

A high-angle, close-up photograph of two business professionals shaking hands over a wooden desk. The person on the left wears a dark suit, and the person on the right wears a red blazer. The desk is cluttered with various business documents, including bar charts, pie charts, and spreadsheets. A calculator is visible in the bottom left corner. The lighting is warm and focused on the handshake, with a soft blue vertical line on the left side of the frame.

Breaking the Boundaries of Recruitment

A Systemic Approach to Talent Lifecycle Management

Talent Acquisition Expertise Transcends Recruiting

The Great Resignation, characterized by record quit rates, and the subsequent Great Talent Migration have put immense pressure on the talent acquisition (TA) function. In 2021, more than 47 million U.S. workers voluntarily quit,¹ nearly 30% of the country's workforce. The quit rate didn't slow down the following year, with more than 50.5 million U.S. workers choosing to leave their jobs in 2022.² These workers weren't just exiting the workforce or seeking better opportunities within competitor organizations. Globally, an estimated 48% of workers who voluntarily quit their jobs since April 2020 have changed companies and switched industries.³

As organizations shift to hiring for translatable skills that transcend industry lines, the barriers to making career changes have fallen significantly, drastically increasing the number of organizations that recruiters are competing with. Furthermore, with the continuous advancement of AI and other technologies, the landscape of workforce skills remains in flux and is changing faster than ever before. Between structural shifts in skill markets and the war for talent, it is estimated that, by 2030, more than 85 million jobs will be unfilled. This will result in \$8.5 trillion in lost revenue globally⁴ and make talent acquisition of external and internal talent a business imperative. Yet, as discussed in our report, *The Definitive Guide to Recruiting: Human-Centered Talent Acquisition*, we found that 74% of companies struggle to recruit effectively.

The organizations that are getting it right are completely rethinking talent acquisition. These "north star" companies are thinking outside the box of traditional recruiting and creating their TA strategies in a new, systemic ways⁵ that are integrated across all other areas of HR. They recognize the role of TA in work redesign, job analysis, internal mobility, professional development, and retention. They encourage recruiters to be

honest about the alignment between job scope and the talent market, positioning them as advisors for hiring managers and business leaders. Additionally, leading organizations drive talent transformations by enabling HR functions to speak with one another through a common skill-driven language. In these organizations, the TA function is not independently optimized but rather integrated into total talent strategies.

Companies that see TA as a competitive advantage empower the function with technology and integrate it into the business are 30 times more likely to engage and retain employees. However, the impact of systemic TA isn't just limited to people metrics. Organizations at the forefront of TA practices see much higher rates of innovation than their peers and are twice as likely to exceed financial targets. TA is ripe for reinvention, and it's time to break away from the concept that it is only about recruiting.

Where Should You Begin?

How are organizations jumpstarting their TA functions into a position of full-cycle talent advisory? Our ongoing Global Workforce Intelligence (GWI) Project revealed a systemic framework featuring our Four Rs: reskill, redesign, retain, and recruit (see Figure 1 on the next page).⁶

This approach is not a tactical operating model but rather an integrated operating system—and it is key to sustainably addressing talent challenges. A talent shortage is no longer only a recruiting problem, and turnover is not only an employee experience problem. In fact, such talent challenges are usually interrelated and require a strategic, systemic solution that taps the expertise of multiple HR teams to achieve long-term resolutions. Recognizing that relationships are one of the most important assets within an organization, a common theme amongst the top quarter of organizations excelling at TA is positioning HR teams to work as an integrated whole. This provides unprecedented visibility into the root causes of talent challenges and underscores an organization's ability to respond agilely. Sustainable people functions recognize that HR is no longer a siloed, transactional

1 "A record number of Americans quit their jobs in 2021," Anneken Tappe/CNN Business, February 1, 2022.

2 "2022 was the 'real year of the Great Resignation,' says economist," Greg Iacurci/CNBC, February 1, 2023.

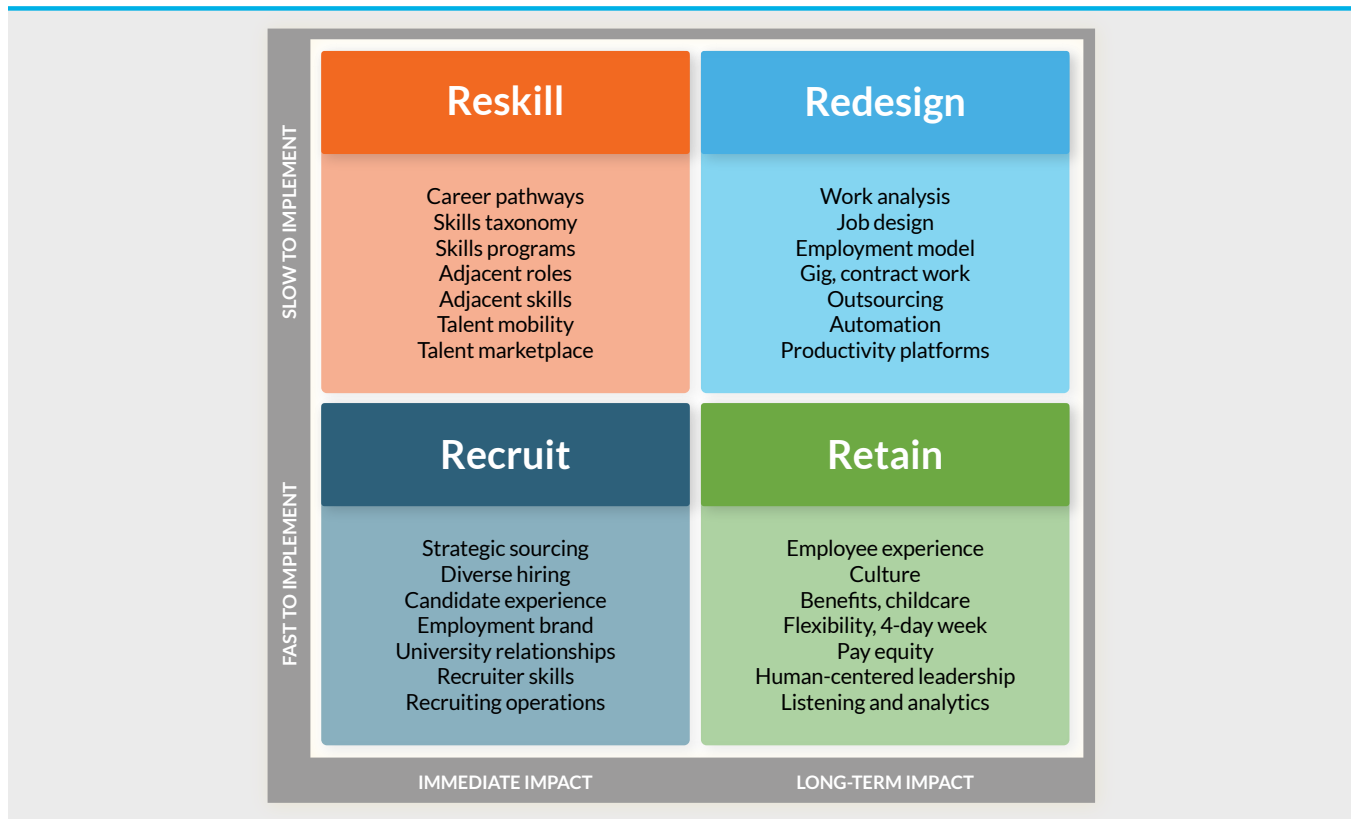
3 "The Great Attrition is making hiring harder. Are you searching the right talent pools?," Aaron De Smet, Bonnie Dowling, Bryan Hancock, and Bill Schaninger/McKinsey & Company, July 13, 2022.

