aligned to the values of this company any longer. They feel like the organisation mentions really good values, but they don't really see it being implemented."
Respondent 15: "For really talented employees or scarce skill employees, I think its growth. The growth path is long, takes them too long to move up so its easier to move out and get a better job externally. Those staff

can't stay too long in a specific role or space, they crave opportunities to rotate or do more and sometimes as an organisation we take too long to offer them that."
Respondent 17: "It's lack of progression. There seems to be no clear indication of where the individual will progress or go to and that frustrates them. In some instances, it's been lack of leadership or really bad management, so people refuse to be in an environment with a leader they do not respect."
Respondent 21: "So often we losing top talent because they feel like they are not aligned to the organisation's values. The organisation is too conservative and slow and they want to move on because although they think innovatively, management still dictates that things need to fit into the same Old Mutual mould."
Respondent 22: "For scarce skilled people or talent people, it's definitely career progression. So they believe that they are ready for the next stage, but they are not getting the opportunity in the business."
Respondent 24: "I guess it would be misalignment of organisation and personal vision. The organisation is always looking for cost effectiveness. Yet people with really scarce skills want to try new things and that cost money and leadership buy in. This doesn't always happen so they become despondent."
Respondent 25: "Many times a person is regarded as a high performing individual in the one area of the company or one on system yet when they want to move or rotate to do something more exiting or challenging, the business has such a huge dependency on them that they cannot then move."
Respondent 28: "It is definitely due to leadership style. Look, the managers in the sales business are very hard core."
Respondent 29: "A large part of it is management. A large part of our management workforce or leadership workforce is struggling with managing millennials."
Respondent 30: "So we appoint these scarce skilled individuals and they come with a different way of doing things. They're good at what they do, but they keep getting shunted or told to stay in their lane and not change things up. We keep them in those roles that they get bored, so its definitely lack of challenging work."

Question 2:
In your opinion, do employees find the total guaranteed package attractive?
The table below indicates responses relevant to the total guaranteed package being attractive and unattractive.

Attractive
Respondent 2: "I think generally Old Mutual does have an attractive offer. However, people don't like that the Old Mutual medical aid is their only option."
Respondent 3: "I think if you look at It in comparison to competitors then the TGP is fairly good."
Respondent 13: "Yes, Old Mutual pays a good salary. It is at least meeting the average of the market. The benefits however like flexible working hours or working from home, we lack in overall benefits like that."
Respondent 16: "Yes, the pay lines are broad enough to compensate fairly and attractively."
Respondent 17: "The TGP option is known to be fairly stable, so it has the option of a disciplined savings options and allows people to save their own money in a more disciplined and structured way."
Respondent 22: "Yes, I do believe that we quite competitive."
Respondent 23: "Yes, I believe our salaries are competitive."
Respondent 24: "Yes, they do. Most people that I have engaged with do."
Respondent 28: "Yes, definitely. We offer a basic Salary to our sales staff. We offer benefits such as a pension, life assurance and medical aid allowances. Also many of our competitors have something called lapses. So this means that if you signed a customer and this customer cancels in two or three months, even though they have already been paid out on that commission, there will be a buy back on it. With Old Mutual, we don't have that. Our system is once they have sold to a customer, they get commission when the customer pays their first premium and then every six months after that, they get paid a bonus for when the customer is still paying at 6 or 12 months."

Unattractive
Respondent 1: "I don't think they find the package attractive. Often when they realize what the compulsory benefits are, it's disappointing. So we actually not giving people the flexibility to decide what to do with their money."
Respondent 4: "No. If I compare it to its competitors, we're not actually the best. We offer really standard benefits for such a huge company."
Respondent 6: "No, the reasons are that medical aid comes completely out of that TGP fully that with the pension fund Old Mutual only contributes 3,5% and other companies usually give like 5%-7%. So when they actually look into the data, the package isn't that attractive then."
Respondent 7: "For the most part. I don't find that people always understand it very well. The medical aid piece is definitely questionable."
Respondent 8: "No, not really, in terms of the salaries and comparison to the market."
Respondent 9: "Not always no, really it depends on which level they are at. Also depends on what business unit or job family they are at."

