
Talent Leaders that grow businesses... drive Change!

Michael McNeal

Vice President Talent Strategy and Acquisition



- **Can challenge the traditional ways we talk about Talent Acquisition in service to business growth**
- **Discuss and debate the sensitive balance of effectiveness and efficiency**
- **Play with ideas of a future talent view**

Agenda:

- Talent Planning...Talent Management ...what do you mean...what do we need?
- How we balance effectiveness and efficiency.
- 10 years from now!

Intuit at a Glance

A leading provider of business and financial management solutions

- Founded in 1983
- Revenue of \$3.1 billion
- Traded on NASDAQ: INTU
- Employs more than 8,000 people
- Offices across the U.S. Canada, India, Singapore and U.K.
- Nearly 50 million people use our QuickBooks, Payroll, Payments, TurboTax, Digital Insight and Quicken products and services



Revolutionizing People's Lives... Solving Their Important Problems...

Creating Innovative Products and Services

intuit®

QuickBooks®

TurboTax



Quicken®

QuickBooks
Payroll

ProSeries®
The Tax Professional's Choice



Intuit QuickBase

LACERTE
THE FIRST NAME IN TAX SOFTWARE



Intuit Point of Sale



Vision: The Company We Aspire To Be...

To be a **premier innovative growth** company that improves **people's financial lives** so profoundly, they can't imagine going back to the old way

We serve these end customers

Consumers

Small Businesses

...and those who serve them

Accountants

Financial Institutions

Health Care Players

"Better Money Outcomes"



Financial... making & saving money, grow & profit



Productivity... turning drudgery into time for what matters most



Compliance... without even having to think about it



Confidence... from the wisdom & experience of others

Talent Planning ... Talent Management ... What do we mean?

Talent planning is about strategically forecasting the talent capabilities needed to drive growth.

Who owns this?

Talent Planning is owned by the Business Leaders as Talent Stewards, and is enabled by HR

... a generic Talent Management Value Proposition

What:

Trusted business partner driving the right talent, organization and change leadership decisions that accelerate business growth

How:

Assessment

Strategy

Influencing Design

Broker Expertise

Coach/Consultant

The Focus:

- ***Talent Management***
 - Understand talent needs of the business, assess talent, identify gaps
 - Partner on talent supply/sourcing strategy: acquire, develop, mobilize, outsource
- ***Organization Effectiveness***
 - Assessment and diagnosis, both short-term and long-term
 - Org design and structures that mobilize & maximize resources
 - Communication capability
- ***Change Leadership***
 - Leaders driving change
 - E2E change management approach aligned with our values and EVP
 - Employee Engagement...Leadership excellence in "people business"

The white board view: Trend Implication Details

Organizational Effectiveness

- Organization effectiveness
- Realization of our aspirations around innovation
- Productivity (performance and cost)

Choice and Customization

- Many choices (benefits, space, location, learning and development) → help with better, faster decisions
- Real-time decision support during MOTs
- For leaders real time decision support to get, grow, retain talent
- Provide E2E solutions for life events “ee” needs that are customizable while serving a diverse population

How We Work

- How we work - what is collaboration? How do we organize? Resource allocation?
- Multi-faceted collaboration, connection, community
- The “crowd” and how to use them to do HR?
- Provide visibility to opportunities
- Outsource vendor management skills
- “Virtual” management – how to effectively manage when not face-to-face
- Manage org “network” of employees like a social network

Role of the Leader

- Culture – what do we value? Role of leadership? Value prop?
- Communication of vision and leadership

Trend Implication Details

Talent Management... Acquisition and Retention

- Get, keep talent that's "right" for growth
- Concept of talent ownership
- Acquiring talent – how to have the right skills at the right time
- Identify and hire "skills"... from anywhere
- Help me find the best talent from the best source
- Multi-skilled global resource/talent pools - new TA
- Retaining key talent... risk of going to most innovative companies
- Just-in-time talent at all times