4 "The \$8.5 Trillion Talent Shortage," Michael Franzino, Alan Guarino, Yannik Binvel, and Jean-Marc Laouchez/Korn Ferry, 2023.

5 "Redesigning HR: An Operating System, Not An Operating Model," John Bersin/The Josh Bersin Company, March 10, 2023.

6 *Healthcare at a Crossroads: Solving the Urgent Clinical Talent Shortage*, Josh Bersin and Kathi Enderes, PhD/The Josh Bersin Company, 2022.

Figure 1: The Systemic Four R Framework



Source: The Josh Bersin Company, 2023

service delivery organization optimized through reducing costs and maximizing employee experience. HR functions are stronger and more effective when enabled to create collective responses to talent and business challenges.

In addition to the importance of cultivating systemic, interconnected HR operations, one of our most striking findings from analyzing the TA practices of organizations is that only 8% are deploying emerging technology such as AI to improve recruiting practices. Furthermore, most tech implementations lack integrated solutions that enable crosstalk between HR functions. More commonly, they are disconnected, pinpoint solutions such as career site chatbots or external talent customer relationship management platforms that do not seamlessly unite with employee or job data.

Empowered by AI technology, innovative organizations embrace the TA function's potential as a cornerstone of talent lifecycle management. In this report, we examine three leading practices organizations use to move TA beyond hiring, reinventing it as an integrated pillar across the entire

employee experience. We also explore the impact of AI on the empowerment of TA. Rather than seeing the war for talent as a force putting pressure on TA, organizations unlocking business success drive multifaceted talent transformation strategies by viewing the function as a lever in redesigning, reskilling, and retaining initiatives.

Position Recruiters as Talent Advisors Who Support Work Redesign

Viewing TA as simply the hiring function equates recruiters to salespeople filling seats. While this role is important, it diminishes the enormous advisory capability of recruiters. Top TA staff understand the labor market, subtle candidate needs, and how the company's true employment brand is reflected in the marketplace. While many recruiters are tactical, we see an enormous opportunity to make their role strategic: promoting their title to talent advisor or similar.

There are important drivers for this change. Our ongoing conversations in our Big Reset initiative demonstrate that employers are searching for an effective way to navigate talent shortages, employee burnout, and the ongoing evolution of work. The answer is not as simple as tasking recruiting to amplify their search efforts, adapting the organizational culture, or reskilling workforces as technology reshapes work. Even if an organization innovates a collective recruiting, retaining, and reskilling strategy, a critical strategic element for maintaining agility—redesign—remains absent.

A fundamental principle of redesign (design of the job and the team) is enabling employees to operate at the top of their license through thoughtful organization, team, and role design. During the onset of the nursing talent crisis, multiple CHROs in the healthcare industry shared with us that many of their nurses spent 30% or less of their time doing nurse-level activities. Between scheduling, room cleaning, paperwork, and other tactical tasks, nurses were inhibited from prioritizing activities that leverage the strategic value they bring to

the organization, which resulted in budget and operational inefficiencies while negatively contributing to the nurse/employee experience. Amidst a critical talent shortage that couldn't be filled by recruiting, retention, and reskilling efforts alone, advanced healthcare organizations turned to redesign. Companies that invested in technology to transform the work of nurses and other supporting roles reduced their need for nurses by 20%, allowing them to maintain the level of care their patients expected with a smaller nursing staff while prioritizing the healthcare employee experience.

Recruiters are at the forefront of talent market information. Equipped with expert awareness of talent markets, they have valuable insight into the capabilities that are externally obtainable—knowledge that can help organizations proactively redesign their hiring strategies to minimize the impact of potential talent gaps. However, this knowledge often goes underutilized in Level 1 to 3 organizations on the TA Maturity Model, making the all-too-familiar cycle of transactional TA easy to fall into (see Figure 2).

Figure 2: The Talent Acquisition Maturity Model



Source: The Josh Bersin Company, 2023

The longer an employee's tenure, the more likely their position will have evolved to align with their specific skills, expertise, and interests. If a tenured employee departs from the organization, hiring managers will often submit a requisition to TA with unrealistic expectations that a recruiter will find a unicorn candidate who seamlessly backfills the role. When recruiters are not given the support to be talent advisors, they face a difficult challenge that will likely result in frustration and negative employee experience for all stakeholders, including the other team members linked to the open role.

However, when an organization positions the TA as a strategic partner equipped with internal and market-based workforce intelligence, recruiters can catalyze the redesign conversation. Rather than being backed into a corner while attempting to backfill roles at hiring manager requests, the TA function can be called upon to proactively advise on elements of work, job, and team design in support of strategic hiring choices (see Figure 3). A technology company we spoke with empowers its TA team with data on employees' skills and interests in short-term opportunities and full-time roles. This gives its

recruiters valuable insights, which can be used to design the scope of work before opening a requisition. Similarly, Sun Life, a Canadian financial services firm, invests in the capability development of its recruiters to position them as authorities of influence in requisition design and creation.

Empowering recruiters to have talent advisor influence is not just an investment in productivity or employee experience. We've discovered that companies that choose to invest in cultivating their TA staff's expertise on talent markets or the organization itself are 3.9 times more likely to be leaders in innovation and 4.5 times more likely to achieve high levels of customer retention.⁷ Furthermore, continuously developing recruiters is a high-impact practice that most of Level 3 and more than 93% of Level 4 organizations leverage to attract and recruit the right talent for the business. Level 4 TA functions are also creative, human-centered, and deeply integrated into the business.⁸ Redesign conversations at this level are a normalized collaboration between the recruiter and the hiring manager, enabling the organization to proactively identify and decide how to approach potential talent gaps.

Figure 3: Sample Questions from Talent Advisors to Hiring Managers



Work Design

- Have your team's priorities or responsibilities changed recently?
- Have technology innovations impacted the nature of your team's work?



Job Design

- Would a temporary position or gig opportunity best fit the needs of your team?
- Is a high level of autonomy critical to the role, or are there frequent collaboration opportunities to facilitate learning in the flow of work?



Organization Design

- Is your current team structure conducive to the work that needs to be done?
- Do we need to backfill this expert? Or is there more value in hiring for additional entry to mid-level positions that we can fill with individuals who will grow into the expert role?

Source: The Josh Bersin Company, 2023

⁷ ["Why to stem the recruitment crisis, companies need to develop a strong employee value proposition,"](#) Josh Bersin/HRWorld, August 4, 2022.

⁸ *The Definitive Guide to Recruiting: Human-Centered Talent Acquisition*, Josh Bersin and Janet Mertens/The Josh Bersin Company, 2022.

There are multiple strategies for normalizing redesign collaboration between the TA and the business. Some organizations will choose to develop the capability of all recruiters to hold work, job, and organization design conversations with managers. Others will find it most effective to distribute talent advising responsibility to senior recruiters, enabling this experienced population to vet positions that requisitions are opened for while allowing for entry and mid-level recruiters to focus on sourcing. Regardless of how an organization positions its TA function to advise on work, job, and organization redesign, the key strategic activities of talent advisors are the same (see Figure 4). Whether the activities are responsive or proactive, skills intelligence technology can enable effective crosstalk between TA, HR, and the business.