Respondent 11: *"No. So from a package perspective, we are not really offering people something that is truly competitive. There are no discounts or special rates on any products or insurance as part of the package."*
Respondent 19: *"No, based on Old Mutual benefits and medical aid deductions, the TGP amount decreases significantly."*
Respondent 27: *"No, it really depends on the level; We actually need to get other benefits to make it more attractive. So things like tangible benefits added to the monetary package."*
Respondent 30: *"I think when they initially see the TGP number then yes. However, as a HCBP once you get to the point or opportunity to sit down and explain to them what's in the package, so the full remuneration offering, they are often disappointed based on all the deductions."*

Question 3:

In your opinion, is the workforce engaged and passionate about working for the company?
The table below represents employee in relation to being engaged and passionate and then disengaged and apathetic.

Engaged and passionate
Respondent 1: *"In some pockets, you find phenomenal resources internally that's very passionate about what they do."*
Respondent 2: *"Yes, I think this brand has a lot of loyalty tied to it."*
Respondent 5: *"I've never met anyone that doesn't like the company as a whole. It's just when we actually drill down to the business leaders actually, that's where employee experience differs."*
Respondent 6: *"Yes. If I look at the IT business and the people in IT. They are passionate about their work and their deployments."*
Respondent 7: *"Yes, but not at all levels. I find that our older generation is more so than our new generations like the millennials and Gen Z's. I think the older generation is more appreciative. Younger people want to complete tasks quickly and be rewarded quickly."*
Respondent 8: *"Some people, it depends which area people are from. There are areas that are excited about being here and the work they do. Other areas need a total refresh in terms of the location, in terms of the facilities and culture."*
Respondent 9: *"Once again, there are pockets of different people. So there is this pocket that is disengaged and basically just waiting for the retirement package. I definitely also see a pocket of people that are highly engage. They are super excited to work for the organisation."*
Respondent 10: *"It really depends on the leader. There's some areas where the GM's are engaged with the staff and the senior leaders are visible. In those area's you see so much excitement and engagement."*
Respondent 11: *"Yes, when you hear people speak, they speak with a level of pride about being a mutualite."*
Respondent 20: *"A handful of people are passionate and love being here."*
Respondent 21: *"A lot of the people that stay for a long time is because it is a good company to work for. Sometimes you either really lucky when you get a really good leader, to get someone that's able to motivate the team members."*
Respondent 23: *"I do believe it depends on where you sit in the business."*
Respondent 32: *"So the differentiating factor is that in MFC the culture is amazing, that is why we have so many long tenured employees."*
Respondent 33: *"Through all of these challenges and changes in the organisation, you still see people trying to push to achieve."*
Disengaged and apathetic.
Respondent 3: *"The last year, it's been tough because I feel there's a lot of pressure on people and workload is a lot more than what it has been previously because organisation is going through change. Also, the additional pressure is where people become demotivated, deflated and tired."*
Respondent 4: *"Of late staff are having huge problems with management relationships. People are saying management have changed. They describe the environment as inflexible, it operates like a factory. At first it used to be all about how the employee feels. Now it's all about saving costs."*
Respondent 12: *"If I look at the youngsters coming in, they are passionate and want to do new things, which is brilliant, but I think people that are working here for like 20 or 30 years are no longer engaged or excited."*
Respondent 13: *"No, a lot of people are not. It appears we are getting rid of the leaders of people orientated and appointing more task drivers. There isn't time for people and their development."*
Respondent 14: *"If you survey staff you will get different feedback based on where they are at and the management style within a specific business unit."*
Respondent 17: *"Majority of people that I deal with are not really engaged because there has been a lot of change that has directly impacted them or their teams."*
Respondent 19: *"Some people are really energised and others not."*

Partly, there are a lot of complaints about the change that occurred over the past 3 years and these changes will continue to occur. People feel like these changes have impacted their teams and pockets and they are not happy about it."
Respondent 24: "Majority of the people, no. I would say there has been a trend, especially amongst people that have been here for I would say like 15 years plus. These individuals are leaving."
Respondent 26: "I think there is just a lack of passion. I am not seeing it or experiencing it."
Respondent 31: "With all the changes people just don't know what's coming and that has impacted the morale of the staff."

Question 4:

In your opinion, are employees experiencing an encouraging work culture?

The table below represents respondent's feedback in relation to a positive work culture and a discouraging culture.