Easy... for Me

- Collaborative connections and tools
- Provide tools that make the transactions totally easy
- Technology
- Automate talent development and compensation
- I want it now and right for me
- HR as 24x7 and global

Insights to Help Me Decide

- Data driven
- Behavior driven
- Market insights
- Source for insights to drive better decisions and increase talent capability
- Information available through multiple channels – web, person
- Higher expectation on information of value
- Instant data... on anything with analysis insight
- Just-in-time insights to help any decision
- Use data to provide insights on talent
- Easier, faster, right data and insights

Change Leadership

- Change leadership... face of change and future talent needs
- Consult on org and business talent issues... the moments will still matter
- Successfully leading change (e.g., business outcome and employee engagement)
- Driving change fast enough to stay ahead of the market – fight organizational inertia

Trend Implication Details

Feed the Dog!

Rewards Customized for Talent

- Reward "talent"
- Talent: how to attract, reward, develop, engage, resource
- ROI-based compensation
- Reward "employees" – may be not on payroll

Global Talent and Culture

- Global compensation and succession
- How to have succession planning in a "crowd sourcing" world
- Global/cultural awareness training

Employee Engagement

- Retain talent and engage
- Engage "talent"

Variable and Flexible

- More flexible work arrangement requests
- How to keep a culture in this flexible workplace
- "Free agent" mobility contacts and tools
- Variable...
 - Pay based on outcomes
 - Benefits
 - Contracts
 - Workplace

But somewhere here is a reality

So where can we start?

Predictive Accuracy Measurements:

- How accurate are we in defining and assessing the type and quantity of future talent needs

Employee Success:

- Time to Productivity
- Quality of Talent - internal/external
- Quality of Assessment - enterprise

Talent Planning

Talent Planning experts work with business leaders
Current and historical hiring trends, external workforce demographics to predict future trends

Proactive

Building talent pools prior to need, healthy talent supply, assessment methodology, staffing plans connected to 1 yr business strategy, passive or communities as primary sources, name generation/profiling in ATS with strong search functionality, "People Experience" as our competitive advantage

Reactive

Requisition based sourcing, weak talent supply, no assessment method, tactical end-end delivery focus, no connection to business strategy, job boards as primary search technique, no passive or community talent, no name generation/profiling, in-house ATS with poor search functionality, no concern on the " Experience", full cycle recruiters

Quality of Acquisition & Development :

- Business Leaders
- Candidate Feedback-internal/external
- Time to Need
- Quality of Hire
- Quality of Process

Butts in Seats

- Time To Fill
- # of Reqs Filled
- Cost Per Hire

Talent Planning System

Process

Inputs

- BU/FG plans & strategy
- Internal and external business conditions
- Mindset & capability
- Resource allocation / health of business
- Internal talent assessment
- External talent landscape
- Existing / potential footprint / locations

Review the strategic BU/FG plans & priorities... determine strategic capabilities & organizational implications to drive business results & growth



Assess talent capabilities... What we have? What we need?



Summarize talent needs: What, where, and by when? Understand implications



**Evaluate all Possible Talent Strategies
...Acquire, Develop, Partner,
Outsource, Contract, Move**



Summarize and evaluate....feasibility, costs, & plan (current and future state) optimization ...the Plan

Outputs

- Multi-Year talent plan (incl. accurate people forecasts)
- Talent plan metrics
- Talent planning best practices
- Talent intelligence
- Talent planning capability

Outcomes

- Right talent, right place, right time & right investment
- Business Growth
- Leaders as talent stewards
- People growing their skills and careers
- Committed workforce

The Different Views for Talent Planning

Right Talent Deliveries View...

Finance View...

Budgeted headcount, Overall costs
Timing of costs

HRBP View...

HPOR, Perf. Mgmt, Org design, Growth
Capabilities, Training & Development

Manager & Bus. Leaders View...

Ops Mechs, Talent needs, Wish list

Talent Data Mgmt View...

History, Ext mkt data, Bat computer,
Turnover, Egmt scores, Scout, etc

Future View...