When organizations empower recruiters to leverage their knowledge of talent market supply and demand trends in an advisory capacity, TA becomes a strategic asset from multiple angles. It helps organizations confidently identify which skills and capabilities should be recruited or developed. In instances of high turnover in a particular role or a severe talent shortage, TA can alert the business of these indicators of redesign

needs. Fostering a culture in which recruiters are seen as talent advisors enables hiring managers to create better teams and employee experiences while allowing the organization to respond to talent market fluctuations with agility.

Leverage TA Insights to Reskill Talent with Internal Movement of All Kinds

The advisory role of TA doesn't stop at redesign. Our research shows fewer than a quarter of companies are proficient at internal mobility, or aligning internal talent to roles, projects, and tasks. Furthermore, in the past two years, more than 75% of companies have lost talent due to a lack of clarity regarding development opportunity. Therefore, it is no surprise that more than half of organizations say that their primary method of internal mobility is posting full-time roles on an internal-facing portal,⁹ not a broader strategy that transcends HR silos. Internal postings alone will not foster a culture of talent mobility or facilitate workforce skill transformations.

Figure 4: Key Activities of Talent Advisors

Responsive Activities	• Clarify the scope of work associated with a requisition • Have open discussions about which opportunity type best fits the scope of work (full-time, part-time, contingent, gig, project) • Encourage hiring managers to look for talent across the talent ecosystem, not just in external talent pools (internal employees, alumni networks, current contingent works, interns, etc.)
Proactive Activities	• Partake in total talent lifecycle conversations with business leaders regularly • Establish and communicate a companywide job structure with flexible job definitions • Ensure jobs are designed collaboratively between HR and the business • Create jobs with a high degrees of skill variety and opportunities for growth • Develop standards to ensure job descriptions are clearly defined, simple, and unbiased • Advise on cross-functional work design opportunities • Leverage a talent intelligence platform to note discrepancies between anticipated talent needs and internal/external skill availability • Connect with L&D to identify learning opportunities that will build needed skills • Advocate and uphold a culture of internal mobility • Educate hiring managers and business leaders on work opportunities other than full-time roles (part-time, contingent, gig, project) • Collaborate with Total Rewards for “pricing” the job or opportunity • Work with DEI to tap diverse talent pools

Source: The Josh Bersin Company, 2023

⁹ “The Imperfect Storm: How Skills are Transforming the Future of Work,” Beamery Team/Beamery, July 5 2022.

Beyond advising the business on agile work design, the TA function can continue to be a strategic partner in future-proofing the organization's collective skills through planning and facilitating advantageous movement across the organization. On average, the total number of skills required for a single job is increasing by 5.4% each year. Furthermore, 33% of the skills in an average job posting in 2019 will not be needed by 2024.¹⁰ Organizations need to undergo constant skill transformation to remain competitive. TA is already the expert at facilitating talent selection into available opportunities. Still, the function needs to be given a seat in skill strategy discussions within any organization seeking to be prepared for skill demand fluctuations.

Equipped with organizationwide talent data and external market trends, recruiters and TA leaders can conduct predictive skills gap analyses that provide immense value for

determining what reskilling efforts to invest in throughout an organization. This information is vital not only for training initiatives but also in curating growth and internal mobility experiences. In fact, when companies go beyond internally posting open positions to cultivate a culture of movement and growth, they are 3.7 times more likely to see innovation rise and nearly 5 times more likely to be recognized as a great place to work. Despite these benefits, our research revealed that only 11% of organizations promote a culture of mobility,¹¹ instead focusing primarily on planned mobility within a hierarchy structure rather than letting work design and reskilling needs direct the flow of movement.

Ultimately, there are three categories of internal mobility: planned, facilitated, and agile (see Figure 5). These methods are not equal in strategic value or impact, but TA can improve the strategic use of each.

Figure 5: From Rigid Career Ladders to Agile Mobility

Planned	Facilitated	Agile
- Linear career paths - Planned and managed - Functional in nature	- Vertical and horizontal - Facilitated, not planned - Based on aspirations	- On-demand and need-based - Able to change quickly - Gig- and project-oriented
Pros and Cons		
+ Easy to understand; modeled in job market	+ Supported by leaders; fits succession needs	+ Badly needed today; new model of work
– Long time to build; may become outdated	– Requires cultural shift; changes role of manager	– Demands new systems and new company culture
Processes Needed		
Development Planning	Development Coaching	Transparent Workforce Plan
Self-assessment; clear career goals	Self-assessment; purpose and direction	Development need; current passions

Source: The Josh Bersin Company, 2022

10 "Beamery Reinvents Skills-based Hiring For Better And More Dynamic Workforce Planning," Beamery Team/Beamery, February 22, 2023.

11 *The Definitive Guide to Recruiting: Human-Centered Talent Acquisition*, Josh Bersin and Janet Mertens/The Josh Bersin Company, 2022.

Planned Mobility

Planned mobility is the traditional internal mobility model characterized by upward, rigid career paths. With a focus on linear promotions, not lateral movement across teams or functions, the primary objective is movement between jobs within a business vertical. While this approach is still utilized across industries, it does not enable unlikely candidates to rise to the surface, and it is susceptible to manager bias. Planned mobility best suits circumstances in which skills, turnover, or job growth trends justify formal investment in vertical growth. However, it should still be leveraged alongside agile methods of internal mobility, such as projects or gig work, to maximize innovation and employee experience outcomes. Planned mobility should be leveraged only when there is strong TA data to support structured career progression.

Facilitated Mobility

Facilitated mobility expands upon the framework of planned mobility by integrating nonvertical moves and stretch assignments. It is commonly leveraged during inevitable, ad hoc development opportunities, such as when an employee exits the organization or temporarily goes on leave, leaving a hole to be filled. This model is less proactive than planned or agile mobility but is useful for transforming business-driven needs into development opportunities. Typically, facilitated mobility does not occur on a large scale, and depending on the selection process, this practice can be susceptible to bias. In some organizations, facilitated development opportunities are given based on who someone knows or simply to individuals on the team of the vacant seat. However, the fairer practice is to treat the selection process similarly to a traditional hire. An internal mobility platform can help streamline this process and mitigate bias. Furthermore, skills and workforce intelligence can be used to study patterns of mobility beyond job title changes and determine which moves have the highest potential for success, making TA an essential advisor for employee outreach strategies.

Agile Mobility

This new approach to (and the future of) internal mobility maximizes accessibility to experiences and creates a flexible organizational design model characterized by

empowered, collaborative teams that form around the work rather than a strict hierarchy of jobs and functions. Performance management centers on results rather than reputation, creating a dynamic and agile organization capable of adapting to consumer needs and interests. Often, employees work on multiple projects or even participate on multiple teams. While today it is common for people to move from project to project within their vertical, the concept of cross-functional moves is still new to most companies. As revealed in *The Definitive Guide to Recruiting: Human-Centered Talent Acquisition*, relying on a linear process to create an internal mobility culture is ineffective. A more agile approach closely linked to work design is better. This includes temporary roles, project-based work, rotational assignments, and internal mentoring, which can be offered strategically when TA partners with the business to determine what type of opportunity will best fit the work and then communicate that to the workforce. Making all internal positions and opportunities visible is a practice with a high impact on an organization being recognized as a great place to work.

Sun Life and the tech firm we interviewed have implemented talent marketplaces to match employees' skills to new opportunities, both within and outside of their current position or function. Sun Life views its internal talent marketplace for gig work as an investment in talent sustainability and employee potential. It provides workers with easy, transparent access to opportunities that allow them to try out new roles while expanding their skillset.