Positive work culture
Respondent 2: "It's different within different business units. Where it is positive, it's because line manager support is amazing. Where it is not positive, is where managers are absent, line managers are not engaged and expectations of the line manager is just too large."
Respondent 6: "There was a PSA that are hired and she was invited to a function before she even started. She was saying how nice that was. She felt like she was a part of the team."
Respondent 7: "It depends on what team people are in and who their leaders are."
Respondent 8: It depends where you are. I'm thinking of the robotic space and Digital and Data. That is an exciting space and now they are doing exciting stuff so they are experiencing a great culture. They have high energy dynamics so these areas generally have really engaged staff."
Respondent 9: "It's different in various pockets of the business depending on the line manager."
Respondent 10: "It's based on the area you in and who the leaders are in that area."
Respondent 16: "I can see an improvement from the engagement survey questions. The guys are enjoying showing how they have contributed to the digital customer experiences."
Respondent 30: "So it differs from team to team and from leader to leader. Others might be so excited to be here and do new things and others might not want to come into work"
Respondent 31: "The organisation is trying to create a good culture, with the little events they have."

Discouraging culture
Respondent 1: Some experience phenomenal opportunities and culture. And then others are depressed about the changes."
Respondent 3: "It depends on where you are in the business and the changes the team is going through."
Respondent 11: "Some sections may be slightly more difficult to be in based on manager or the work they do"
Respondent 13: "The workload in the business has a big impact. People are having to do double the workload for the same salary and with the same reward. This is demotivating the staff. There are also not the attached monetary incentives or pay progressions given to people to actually motivate them. Also, the culture in the business is that the business and leaders are very cost driven and money driven."
Respondent 19: "Somewhat, it has a lot to do with the type of employee, type of team and type of leaders."
Respondent 20: No. The workplace is moving so fast and there are people currently that's not able to keep track with that fast moving pace and therefore they lag behind. Once they then lag behind, they then become unhappy with the amount of work."
Respondent 22: "So really top talent people have left because there was a complete misalignment with management style and values. They usually first raise what is happening but if they don't see a positive change they will go."
Respondent 23: "Dependent on where the individual is based and who the management is that's heading up that area, it will then inform whether a good encouraging culture is offered."
Respondent 24: "So if people cannot adapt with that change, then they become negative and leave. For those that can shift with the digital and agile way, they enjoy it."
Respondent 26: "The organisation tries but it's about where people are, who their managers are."
Respondent 28: "We've done exit interviews and we've found the core problem and it all falls down to management style. Sales is difficult and it's not an easy environment to work in, but people in the field do not get the support from leaders."
Respondent 32: "In the enabling space, the experience is a little bit different. It is a high pressured environment. Also, I think the HC community is still recovering from structural changes, so I do feel a little bit of a lull in the culture."

Question 5:

What current retention strategies are utilised in your business unit?

The table below represents respondent's feedback in relation to monetary and non-monetary related retention strategies.