M&A, H2/H3, 3 year plans, brainstorm, etc.

Workplace View...

Costs, Efficiencies, etc.

SR. Most BU
leaders View...

- Business Strategy
- Revenue Projections
- Growth Estimates

What they needed:

Talent Management

- **plans**
- **scenarios**
- **forecasts**

What does it look like?

We partner across HR, Finance and the Business to:

1. Connect growth plans and talent

- Understand business strategies, talent strategies and plans

2. Assess current and future talent gaps

- Internal and external talent data, (attrition, mobility, talent availability)
- Skills and capabilities
- Resources / headcount \$\$\$

3. Develop talent scenarios and actions plans: Build, buy, partner, etc.

4. Aggregate, Manage, measure plans

- Make talent implications and decisions visible

Intuit PD Talent Direction			
What's Important: Critical 3-5 skill/capability needs in next 1-3 years	How you're doing: Where you have gaps; Key shifts talent/capability you'll need to make in next 3 years	Priorities to Improve: Strategy/actions to accomplish shift (e.g. develop, hire, mobilize, contract, etc.)	
1) Technical Skills...connected services, mobile, social	<ul style="list-style-type: none"> • Precariously low mobile skills; outsourcing most development • Growing connected services skills, but not fast enough • Light on social and data skills • Tough attracting exceptional talent with mobile, social, data skills • Security underrepresented 	<ul style="list-style-type: none"> • Build in-house mobile expertise: leadership, industry savvy and development; hire external • All external hires to have mobile, conn, svcs, social or data skills regardless of the role • Engineer mobility for skills distribution • Improve external engineering brand • Focus on developing security talent and skills 	
2) Capability and mindset to innovative... customer centricity, ability to find big ideas, iterate quickly, leverage small teams, act with speed and agility	<ul style="list-style-type: none"> • Primarily look internally to innovate • Innovations primarily smaller ideas • Need to learn how to see & execute on big ideas, possibly cross-BU 	<ul style="list-style-type: none"> • Increase innovation techniques capability • Drive innovation from external entities • Engineers who are collaborative design thinkers and technically capable designers 	
3) Global mindset... Capability to work globally, think globally, build globally	<ul style="list-style-type: none"> • US first most of the time • Mindset shift: Global is everyone's responsibility 	<ul style="list-style-type: none"> • All new offerings built to be global • 30% of PD in India over time 	
4) Management Skills... technically current, developers of great engineers, can work across businesses & functions	<ul style="list-style-type: none"> • Uncertain of technical currency of managers...need to diagnose, or whether it's a reasonable expectation for mgrs • AES survey indicates variation across managers 	<ul style="list-style-type: none"> • Get shared vision on technical and leadership expectations of managers, diagnose how they're doing against those expectations, hold accountable to improve • Succession planning 	
PD Talent Mix	Current State	Where you'd like to be in 3 years	Strategy/actions to accomplish shift
Skills Mix... connected services, social, data, mobile	Desktop, Growing SaaS capability	Need significantly more mobile, social and data skills.	<ul style="list-style-type: none"> • Focus all non-college hires on mobile, social or data (and to a lesser extent design, etc.)

talent strategies declared and aggregated...3 year outlook

GAP: link between strategies and plans

Manager Hiring Behavior

<p><u>Current State:</u></p> <ul style="list-style-type: none"> • Technical skills, (e.g. Flex, ruby) moving from desirable to required • Requiring more experience & leadership with each hire...(e.g. customer focused SaaS company) • Bias toward what's needed for today...replacement 	<p><u>What we want:</u></p> <ul style="list-style-type: none"> • Specs that reflect new PD talent direction (e.g. mobile) • Higher prioritization of technical skills • Seek out and assess aptitude for vs lots of experience
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Get better alignment between talent direction and talent decisions

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 - Skills and capabilities
 - Resources / headcount \$\$\$
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Intuit Data and Trends