The tech corporation began its agile internal mobility journey by creating a talent marketplace for full-time roles. Today, it can fill 30% of openings internally. The success of this internal platform led it to partner with Beamery, a talent lifecycle management platform, to create a second marketplace for gig work and other project-based opportunities. This gives the organization's workforce of nearly 30,000 open access to information about short-term and long-term career enrichment opportunities, fostering a culture of mobility that aligns with the company's mission to help people "go anywhere, get anything, and earn their way." The corporation will soon merge its two talent marketplaces with the vendor to streamline communication of all opportunity types.

Retain Employees through the Internal Candidate Experience

Even when an organization's structure is designed to fit the work, and internal mobility is flexible enough to be agile with work design, TA expertise is still relevant beyond recruiting. In addition to supporting the alignment of redesign and reskilling strategies with skill and market trends, the TA function is an important evergreen lever for retaining employees.

The top reason employees quit their jobs between 2020 and 2021 was a lack of career development and advancement.¹² This perceived lack of career opportunity was not due to widespread oversaturation of skills or internal competition. In fact, 43% of organizations currently face skill gaps, and in the next few years that number is expected to rise to 87%.¹³ Aligning employees' desires for career progression cannot be resolved through having an internal mobility infrastructure alone. Even organizations with a robust, streamlined, agile internal mobility system must have accompanying strategies for addressing skill gaps, and TA leaders should have insight and influence over all of them.

The four primary solutions to preventing skill gaps include:

- Building skills
- Redeploying employees
- Hiring external talent
- Hiring contract or temporary talent

Twenty percent of companies identified redeploying current employees into new roles as the primary solution to addressing and proactively preventing skill gaps. Another 21% indicated that hiring external talent is their top strategy. This suggests internal mobility and external hiring are equivalent priorities. However, the combined percentage of companies that ranked building skills (53%),

redeploying employees (20%), or hiring contract talent (6%) as the top priority in the war for talent is 79%.¹⁴ Agile internal mobility has the potential to facilitate all of these strategies through project, role, and gig-based talent marketplaces. As discussed in the previous section, establishing an intelligent, streamlined, and fair TA process for all types of internal movement should be a foremost retention priority for organizations.

Since opportunities for advancement alone do not create an internal mobility culture, organizations like Sun Life recognize the importance of approaching recruitment and internal mobility with a relationship-based mindset instead of a transactional, check-the-box approach. Here are three high-impact strategies for fostering an internal mobility culture that spans the entire internal candidate experience.

1. Give employees access to career advisors who are separate from their managers. This is a high-impact practice for developing deep talent pipelines for all positions, regardless of whether those positions are full-time, part-time, temporary, or even based on a single gig-work assignment. Knowing the organization's positions, their related skills, and open opportunities, recruiters can be talent advisors to the business and employees. This strategy may require some initial investment in training recruiters to be career coaches. Expanding their role, offering a split role, or establishing a gig work system in which approved recruiters (and other employees) can coach employees is an investment in employee and the recruiter development. Plus, increasing attention to recruiters' employee experience and development is a key differentiator in Level 3 and Level 4 organizations on the TA Maturity Model (see Figure 2 on page 4).

2. Ensure that all candidates are given a fair and equitable opportunity in the application process. This may include leveraging a talent marketplace for broad communication and an AI solution to review resumes in a timely manner while matching candidate skills to openings. When leveraging AI, it is important to ensure that bias is baked out of the equation

12 "The Great Attrition is making hiring harder. Are you searching the right talent pools?" Aaron De Smet, Bonnie Dowling, Bryan Hancock, and Bill Schaninger/McKinsey & Company, July 13, 2022.

13 "Beyond hiring: How companies are reskilling to address talent gaps," Sapana Agrawal, Aaron De Smet, Pawel Poplawski, and Angelika Reich/McKinsey & Company, February 12, 2020.

14 "The Shortlist: Out Best Ideas, Quick and Curated," McKinsey & Company, March 11, 2022.

as much as possible. Here are several key questions to ask AI vendors when measuring the potential risk for bias:

- Has the AI model been audited?
- Is the data representative of the distribution in the real world?
- Are there data points that may cause bias, such as gender, race, and ethnicity?
- How is the data checked for bias before it is used for training AI models?
- How often is the data checked for bias?
- How much influence does the user have over the model?
- How do user interaction and feedback on the models impact the model training?

3. Track internal movement within the organization. Data collection is not just transactional. In fact, Sun Life recognizes that it enables TA to curate personalized interactions with employees. Keeping track of employee movements over time can illuminate patterns in successful vertical and horizontal opportunities. If integrated with performance management data, the organization can view more detailed analyses of the success of different types of moves. Alongside ensuring internal candidates are given fair and equitable opportunities in the application process, this practice has a high impact on attracting and recruiting the right internal talent for the right roles.

Take Control of Workforce Skill Transformations

Internal employees, external talent, alumni, contract workers, managers, executives—all these stakeholders are key players in a healthy and thriving talent ecosystem. However, what transforms HR practices such as hiring, employee development, and organizational design into talent ecosystems is not guided interactions between these stakeholders but rather integrating HR functions to enable intelligent and cohesive talent lifecycle management. As demonstrated previously, when recruiters are positioned as talent advisors to the

business, TA becomes a vehicle for identifying and clarifying redesign, reskilling, and retaining priorities. The war for talent is best addressed when the functions responsible for the Four Rs work as a unit to create a total talent ecosystem, and the language of talent ecosystems is human-centered AI, which enables crosstalk between HR functions through talent intelligence and a unified skills language.

Leverage AI to Build a Future-Fit Workforce

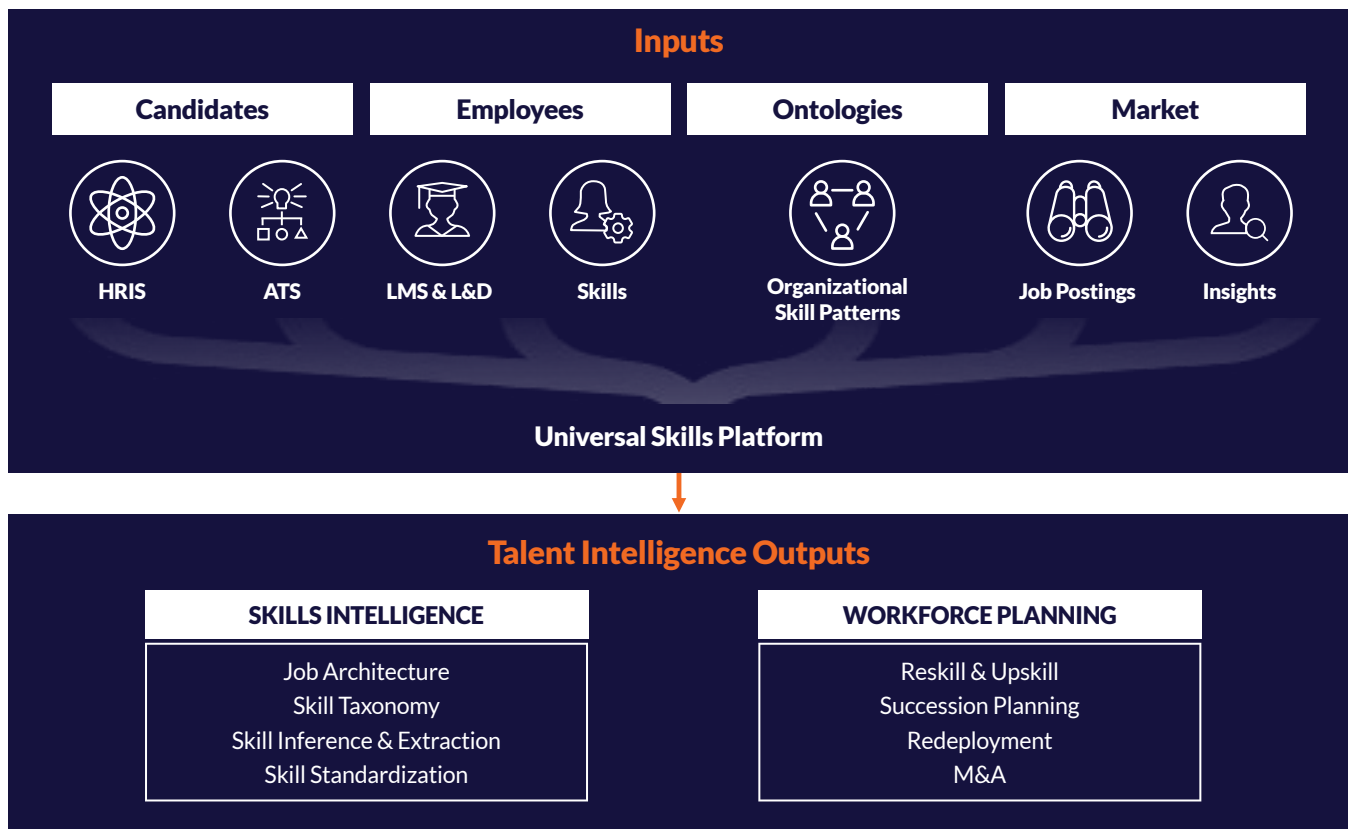
Our research not only revealed that 74% of organizations struggle to fill open positions but that less than 10% of companies leverage AI to power their TA practices. Furthermore, Level 4 companies are four times more likely to use an AI-powered platform to support their recruitment strategy, indicating that AI implementation is correlated with increased TA success.¹⁵