Monetary related retention strategies.
Respondent 1: "I'm aware of the incentive plan which is a long term thing. Also, I have had an opportunity to do a counter offer. But it's purely based on TGP, monetary value. We never really open the conversation on what is the full package that you want in order to stay."
Respondent 2: "Nothing really non- standard. Bonus and share allocation really."
Respondent 6: "We don't do much right now. If we hear people have signed another offer, then we potentially look at a counter –offer. We actually need to get to a point where we looking at our current people and their skill set and value and reward them for that."
Respondent 8: "At Old Mutual, we don't do counter offers so that really sucks."
Respondent 9: "Incentives, so the yearly bonuses. Also like the shares, that's used as a retention mechanism for senior roles."
Respondent 10: "Also, in the actuarial space, they might offer role size N positions a smaller share allocation, where that is a retention mechanism usually used for role size O and above. Also, in the actuarial space, they use counter offers because it's such a scarce skill. Then in underwriting, they offer a smaller additional bonus for those that are high performers, but it has a claw back clause, so they can't leave within a certain amount of time."
Respondent 11: "We don't have freedom to counter offer. So people often come with an offer that we can't match in terms of salary and we lose people. Other things that managers try to do is to tell the employee that a vacancy will open and you're welcome to apply. This mechanism is used to try and keep the individual with the business."
Respondent 14: "We have had instances where we have used counter –offers for very senior roles. We have also tried to offer talented employees or high performing employees an opportunity to get exposure to leadership roles and leadership training to elevate them to the next level."
Respondent 22: "So the firstly to check from an incentive perspective, are we paying this person correctly. They would also look at rotation or career progression Also, HCBPs would look at if it's an exposure or different experience that they can offer the individual."
Respondent 23: "We have retention bonuses, that people have to pay back if they want to leave.
Respondent 24: "Management will ask the question about has the employee really added so much value, that I cannot afford for the employee to leave. If so, they will see what development program they can offer to retain the individual. Very seldom have I heard of counter offers in terms monetary offers."
Respondent 26: "At higher role sizes, it is the share allocation. This locks them in for a minimum of three years."
Respondent 30: "Also our remuneration structures match to regarding top performers. So the rating that gets allocated to an employee will reflect that the employee is an exceptional performer and also their bonus structure will be linked to that."
Respondent 31: "There are development programs that they would use to retain people they view as top talent. Also, give the person exposure to a higher role. The person gets exposure to new roles and doing work at the next level."
Non - monetary related retention strategies.
Respondent 3: "I can't think of anything really. We need to do more."
Respondent 4: "Some areas use secondments or job rotations to keep people challenged. Not really much."
Respondent 7: "I believe our retention model requires attention. I also believe that our retention model needs to be aligned to our talent model. Right now, the only retention strategy we using is the fact that we can offer lucrative bonuses structures at higher role size levels. So senior executives who have the share allocation won't just leave. We also send our high performers on special learning interventions yet we don't create opportunities for them to apply the learnings."
Respondent 13: "We try with our recognition programme to retain people, but it's very difficult to get it embedded into a culture like this. There are development opportunities for those that are rated high performing talent. Only those isolated few get those opportunities."
Respondent 15: "Our business unit will focus on using development to retain top talented staff or those with scarce skills. An example of one of this retention programmes, was the Velocity project. The Exco selected the top hundred employees, who then went through an assessment to check if they are ready for the next role."
Respondent 16: "We work on the basis that if you received an offer, we don't counter offer you, however we often offer a role that challenges them.
Respondent 17: "I have seen the organisation make an effort to keep people. It usually surrounds a development or progression commitment to the individual. There will be more of an effort for management to have a conversation around what the company can do to keep them."

Respondent 21: "We have the Velocity programme, the idea was to build a pipeline for our scarcest skills or roles, especially leadership roles. We also try and offer a mixture of formal and on the job learning and training. We offer HIPOs mentors and coaches that can train and upskill them in the roles they aspire to." *Respondent 25: "Put high performers on an accelerated programme etc."* *Respondent 28: "Old Mutual is not agile, they don't change things on a yearly basis. They will have something in place and like 10 or 15 years later they still have the same thing."*   *Respondent 32: "The velocity program is an accelerated development program, which aims to upskill and develop our high performing talent. We hope that the outcome of velocity will be that people have an inclination to stay with the business then. If we hear that someone is about to leave, quite honestly we're not always in a position to go ahead to counter offer. Bonuses are allocated annually though"* *Respondent 33: "For our top talent it would be offering learning opportunities that are really great. So we always bring those people onto programs that would benefit them and the business."*

Question 6:

Are you aware of any of the following modern techniques being utilised within your business area?

- Management Monitoring
- HR Retention Metrics
- Transparent communication

The table below represents the answers in relation to use of data or soft skills.