Talent Planners' Forecast- Feb Roll-up- FY2010						
All Intuit Hiring	SLT	DIR	LEC	SRP	PRO	Total
Q1 Fcst	3	10	85	132	315	545
Q1 Actuals	1	7	85	155	315	563
Q2 FCST	4	18	123	153	279	577
Q2 Actuals	1	9	78	148	378	614
Q3	3	8	68	81	108	268
Q4	0	4	41	76	123	244
Total	5	28	272	460	924	1689
Oct Forecast	6	31	279	457	821	1594
July Forecast	8	38	275	425	800	1546

INTU Q1/Q2 hiring accurate, BU/FG & by level not as accurate

Data and Trends

- **Mobility (Int Fills up 50% vs 36%FY09)**
- **PD Hiring***

BU/FG					YTD (3/24)		
	FY08	FY08 %	FY09	FY09 %	FY10	Ttl	FY10 %
APD	19	5%	34	11%	28	94	30%
CG	61	17%	89	17%	116	416	28%
CTO	37	93%	27	87%	45	48	94%
GBD	79	27%	58	29%	11	77	14%
IFID	39	15%	19	17%	12	65	18%
IIT	23	26%	32	25%	43	117	37%
QHG	9	82%	5	50%	1	3	33%
SBG	311	27%	198	26%	83	324	26%
Total	578	20%	462	21%	340	1464	23%

FY09 vs FY08 Trends

By level:
 LEC up 20%, SRP and PRO down 20% and 33%

By location:
 Increased: India 41% & SD 20%
 Decreased: Mt View 50% & Calabasas 76%

By org
 Increased: CG 46% & IIT 40%
 Decreased: SBG 36%

How will you know you're successful?

Milestones for Talent Planning:

- **You are able to influence and build your business leaders' understanding and ownership around talent planning.**
- **Your leaders are aware of what talent planning really is and how it may be different and/or complimentary to other talent activities they do today.**
- **Your leaders have a compelling point of view about talent planning and their ownership role as talent stewards.**
- **Your leaders are engaged and holding talent planning discussions. With your leadership and support...you see v1 talent plans emerging.**
- **Discussions and decisions around talent plans, actions, and results are explicit and ongoing.**
- **Leaders are actively managing and executing talent strategies with leadership and support of HR.**

Outputs

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Talent Planning Leaders *drive* the Outputs
HR Organization *enables* the Outcomes

Balancing Effectiveness and Efficiency

How we... Deliver

We deliver awesome candidates and facilitate a great experience:

1. **Develop hiring strategies from talent plans**
2. **Generate and assess candidates**
3. **Make competitive offers...leverage brand**
4. **Partner to onboard**
5. **Manage and measure outcomes and resources**

Candidate Experience: World class **candidate** feedback
...94% fav satisfaction

Assessing for growth leadership is a core competency

- **Progress on competencies and skills helping us pre-screen and assess against the future targets**
- Continued progress in building manager capability to assess, resulting in fewer interviews:hire
- Manager feedback...YOY increase, but trending down FY10