Our conversations with CHROs support this notion. They consistently told us when their organizations employ AI throughout the recruitment process, they are much more likely to improve their candidate pipeline, their recruiters have more time to talk with candidates (improving quality of hire), and they have much better tools to find internal candidates.

However, building a future-fit workforce requires more than intelligent recruitment alone. Organizations that break the boundaries of TA to build systemic people strategies focus on universal skills systems (which we call talent intelligence). These AI-driven platforms amass millions of profiles (employees, candidates, and external people) and can link many forms of data to assess skills, understand career paths, find successors, identify future skills gaps, and connect individuals to learning and mentors (see Figure 6 on the next page). For companies like Sun Life and the technology corporation we spoke with, this type of platform helps identify retention problems, assess productivity gaps, and develop skills through hiring, internal mobility, and learning—enabling, systemic, future-proofing skill transformations.

¹⁵ *The Definitive Guide to Recruiting: Human-Centered Talent Acquisition*, Josh Bersin and Janet Mertens/The Josh Bersin Company, 2022.

Figure 6: Universal Skill Platform Inputs and Outputs



Source: Beamery and The Josh Bersin Company, 2023

While transitioning from TA as a traditional hiring center of excellence to a strategic talent advisory service can be aided by implementing a universal skills platform; however, this isn't the only AI move organizations have at their disposal. Numerous AI solutions can kickstart or rejuvenate an organization's systemic HR journey. How can you identify the next right move for your organization?

Step 1: Identify your AI vision. The first step is to define what AI-empowered HR would ideally look like in the context of your company. What is your vision for AI in the next two to five years? Are you primarily interested in higher-quality recruiting, or are you looking for an end-to-end talent intelligence platform to help with internal mobility, succession planning, skills development, and organization design? How will this system interface with AI-enabled learning, employee experience, and even compensation systems?

Sun Life opted to adopt a suite of AI solutions over a few years to ensure a smooth transition for not only its people team but for employees and candidates as well. Now that ChatGPT is available, the company can consider where this tool fits in the architecture.

Keep in mind that your vision will dictate the type of vendor you seek to partner with or at least the solutions your company pursues. Smaller organizations, for example, may be primarily looking for AI to relieve administrative burdens. In that case, vendors offering basic AI-powered automation solutions (further explained in Step 3) will likely be a good fit.

However, if you seek to expand your organization's AI capabilities through deeply integrated solutions rooted in talent intelligence, you may want to invest in a partnership with a talent lifecycle management vendor. This type of vendor will offer solutions centered around a unified skills platform that leverages AI to meaningfully connect an organization's entire talent ecosystem—including contingent, alums, and referral talent.

The key difference between an automation vendor and a talent lifecycle management vendor is whether the technology is designed to be reactive or proactive. While an automation vendor may be able to take your career site to the next level with a chatbot that reacts to prospective candidate questions, a talent lifecycle management vendor can offer a suite of products that derive proactive insights—in addition to process automation and reactive services.

For example, the AI-driven HR tech stack at Sun Life derives talent leads and proactively builds talent pipelines, reducing its average time-to-fill to just 13 to 14 days. Ultimately, talent lifecycle management vendors empower companies to unlock an integrated common language based on skills, positioning HR functions to collaborate across function silos. See Figure 7 for examples of use cases of implementing a talent life cycle management platform powered by a universal skills language and talent intelligence.

Step 2: Know your data inputs and integration requirements.

Now it's time to determine your organization's readiness for an AI solution. The data your organization has to feed into a vendor's AI-powered solution will, in part, determine its value. Primary data considerations include:

- Is the data clean, structured, and free of duplicates?
- Is the data robust?
- Is the data up to date?

It is also important to take note of any existing platform in your HR tech stack that will need to integrate with your chosen automation or talent lifecycle management solution. Knowing your organization's tech stack compatibility requirements and the current state of your data inputs will inform the request for proposal (RFP) process and clarify the level of AI investment most appropriate for your organization.

Step 3: Evaluate the vendors. When comparing AI automation and talent lifecycle management vendors, there are four main AI levels to consider for each solution within your AI suite: basic, intermediate, advanced, and generative.

- **Basic AI** follows rule-based automation, such as an "if this, then that" model. An example would be a career site chatbot sending the link to an FAQ page in response to a prospective candidate's question or scheduling an interview for an applicant based on their availability and internal stakeholders' calendars. Outside of recruitment, basic AI can be used to determine whether internal employees meet the requirements of a reskilling program based on keywords parsed from their job description or profile. In all cases, basic AI is trained to automate processes through specific rules. At this level, the AI is incapable of personalized nuances unless nuances have been anticipated and incorporated into the AI's training. Furthermore, this basic AI is typically triggered by human interaction, such as a candidate or employee inquiry. It does not proactively generate insights.