Data related
Respondent 5: "We use HR metrics, well the MIS specialist for the team works with HR related data. However, I am not aware of the management monitoring." *Respondent 7: "Well in our team, on a quarterly basis we used to do an exit analysis. We would create a dashboard and that would highlight any hot spots and focus areas for when and why certain people were leaving. With regards to the communication. With the culture survey, they will do an analysis and share the results openly."* *Respondent 11: "So with HR metrics, as a HCBP I would look at the turnover level and then do an analysis of what is happening in that space. Then, I don't think that communication is transparent. So there's instances where managers know something is about to break out, yet they don't give the line managers or employees line of sight of the change."* *Respondent 14: "With metrics, we have heaps of data from different sources but it's not used effectively to actually track or retain individuals. Also, Old Mutual definitely doesn't communicate transparently enough."* *Respondent 15: "From a metrics perspective, the HCBP's have exit interviews and capture that data on oracle. Then transparent communication is not always used."* *Respondent 17: "With retention metrics, data is gathered from exit interviews but I don't believe it is actually being analysed correctly and used so that things can actually change."* *Respondent 21: "With the retention problem, I used the data and simplified it so the provincial leaders could see there was a retention problem and so they had to take action. "I think the organisation tries to communicate transparently but they actually don't. They don't communicate about the things that matter to the people"*
Soft Skills
Respondent 1: "I have never heard of management monitoring." *Respondent 2: "Yes, we applied the management monitoring aspect in the architecture space. We had a high turnover in the area and then we had to intervene by surveying the people who left. We surveyed them around topics such as leadership, rewards, process and structure. Just basically all the elements that make a successful team. With communication, I do think we communicate openly about most things, if you think about things like the newsletters or the IT strategy updates."* *Respondent 3: "I have never heard of the management monitoring thing. With transparent communication, I am quite impressed with Old Mutual. For instance, if I look at what happened last year with our CEO and the media, I was actually really impressed with Ian and his constant communication.* *Respondent 4: "With the management monitoring thing, Old Mutual doesn't do anything about it unless it's really bad. People actually leave a team because of the same manager they have complained about yet the person is still here like years later."* *Respondent 6: "I actually haven't seen the management monitoring aspect before."* *Respondent 8: "With the management monitoring, usually it doesn't go very well because people operate in a culture of fear. They are afraid of being too vocal and being victimized."* *Respondent 9: "I don't believe we use transparent communication to retain staff."*

Respondent 10: "I don't think Old Mutual is very transparent around initiatives that impact staff. With the management monitoring, we don't do it actively. I can think of a particular area where there was a lot of people leaving, but because that manager did her job well, nothing then happened. Then, with the retention metrics, the HCBPs do retention interviews but the information is not used to generate real data that can be used to see the impact of staff leaving."

Respondent 12: "With the management monitoring, the HCBP sees a trend around this feedback, they will intervene in their business units. For transparent communication, I don't think Old Mutual is transparent. If you look at some of the most recent business changes, there were mixed messages given to the staff. Then, I have never heard of us using the data we do have to track exits and retain the scarce talent that we need to keep"

Respondent 13: "I have heard about the management monitoring aspect before, people raise their issues but it's very rarely addressed immediately. I think HR doesn't intervene quick enough in the people issues. I don't think Old Mutual is transparent with their communication. Especially with aspects like automation and its impacts to staff."

Respondent 16: "With the management monitoring, we have done the environmental scanning.
We will have check ins with people where we hear rumblings and ask them informally -so what challenges you are currently facing in your role?"

Respondent 18: "With management monitoring, if there is a serious problem in the business it would generally get escalated to the executive for the area and that executive would partner with their HCBP to do an intervention in that area. I think when it comes to communicating transparently Old Mutual gives as much information as possible, they don't give out information that will cause panic or stress amongst the staff."

Respondent 22: "With transparent communication, it again this comes down to the leader within that particular team. If the leader is a transparent person then automatically there will be a transparency in the way they communicate."

Respondent 23: "We communicate known facts in this business, never speculation because it doesn't sit well with the type of audience."

Respondent 24: "With management monitoring, the HCBPs and us in learning get involved in that. I have noticed in the one area, the retention rate is really low and as a learning partner I have got involved from a coaching perspective. I check if there is a gap with the line manager and is it a skill or will to do something and then recommend an intervention. With communication, people are often not given enough time to actually process the information or change provided to them before business is required to go on as usual. Then, HRC roles are every good at gathering the data via exit interviews, but I don't really know what they do with that data."

Respondent 25: "When there is an issue with management, if the HC team or leadership is aware we will get involved where necessary. Also, we use our exit interview data to check if we can proactively deal with aspects of why people are leaving. The organisation communicates transparently. They use emails and the HC team and the leaderships in the provinces to communicate changes."

Respondent 27: "I don't believe that the organisation is as transparent as they can be. Not the right people know things when it has a direct impact on them."

Respondent 28: "With the management monitoring, there is absolutely no consequence management for managers that are disrespectful or don't do what they need to do. Then, we don't have an analytics person at the moment but we look at the exit interview data and see if there are trends where we can actually do something about it to bring about change. For communication, it is not transparent at all, for those in the regions it is even harder."

Respondent 29: "With management monitoring, If I am aware of an issue, then I intervene. We communicate via email but don't engage with staff directly so they may still perceive it as not being transparent. In our business, we always doing exit trend analysis."