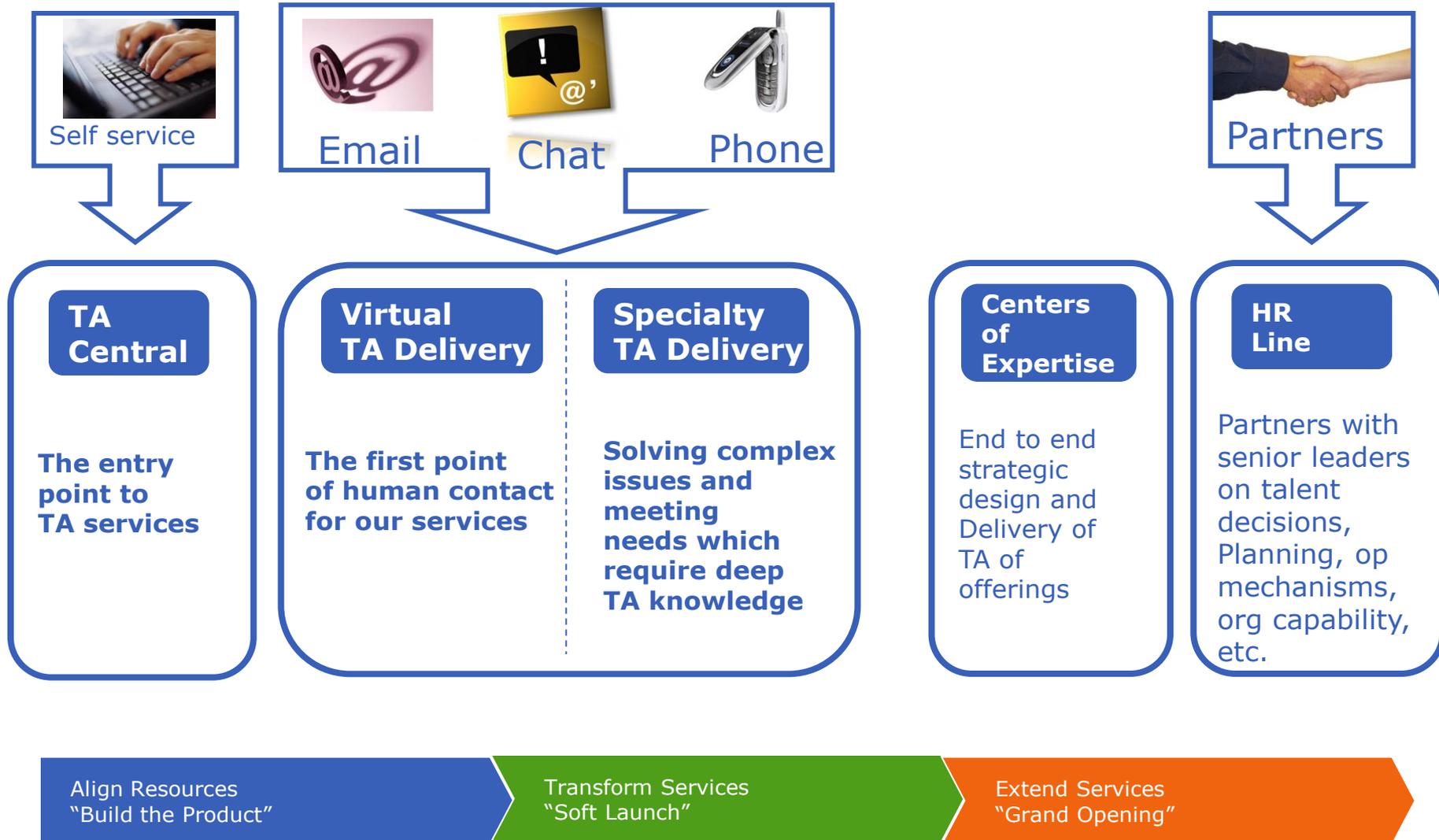
Execute best practices and processes

- Delivered 106% to plan Q1/Q2.
- Time to offer accept continues to decrease
- 20% reduction in Right Talent Delivery resources YOY