Figure 7: Talent Lifecycle Management Platform Use Cases and Associated Outcomes

Use Cases		
Talent Acquisition	Talent Management	Workforce Planning
• AI-enabled sourcing and matching • Talent and alumni portals • Hiring manager hubs • Career sites • Events and campus	• Talent marketplace • Career pathing and internal mobility • Manager hubs • Mentorships and connections	• Reskill and upskill • Succession planning • Redeployment • M&A restructuring
Related Outcomes		
• Break HR silos • Build an agile workforce • Increase recruiter productivity	• Personalize the talent experience • Increase employee engagement and retention • Empower HR teams with AI	• Drive digital transformation • Discover untapped talent, skills, and capabilities

Source: The Josh Bersin Company, 2023

- **Intermediate AI** is a step above. Rather than strictly rule-based derivation, outputs are derived from an algorithm learning how to perform a task based on frequently updated datasets. Its algorithm will improve over time if fed accurate, unbiased data. Rather than simply using preprogrammed keywords to glean an employee's skills, an intermediate AI solution will infer relevant skills based on its evolving definition of a skill taxonomy. This level of AI can recognize patterns as it develops and emerges but may not be able to decipher the relevancy of an untraditional career path or detect language nuances. For example, an intermediate AI solution may recommend individuals with mechanical, electrical, or chemical engineering skills for a sales position titled sales engineer (see Figure 8). When the technology organization established its internal gig talent marketplace, it created a brief survey that prompted candidates to create a well-rounded skill profile. The ability of this talent marketplace to provide personalized recommendations to employees is currently based on intermediate AI. However, when the technology firm connects its applicant tracking system (ATS) and CRM to its talent marketplaces, it will unlock opportunities for advanced AI to provide personalized recommendations based on employees' complete talent profiles, not just the skill information they opted to enter.
- **Advanced AI** solutions are capable of mining insights by performing tasks using unstructured data, such as candidate resumes made from unique templates or employee talent data spread across databases. This AI solution will learn to identify relevant information without being prescribed rules or a clean dataset. For example, advanced AI can infer that the most translatable skills for a sales engineer role will be technical sales skills, not engineering expertise. This level of AI even demonstrates the ability to detect critical indicators of a candidate or employee's success that HR professionals may miss, such as soft skills frequently associated with certain roles or responsibilities but not explicitly stated on a resume or talent profile. The ability of Sun Life to derive leads and proactively build talent pipelines is based on its advanced AI solutions.
- **Generative AI** has been making worldwide headlines since the release of ChatGPT-4 in November 2022. This accessible and efficient learning language model uses statistics, reinforcement learning, and supervised learning to index words, phrases, and sentences from online books, articles, and other virtual text sources. While it cannot know what words mean, it knows how words are used, rendering it an effective tool for synthesizing information, answering questions, forming coherent arguments, and producing written assets such as contracts or blog posts.¹⁶ The use cases of ChatGPT-4 are already broadly applicable, but the next evolution in generative AI is training the technology for industry-specific applications.

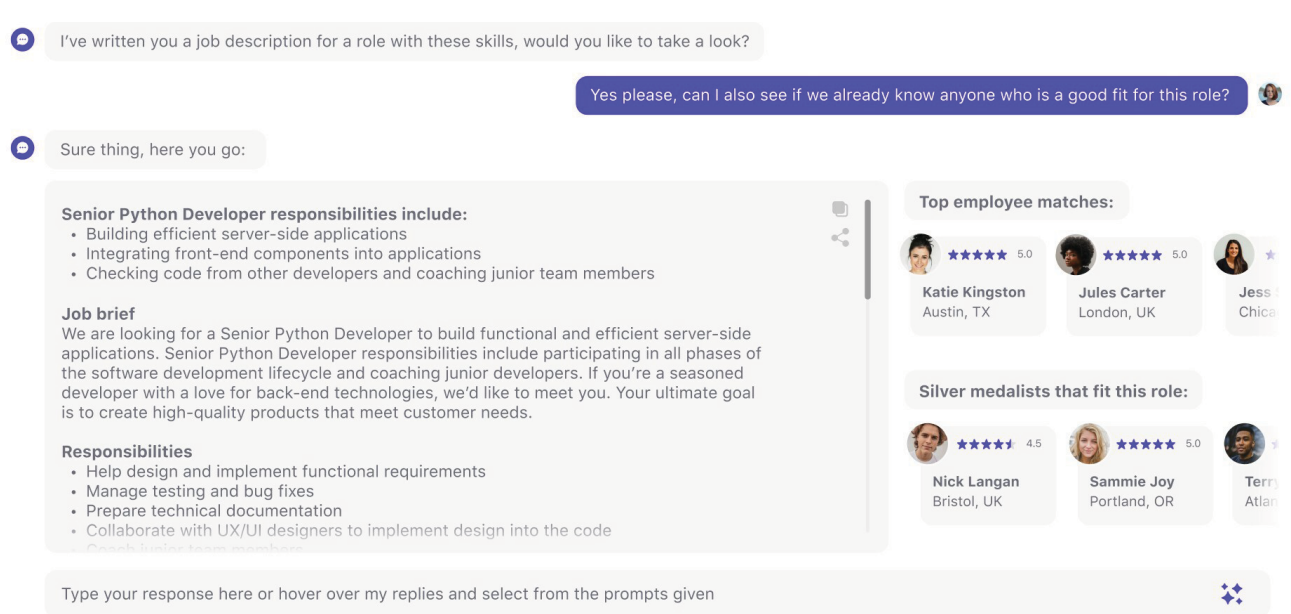
Figure 8: Functionality of AI Levels as Illustrated by Skill Intelligence Capabilities

Basic AI Skills as Keywords	Intermediate AI Skills "Taxonomy" based Inference	Advanced AI Skills "Title adjusted" Inference
Matching candidates on keywords: Look for a sales engineer and you will find people with exact keyword match for "sales" or "engineer" as skills or in their title	Matching candidates on inferred 'taxonomy' skills: Look for a sales engineer and you will find people with both technical sales skills, and mechanical or software engineering skills.	Matching candidates on job title adjusted skills: Look for a sales engineer , and you will find people with technical sales skills, not mechanical or software engineering skills.

Source: The Josh Bersin Company, 2023

¹⁶ "Understanding Chat-GPT, And Why It's Even Bigger Than You Think (*updated)," Josh Bersin/The Josh Bersin Company, , January 22, 2023.

Figure 9: Job Description Created through Generative AI



Source: Beamery, 2023

Just four months after the release of ChatGPT-4, the first generative AI tool for HR hit the market.¹⁷ AI is now poised to go beyond personalized recommendations—such as learning paths and open roles—to provide personalized experiences and services for employees, managers, candidates, and recruiters.

When generative AI is integrated into an organization's tech stack, it becomes an intelligent, user-facing productivity tool that bridges talent intelligence and business needs through a chatbot interface. For example, a single-prompt generative AI can use an organization's talent data to create a job description highlighting relevant skills and capabilities that have made high performers successful (see Figure 9). It can also engage employees in a dialogue about relevant career opportunities (see Figure 10 on the next page), providing guidance based on their current skills and the skills required for positions that interest them. Managers can also simulate traditionally difficult conversations by prompting the technology to respond from an employee's perspective.