Respondent 30: "So with the communication, there is definitely room for improvement. The management monitoring does happen, when the HCBP are alerted, they do act on the information and investigate the merit of the allegation and when warranted, the BU leader might then get involved.

Respondent 31: "The organisation does not communication openly with the staff, there isn't direct communication just some email with the bare minimum. If there is a problem with management, I have seen it being addressed almost immediately when it comes to HR's attention."

Respondent 32: "The business does communicate transparently. We've got a dedicated change and transformation team. Part of their role is to keep people abreast of all the changes in our organisation. They make sure that that is communicated effectively through mediums. With management monitoring, if we hear noise about a particular leadership style we absolutely do intervene."

Respondent 33: With management monitoring, if there is a problem, HC or senior management will get involved. With transparent communication, I believe there is enough justification and rationale given when changes occur. With retention metrics, I don't think that we use the data correctly, we have these interviews but the data isn't stored or used correctly to actually find solutions."

Respondent 34: "I think that organisation can be more transparent with how they communicate. With the retention metrics, we don't really understand the art of data analysis so it becomes very difficult to analyse."

Question 7:

What innovative methods would you recommend Old Mutual should consider to retain talented and scarce skilled employees?

The table below represents improvement suggestions.

Improvement suggestions
Respondent 2: "Tailor the employee experience or tailor a package based on what's important for that person. Do more with our data and analytics so that we can add that predictive analytics."
Respondent 3: "Old Mutual needs to spend time unpacking what the person's reasons would be for wanting to leave.
Respondent 4: "We need to introduce is the work life balance. Millennials now want to be able to do stuff from home and they'd like to see their career path and progression path."
Respondent 5: "Workday is a good start. We can do those surveys immediately to find out whether or not employees are still happy about being with the company."
Respondent 6: "We need to showcase this as a brand people want to be a part of so use the website to showcase the AWS piece or the hackathons."
Respondent 7: "Reward people for innovative ideas and give prizes and recognition for innovative ideas."
Respondent 8: "We should be looking at our offering. Learn to be more flexible with our offering. We also need to look at adapting more flexible work schedules."
Respondent 9: "Some sort of incentive for traveling. Travel has become so big for a lot of people."
also need to look at adapting more flexible work schedules."
Respondent 10: "Improve on compensation and flexibility."
Respondent 12: "Upskilling and re-skilling the current staff compliment, using the current staff and offering them the opportunities to become part of this new way of work."
Respondent 14: "A huge change in the reward structure. Employees to see more than just the TGP package."
Respondent 16: "We need to review the reward system. Review how we recognize people. Conferences and attending workshops shouldn't even be a retention method, it should be a part of our staffs development."
Respondent 17: "Definitely more flexible working hours flexible working situations."
Respondent 18: "Re-look at career pathing and clarifying progression paths for employees."
Respondent 20: "Immersions into different companies or countries is something that would be an innovative way of retaining talent."
Respondent 21: "In the sales environments, I do believe stress management training is core and should be an essential offering in how we keep people."
Respondent 22: "I know we trying to change our brand but we need to do more. We almost need to do like a Google revamp."
Respondent 23: "We need to refocus on our external brand."
Respondent 24: "It is about implementing consistent performance management, coaching, support, guidance, mentorship for those we deem talent and those that add value to the business."
Respondent 27: "Definitely more secondments, job shadowing and job rotations. Also talent needs to be organisational wide and not team wide."
Respondent 30: "We also need regular forums that actually brings together the top talent in the business and they are actually then creating a network of high potential people in the organisation."
Respondent 34: "The organisation needs to consider not having the performance management system that we have. The employees view it as force ranking."

What follows next is the final section of the interview guide that explores the impact of the talent management process on business.

Section E: Business impact

The following section provides the answers of the respondents to section E of the interview guide.

Questions within this section were dedicated to understanding the impact of the talent management process on the organisation.

Respondents answered three different questions as recorded below.

Question 1:

Has the Talent management process added value within your business? Use the rating scale below.

- Extremely effective
- Moderately effective
- Slightly effective
- Not effective at all

The table below represents the feedback.