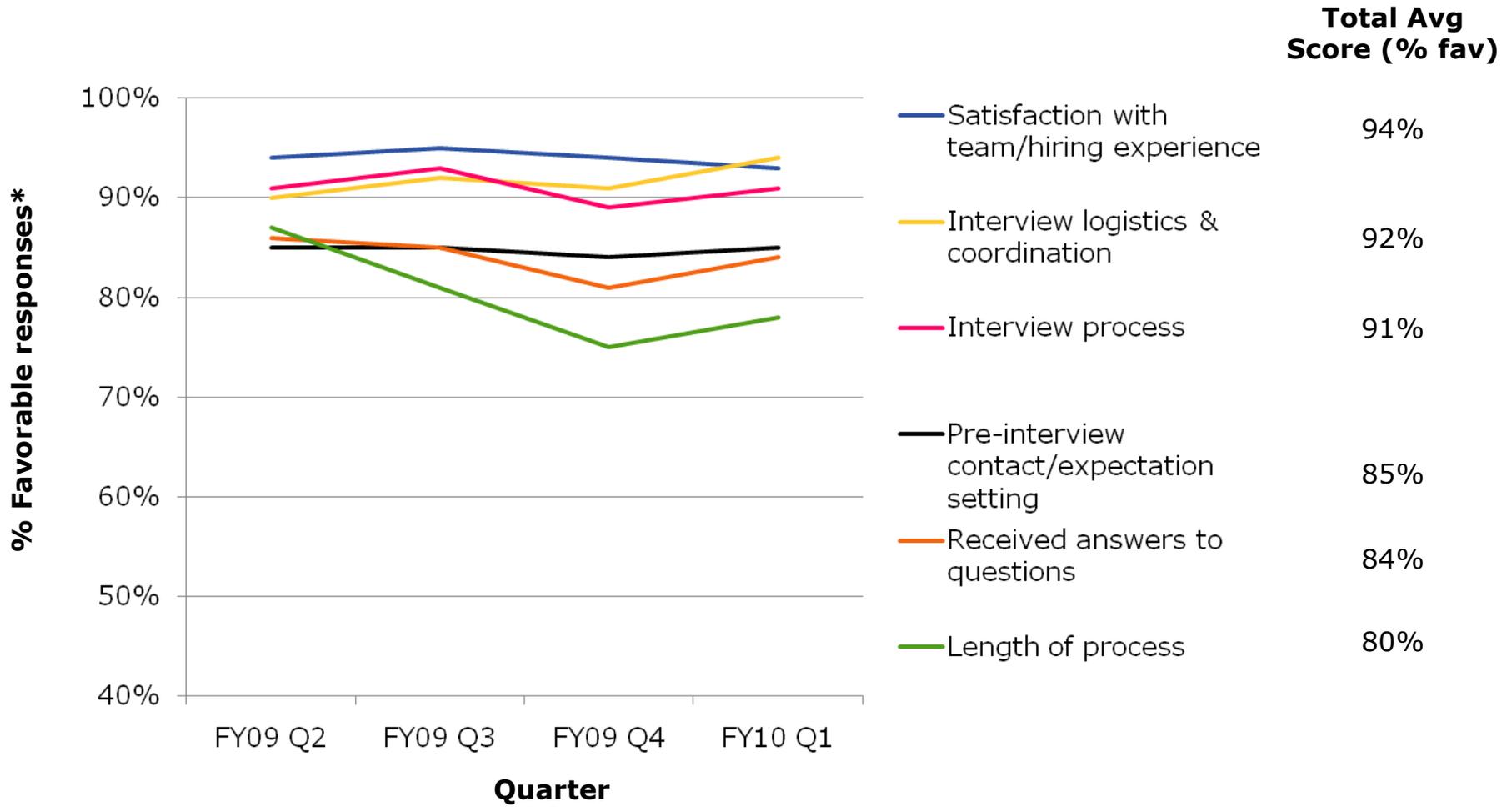
We scale and quickly adapt to internal and external dynamics

- Outsource ratio from 80:20 to 70:30 FTE
- Decrease in time to effectiveness for flex workforce ~2mo to 3 weeks