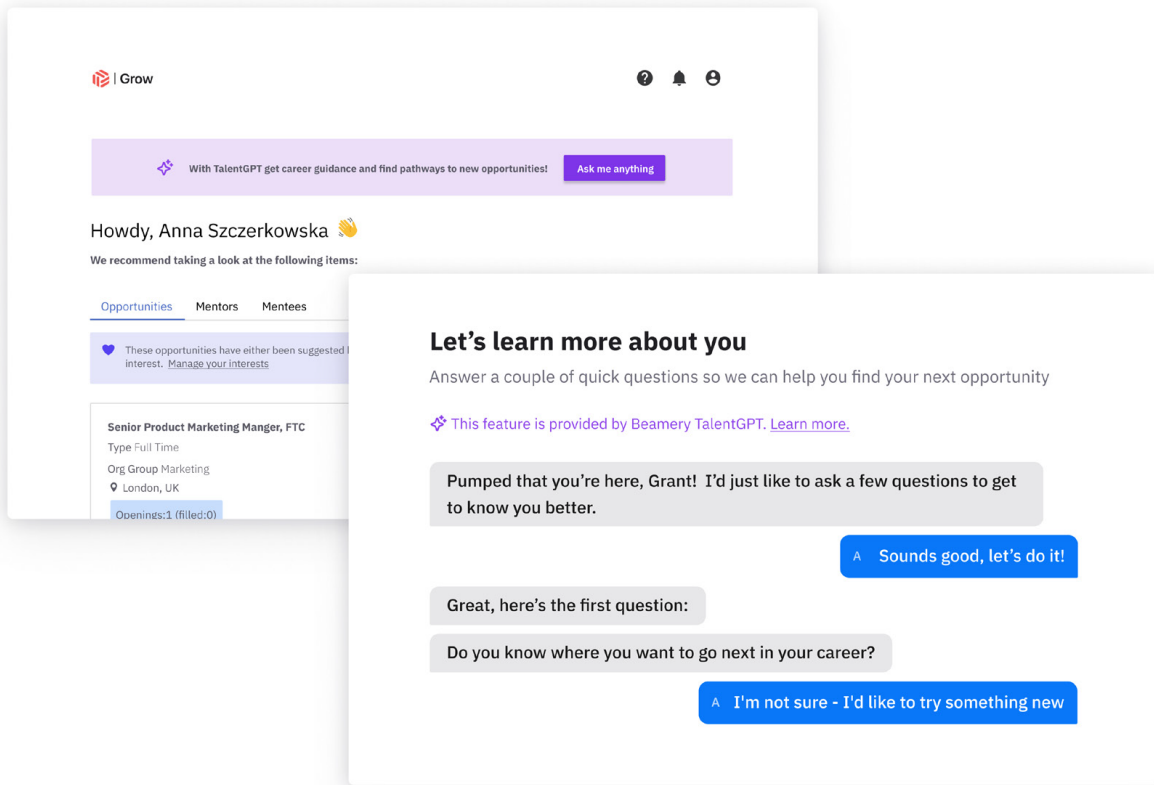
Through user-friendly, interactive dialogue, generative AI makes data-based insights accessible and tangible. Additional examples of generative AI applications in HR are provided in Figure 11 on the next page.

Basic AI provides automation that can reduce process time while improving candidate, recruiter, and employee experiences. Proactive skill insights from intermediate and advanced AI solutions are relevant across the talent lifecycle. Paired with a universal skills platform, AI solutions enable TA, HR, and business professionals to make informed, strategic talent decisions. Generative AI enables those insights to be put into practice through features such as written asset creation. While advanced and generative AI may appear to have the most inherent utility, the value added to any AI solution will be influenced by the quality and availability of data. A best practice is to select a level for each AI solution in your tech stack that aligns with your organization's vision and datasets. For more information and best practices, see our report *Understanding AI in HR: A Deep Dive*.¹⁸

17 "HR-GPT Arriving Now, Beamery Starts the Generative AI Revolution in HR," John Bersin/The Josh Bersin Company, March 22, 2023.

18 *Understanding AI in HR: A Deep Dive*, Josh Bersin/The Josh Bersin Company, 2023.

Figure 10: Professional Development Suggestions Enabled by Generative AI



Source: Beamery, 2023

Figure 11: Generative AI in HR

 Sourcing & Recruiting	 Learning & Performance	 Leadership & Succession	 Employee Experience
• Candidate conversations • Job descriptions • Job requisitions • Skills identification • Skills match • Antibias assessment • Candidate interviewing • Internal job placement • Career planning • Career development • Recruitment optimization	• Content assessment • Course assembly • Course outlines • Automatic quizzes • Process training • Compliance training • New system rollouts • Q&A chatbots • Guided journeys • Career guidance • New job onboarding • Transition onboarding • Legacy content management • Content discovery (LXP)	• Leadership coaching • New manager training • Leadership assessment • Succession matching • Activity analysis • Performance management • Recorded meetings • Analysis of work product • Financial analysis • Industry analysis • Productivity analysis • Code-writing	• Q&A databases • System simplification • Benefits enrollment • Leave and family journeys • Pay and rewards analysis • Pay equity analysis • IT trouble tickets • Knowledge management • Simplifying HR systems

Source: The Josh Bersin Company, 2023

Conclusion

With no clear end to the talent crisis, 26% of organizations still successfully identify and hire talent. These companies are experimenting with integrating AI-powered skills intelligence across their organizations and leveraging TA as a strategic advisor in redesigning, reskilling, and retaining practices. Key strategies for finding success in the talent crisis include:

1. Empower recruiters to say "no" to hiring managers, positioning them as talent advisors who consult with hiring managers on the most strategic ways to bring new talent into an organization.
2. Leverage TA's knowledge of emerging skills and job growth trends when evaluating internal mobility and experience-based reskilling options.
3. Give TA a stake in employee retention by setting the function up with tools to create an irresistible internal candidate experience primed for frequent movement between gig and full-time opportunities.
4. Use unified skills language to drive talent transformation. Seek deeply integrated AI-powered solutions that mine for insights and address touchpoints across the talent management lifecycle.

Leading organizations integrate TA into HR strategies using AI-powered talent intelligence.

Sun Life Transforms Candidate and Employee Experience with AI

Sun Life Financial, a global financial services organization headquartered in Toronto, Canada, aims to help clients achieve lifetime financial security and live healthier lives. It provides insurance, investment, financial advice, and asset management services in more than ten countries across North America, Europe, and APAC. The Sun Life team aims to make its impact far-reaching yet locally relevant. The same philosophy is applied to the Sun Life employee experience. The company aims to enable its 42,000 employees to be their most brilliant selves, which stems from a flexible workplace comprised of a plethora of opportunities and support to pursue a tailored path. This case study explores the AI journey Sun Life took to create an agile workplace.

In 2019, Sun Life was trying to solve how to create an irresistible candidate experience at scale. “We wanted to ensure that large candidate volumes didn’t result in us overlooking internal or external candidates who were not selected for a particular role but could be a tremendous fit for us in another,” shared Emily Schur, Senior Vice President of Global Talent at Sun Life. The company wanted to capitalize on opportunities to interact with its talent pool, recognizing that you can engage or disappoint at every touchpoint. Sun Life began listening to candidates through surveys, ad hoc recruiter feedback, and TA metrics such as the number of touchpoints candidates had with the company. The organization also captured hiring manager satisfaction and tracked promotion and movement to gain a more complete view of the employee lifecycle. “From this data, we discovered that we were approaching candidate and employee experiences from a transactional mindset rather than a relationship mindset,” shared Schur, “and we shortly thereafter developed a whole 360 set of objectives.” The three primary objectives are:

- Improve the candidate experience.
- Increase promotion rates.
- Develop recruiter capabilities.

Central to the goals surrounding improved candidate experience and increased promotion rates were creating

positive experiences that truly delight. To accomplish these aspirations, Sun Life knew it also needed to build the capabilities of its recruiting team and equip it with a platform deeply embedded in its processes. “We wanted to make sure that we had the right mechanisms to engage talent effectively and proactively,” stated Gerson Mendez, Assistant Vice President of Talent Acquisition at Sun Life. The company also sought a scalable solution with universal application across business groups and geographies.

With the organizationwide launch of a digital enterprise strategy in 2019, the global talent team had strong executive leader buy-in to explore potential AI platform solutions to integrate into its talent operating system and ultimately selected Beamery. This complete talent lifecycle management platform integrates directly with Workday, the people management system at Sun Life, and offers a suite of TA tools, including a CRM, that speak the same skill language. “We were able to leverage this integrated suite to drive process optimization and automation, enabling our recruiters to provide a better, relationship-based experience for all stakeholders,” explained Mendez.