Value add aspects
Respondent 7: "Yes, it's had a positive impact. Aspects such as the Accelerated Development Program that we run annually. It is good exposure for our high potential individuals. The talent review process also allows for us to identify key African talent which we then need to focus on and prioritise."
Respondent 12:" There is definitely some success stories. People that have moved up because of how this practice was applied. People that have better skills or a new job."
Respondent 17: "It definitely does add value. There have been some great people recruited and then developed into great roles."
Respondent 19: "For employees who have leaders who are really listening and are invested in their people, they drive performance and numbers but show an interest in the actual employee and their progression as well. These leaders then impact the business greatly."
Respondent 24:" Yes, I believe there are aspects about the process that adds amazing value."
Respondent 34:" I think it does add value when line managers actually use the process and view managing talent as one of their core responsibilities."

Non Value Add aspects
Respondent 2: "So the inputs we get for the talent management process is based on a conversation between line manager and employee. So if that conversation doesn't yield meaningful information. Then, there isn't really much we can do with the data. Also we do talent reviews. But the business looks at it like a tick box exercise. Like something they must do".
Respondent 4: "It's just not working holistically across the businesses."
Respondent 5: "We do this practice every single year without fail. We create profile details on whoever is deemed as talent but then for me it's like when these opportunities arise, then we don't actually remember those very people."
Respondent 8: "We have people working in silo's. There isn't really a specialist who focuses on improving our processes and look at what it is that we need and drive succession planning, drive the talent mapping or drive the development plans."
Respondent 9: "Talent is a tick box exercise and what they fail to understand is that part of the management role is actually to drive talent management with their teams."
Respondent 10: "In some areas it's more of a tick box."
Respondent 14: "I think the process is the same year in and year out. The organisation identifies high performers are who is really scarce or talented but little is done actively to progress or promote them."
Respondent 16: "I think it has worked but It's a just in time type of practice versus a predictive practice."
Respondent 21: "If we integrated it more, it could add more value. We do a lot of things in isolation, so the business experiences it like something disjoined."
Respondent 29: "It needs to move away from being that tick box process, we actually need to make it come alive in the business."
Respondent 31: "There is definitely gaps in the process and room for us to do things more automated and innovatively."

Question 2:
Has any of the following been negatively impacted by the current talent management process
- Financial position
- Brand reputation
- Time taken to go to market with innovative product or service offerings

The table below represents feedback in relation to adverse and positive impacts.

Adverse Impact
Respondent 1: "Definitely on the time taken to go to market. There is a major knock on effect for business. Imagine, someone leaves within a one-month notice period and we taking six months to fill that position."

Respondent 2: "It has impacted the financial position of Old Mutual because we have literally spent hundreds of thousands paying contracting houses to source for scarce skilled individuals in the market I'd say the recruitment process has hurt the brand, I have heard people say, you apply for a vacancy at Old Mutual and no one ever gets back to you."
Respondent 4 "It definitely impacted the time taken to go to market with goods and services. We take really long to land good people because of all the red tape and governance in our processes and then when they land and things change in the market, we don't train them to stay current and cutting edge."
Respondent 5: "There is a direct link between how long our recruitment process is and the time we take to have a bum in seat to do the work and add value or design a new product or service that can be used."
Respondent 8: "I think time to go to market is definitely negatively impacted, if you look at how long it takes for us to get the right skill set."
Respondent 9: "The brand might have been hurt by how they view Old Mutual after we take so long to get back to them. It hurts the candidates experience."
Respondent 10: "It's our own red tape and processes that pro-long the time taken for us to get hot talent."
Respondent 11: "Old Mutual is heavy on decision making and rather risk averse. Anything that's new, needs to go through a number of sign offs which is a long process. By the time we go to market, it's too late. Also, when we don't give feedback or keep people in the loop, our brand gets hurt."
Respondent 13: "It can take up to six months to land someone for a particular delivery which eventually leads to extra cost so it does impact the finances as well."
Respondent 14: "The brand gets impacted externally based on how people experience their recruitment journey with the organisation."
Respondent 15: "The red tape takes too long and by that time others have gone to market already."
Respondent 16: "We are slower than the competitors in the market because of our processes."
Respondent 17: "In the IT space or technology related business, there are people that are coming up various different things around how to engage with companies on buying a product. So if we lag behind, then we will definitely lose market share."
Respondent 19: "We take a long time to train the person to get to the level of making sales or generating value for the business and in that time, we lose money."
Respondent 21: "We take too long to offer the proper training for advisors, it has a direct impact on our finances and it's not great for a sales business."
Respondent 27: "It has definitely affected the time to go to market, those with scarce skills want to challenge the usual way we do things, the red tape is paralysing for them."
Respondent 28: "The financial position because in sales if you lose time, you impact money. Also, the time taken to train advisors, we don't have them offering the service the regions and making business."
Respondent 31: "It has definitely had an impact on the company's financial position and time to go to market. I mean, it cost so much money to constantly recruit people, constantly send them on training. The brand is strong but the system is letting us down. We can't engage with candidates."
Respondent 32: "When we constantly lose people, it impacts our time to service the market and how much business is generated."
Respondent 33: "The brand gets impacted negatively during our lengthy recruitment processes."
Positive Impact
Respondent 3: "I don't think it's majorly impacted our external brand or external financial position really."
Respondent 5: "I'm struggling to say the brand is impacted very negatively externally. Because most of these things, employees experience when they are internal to the organisation."
Respondent 12: "People externally don't really see the talent process for it to impact the brand heavily."