Talent Acquisition Transformation – Effectiveness AND Efficiency



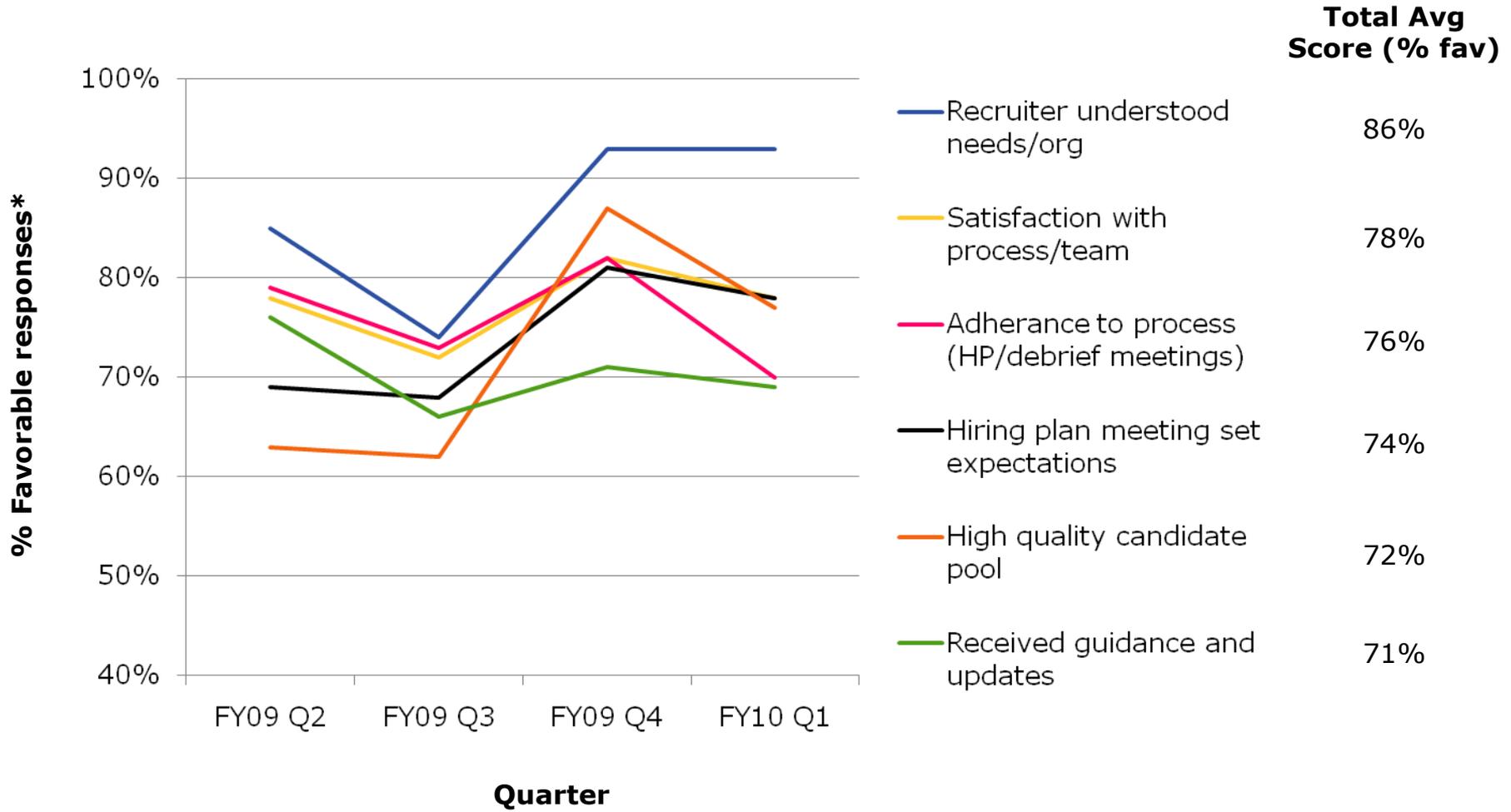
Trends: New Hire



*Sample size = 434 new hires starting November 2008-October 2009. Includes all global hires, excludes CCR hires

*Favorable = % of new hires that answered Agree or Strongly Agree

Trends: Hiring Manager



*Sample data = 113 managers who hired employees November 2008-October 2009. Includes all global hires, excludes CCR hires

*Favorable = % of managers that answered Agree or Strongly Agree

Fortune Top 100 Places to Work



Most Admired: Software Industry

7 Years in a row

2004 2005 2006 2007 2008 2009 **2010**

The logo for Fortune magazine, featuring the word "FORTUNE" in a large, white, serif font on a dark blue background.