With a suite of talent solutions, Sun Life set out to build talent pipelines to move away from reactively responding to requisitions as they come in. The company began engaging with talent through university events, diverse community organizations, and a variety of other channels, all the while bringing candidate traffic into its new CRM. The company also set out to provide personalized experiences to candidates it actively targeted and candidates who had become passive in the Sun Life talent ecosystem. In the two years since implementing the platform, Sun Life developed more than 500 pipelines. As the organization built up these databases, its AI technology began mining for insights to help recruiters identify the individuals in the company’s talent ecosystem that best match open roles and roles on the horizon. This solution is aiding the TA team in efficiently processing thousands of leads, including 15,000 leads in primary areas of focus such as data analytics and underwriting.

The integration of a total talent lifecycle management platform has enabled Sun Life to find success in a variety of process improvement initiatives. Candidate outreach has increased to more than 60%. This means that prospective candidates respond to outreach attempts more often than not. Furthermore, 11% of hires are proactively sourced, meaning that the hired candidate was already in the Sun Life talent ecosystem before recruitment started. This has lessened the cost of filling full-time roles and reduced time-to-fill, now 13 to 14 days lower on average. “We are in a very competitive market, and this reduction is significant,” shared Mendez. “The time we save could be the difference between securing a top candidate or losing them in the war for talent.”

Moving forward, Sun Life is going to continue to innovate alongside Beamery. “We are still thinking about what we can do next. There is so much more that we can do to promote delightful experiences and make strategic decisions,” stated Mendez. One area that Sun Life is prioritizing in the near future is expanding its use of the vendor’s CRM and other talent lifecycle management platform features to streamline the internal mobility experience of employees. “We want to support employees by offering career development opportunities throughout their employee lifecycle,” shared Mendez. Sun Life is leveraging integrated talent intelligence from recruiting to retention to build its talent ecosystem. ■

A Tech Corporation Fosters an Inclusive Ecosystem of Internal Talent Mobility

We spoke with a technology organization of nearly 30,000 employees, aiming to create a robust internal mobility experience for its employees.

In 2021, approximately 60% of the organization's employees were considered new hires. Amidst this influx of new workers, a robust, scalable, and equitable internal mobility solution was needed to cultivate growth across the company. The tech firm already had a generous relocation funding program to enable internal transfers. However, without a global system for permanent and project-based internal opportunities, there was a growing sentiment of unfairness in employees being shouldered. "Some managers didn't want to give up their talent," explained a director of talent mobility and immigration. As the company began to ask critical questions such as, "What should our talent ecosystem consist of?" and, "How will it work with various stakeholders across functional teams?" it knew that the solution would need to embody the organization's united culture, which recognizes that what the company offers is bigger than any one team. A formalized ecosystem for internal mobility would empower all employees to decide about their careers based on what is best for the company and themselves.

The company adopted a multipronged solution that addressed not only process and technology logistics but also the need to foster a culture of mobility. First, the organization built an in-house talent marketplace for internal, permanent moves. This platform enables all employees to search available opportunities by job level and specific teams, managers, and industries. Employees can also subscribe to roles of interest to receive notifications of openings, and once a role opens, the platform enables two-way communication between workers and hiring managers. Additionally, recruiters can nudge individuals to explore opportunities based on the interests they indicated on their profiles or the job openings they've recently viewed. To standardize this solution and make it equitable, the tech firm created a policy outlining requirements for different role changes. For example, relocating but staying in the same role has different checks and balances than changing functions or specialties. The policies were designed to promote

access to career mobility while ensuring that decision factors were standardized. The company also decided to expand its relocation funding to hourly employees as part of an initiative to support the mobility of its entire talent ecosystem.

Investing in an internal mobility ecosystem has yielded positive results. In the past three years, more than 30% of open roles at the organization have been filled internally. This is a significant increase compared to the years preceding the implementation of the organization's talent marketplace for permanent positions. Furthermore, more than 75% of employees search for internal opportunities on the platform. However, engagement in internal mobility prospects is not isolated to the permanent opportunities. Due to the success of the talent marketplace for permanent positions, the tech firm partnered with Beamery, a talent lifecycle management platform, to launch an internally facing talent marketplace for gig work, projects, and select part-time opportunities. "We wanted to unlock our internal talent profile," shared the director of talent mobility and immigration. Working with the vendor, the technology corporation created a customized profile template that was quick for employees to complete. This gave the company access to data about its workforce's skills within and beyond the profiles of individuals' roles. Since adopting this second marketplace for temporary and part-time work, more than 6,000 employees have created a profile on the platform. The engagement rate in both stand-alone platforms is no doubt favorable. However, to create a more seamless internal talent ecosystem experience, the company has decided to expand its partnership with the vendor and combine both marketplaces.

By bringing the two talent marketplace platforms together, the tech firm will unlock answers to questions such as:

- What skills do people have?
- Do they want to learn?
- What are their drivers?
- Are they interested in a new role?
- How do they want to work?

The vision, however, goes beyond talent marketplace integration. The organization strives to expand its partnership with the vendor to create a single talent management profile that integrates talent marketplace data with the vendor's ATS and CRM solutions. "Our goal is to unlock understanding of our employees' interests and goals through a connected experience across our sourcing, talent management, people technology, and learning HR channels," explained the director of talent mobility and immigration. Establishing a single profile will enable streamlined talent

lifecycle management while advancing employees' visibility into roles and experiences that match their skills, interests, and career goals.

Beyond advertising short- and long-term opportunities, the company has also invested in professional development to create a full-cycle ecosystem of talent development and mobility. This includes career path talent programs in select functions, internal academies, and investments in creating environments conducive to learning in the flow of work. ■

About the Authors



Josh Bersin

Josh founded Bersin & Associates in 2001 to provide research and advisory services focused on corporate learning. He expanded the company's coverage to encompass HR, talent management, talent acquisition, and leadership and became a recognized expert in the talent market. Josh sold the company to Deloitte in 2012 and was a partner in Bersin by Deloitte up until 2018.

In 2019, Josh founded the Josh Bersin Academy, a professional development academy that has become the “home for HR.” In 2020, he put together a team of analysts and advisors who are now working with him to support and guide HR organizations from around the world under the umbrella of The Josh Bersin Company. He is frequently featured in publications such as *Forbes*, *Harvard Business Review*, *HR Executive*, *The Wall Street Journal*, and *CLO Magazine*. He is a popular blogger and has more than 800,000 followers on LinkedIn.



Jordan Schmitting

Jordan is a senior research analyst at The Josh Bersin Company. Passionate about the intersection between behavioral sciences and the workplace, Jordan pursued a neuroscience degree before obtaining her master's in human resources and industrial relations from the University of Minnesota, Twin Cities. She is a certified HR professional and brings experience from multiple industries including commercial real estate, industrial process solutions, higher education, transportation, and retail.

The Josh Bersin Company Membership

The Josh Bersin Company provides a wide range of research and advisory services to help HR leaders and professionals tackle the ever-evolving challenges and needs of today's workforce. We cover all topics in HR, talent, and L&D. The Josh Bersin Academy—built on our research and powered by Nomadic Learning—helps HR practitioners grow key foundational skills. Our corporate membership program provides HR teams and senior leaders with the skills, strategies, and insights to build cutting-edge HR and people strategies through a combination of research, assessments, professional development, exclusive events, and community. In 2022, The Josh Bersin Company introduced the Global Workforce Intelligence (GWI) Project to guide market-leading businesses and their leaders through the challenges of industry convergence while remaining future-focused.

For more details, contact us at info@bersinpartners.com.