Question 3:
In your opinion, has the current talent management contributed to the loss of scarce skilled employees
The table below represents the feedback in relation to the impact being via the talent management
system or process.

System related
No reference made.
Process Related
Respondent 1: "We've have taken very long in comparison to other organisations. Such as Standard Bank, ABSA to get on the innovation bandwagon.
Respondent 2: "I have seen people leave after a few months, because what they experienced was not what was sold to them in the interview process."
Respondent 4: "I feel like the process requires major work. These scarce skilled employees should have a super employee experience."

Respondent 6: "I recall two recent senior scarce skill appointments. One lady, she is currently looking again externally as she feels like what the line manager sold her in the interview is completely different to what she is currently doing now."

Respondent 8: "Yes, most the scarce skills sit with the younger generation and our brand is not attractive enough for the younger generation."

Respondent 9: "We often loose African black top talent. There was a drive for ten African black females. The idea was that these black women would come on to this 18 month accelerated program and thereafter be placed into Operations Manager positions. Today, only one out of those 10 women are left at Old Mutual."

Respondent 11: "We need to get to the forefront of attracting and retaining those scarce skill people."

Respondent 12: " We really need to review all this long red tape processes and get better as an organisation."

Respondent 15: " I think our practices are good, yes there is a lot we can do better at but I think people leave for different reasons and I don't think this is one of the key reasons why."

Respondent 17: "I think we can do more with our processes, we need to look at how other organisations are approaching their talent."

Respondent 18: "The talent management process is very line manager subjective, so an employee can have the greatest skill or be regarded as top talent, if the manager doesn't rate the individual accordingly then the employee will be lost to another department, segment or externally."

Respondent 20: "The gaps in the process has led to the loss of people we needed and their skills to get us future fit."

Respondent 21: We have lost some really great people just because of bad leadership styles."

Respondent 22: "We have seen the impact to the business when really talented people leave. Leaders and HR need to act quickly, if they can see that a top talent is unhappy."

Respondent 23: "We need to be more proactive in our approach in finding the right people and then doing what keeps them happy."

Respondent 24: "We need to redefine our retention process. We need to look at what we can do better."

Respondent 25: "We can do more to develop our people and keep them here."

Respondent 27: "Yes, a lot of our process are line manager subjective. There are line managers that have not looked after a scarce skilled or talented employee and applied the process correctly then we lost them"

Respondent 29: "From a far the process looks smart on paper and PowerPoint yet I don't see the business actively driving it in the business. We need to make this process more dynamic for it actually to work."

Respondent 31: "The recruitment process is so long, people with those skills would find the process long and boring."

Respondent 32: "In the recruitment space, we take too long to find the appropriate resources, in the retention space, we not innovative enough with how we retain scarce skilled employees."

Respondent 33: "People with scarce skills get snatched up so much quicker in the market, so if we not doing more to retain them and keep them satisfied internally, it is so easy for them to find employment elsewhere."

APPENDIX F: GRAMMARIAN CERTIFICATE

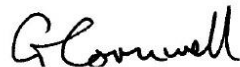# Epsilon Editing

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TO WHOM IT MAY CONCERN

This serves to confirm that the Master's thesis by Tasneem Abrahams (CPUT student number 210084057), "The disparity between current and required innovative talent management strategies at a selected in insurance company, Cape Town", has been proofread and edited to my satisfaction for English idiom and correctness of expression. The referencing has been checked against the CPUT Harvard standard.

Professor D G N Cornwell
(PhD, Rhodes University)