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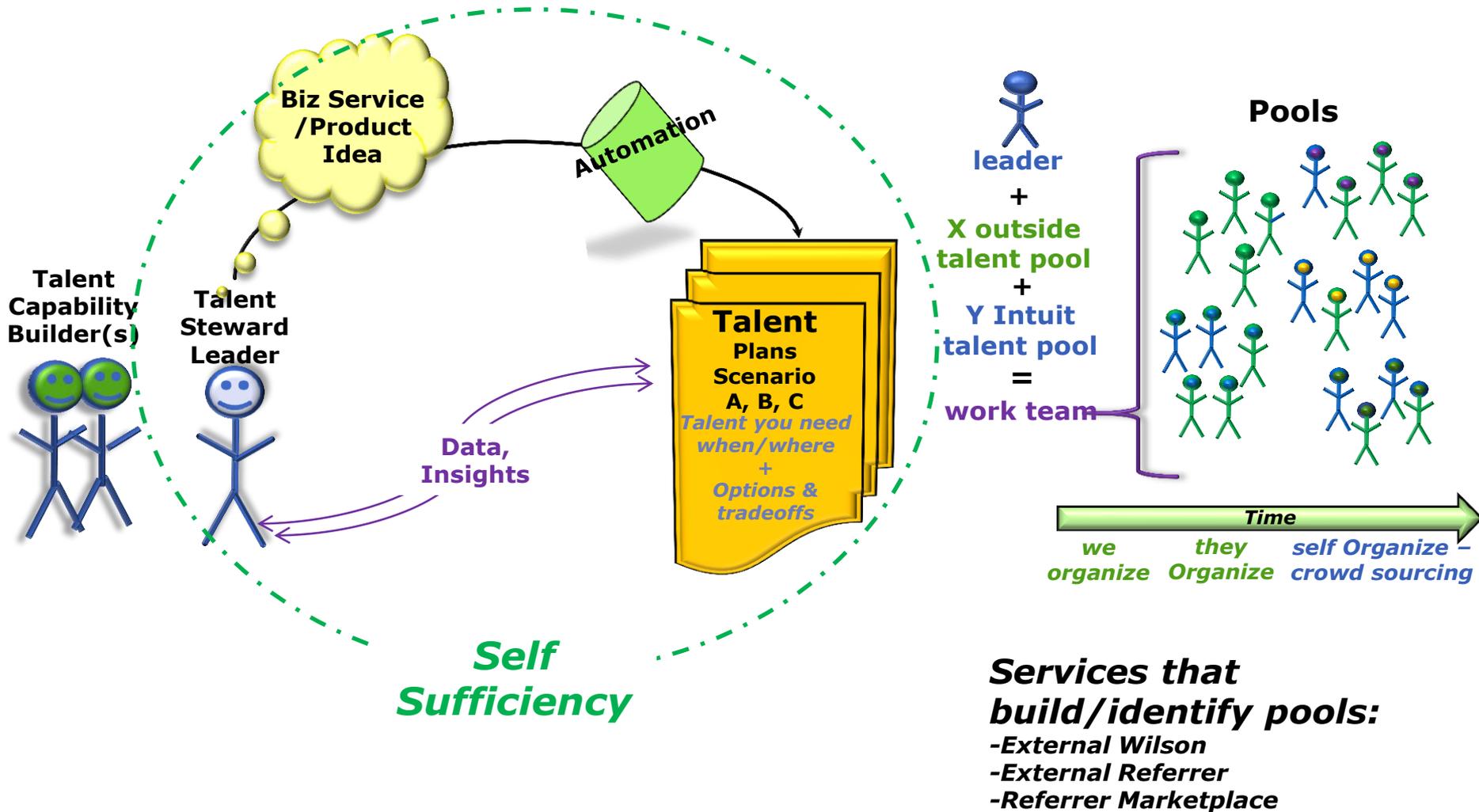
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WORLD'S MOST ADMIRABLE COMPANIES

10 Year Vision... 5 Year Strategy... 1 Year plan



Thank You Very Much!!!!

Now go drive Change!

