

Managing Rapid Growth with Integrated HCM Technology

Northgate González Markets Implements a Talent Management Solution to Enable Growth and Efficiency

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January 2014

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▶ IN THIS CASE STUDY

A rapidly growing organization must often devise new systems and strategies to operationalize and scale its success. Northgate González Markets faced this challenge as the organization expanded from 2,000 to 5,000 employees across 40 stores. For an organization with a focus on rapid expansion, a targeted and growing customer market, and a preference for developing leaders internally, having the right tools in place to speed both administrative and strategic talent tasks was critical. However, Northgate had historically done much of this work manually or through unsophisticated technology programs.

In this case study, we:

- Explain Northgate González Markets' HR and talent management needs, which included:
 - Improving the company's payroll, hiring, onboarding, and performance management processes
 - Scaling the payroll and hiring processes to enable stores to open more quickly
 - Capturing employees' performance goals and tracking progress
 - Providing user-friendly technology for use by individuals of all generations

- Offering the technology tools expected by the younger generation and leaders of tomorrow
- Building a talent pool of people with the potential to move up
- Describe how moving to a single software solution with HR, payroll, recruiting, onboarding, and performance management capabilities helped Northgate execute its growth plan
- Explore how Northgate implemented its human capital management (HCM) solution
- Examine the benefits Northgate achieved from a single technology solution 



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Company Overview

Northgate González Markets is a privately owned family grocery business. The company, owned and operated by Miguel González Sr. and his family since 1980, sells groceries and offers services targeted at the Hispanic population. Northgate’s reputation for customer service, products that remind customers of their native countries, and the use of Spanish (in addition to English) within the stores has resonated with customers. Since 2008, the company has experienced 100 percent growth in stores, opening an average of four new stores each year. The company is currently operating in three Southern California counties—Los Angeles, Orange, and San Diego—where the Hispanic population has grown by more than 20 percent since 2000.¹ The company has stores in 40 neighborhoods and a workforce of approximately 5,000 people, with a strong pipeline of employees and future leaders who can help open the next round of stores (see Figure 1).

Figure 1: Northgate González Markets at a Glance

- **Year Founded:** 1980
- **Locations:** 40 stores in three Southern California counties
- **Workforce:** Approximately 5,000
- **Headquarters:** Anaheim, California

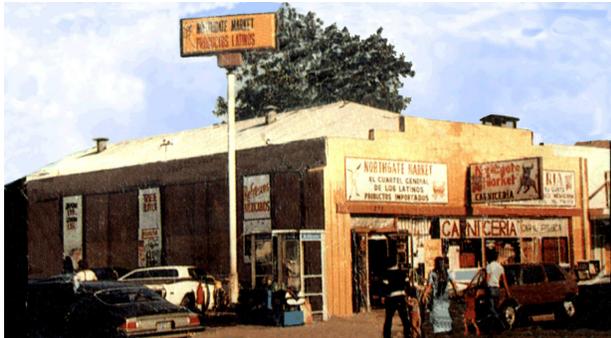
Source: *Northgate González Markets, 2014.*

Business Environment and Challenges

Northgate González Markets has grown rapidly, opening an average of four stores per year each year since 2008, while also managing the integration of the El Tigre Markets grocery chain. Today, each Northgate store is about 50,000 square feet in size (see Figure 2). Northgate leaders plan to continue expanding by delivering excellent customer service, catering to the preferences of neighborhood customers, and building on the success of each store. In the years ahead, even more extensive growth is planned.

¹ Source: “Latino Populations Are Growing Fastest Where We Aren’t Looking,” *NewsWire*, Nielsen.com / The Nielsen Company, May 1, 2013, www.nielsen.com/us/en/newswire/2013/latino-populations-are-growing-fastest-where-we-arent-looking.html.

Figure 2: The First Northgate González Markets Store and the Look of Stores Today



Source: Northgate González Markets, 2014.

By 2009, the company’s rapid growth was becoming increasingly difficult to manage using its existing processes. Northgate’s leaders recognized that the organization would need to evolve these processes to become more scalable. However, despite the increased scale, these leaders would need to maintain or even increase their insight into the company’s operations and talent. The increasing complexity of the company required a much more complete picture of both the business and people of Northgate, and this picture was being heavily obscured by manual processes or missing data. Obtaining this enterprisewide view would be especially challenging in the decentralized environment of a chain grocery store business.

“Many other grocery stores are run very centrally, which means store folks are implementing a centralized approach from corporate. At Northgate, we recognize a genuine customer experience comes from the autonomy to design service levels that meet local needs, so we try to give more autonomy and leeway to individual stores. We want to empower employees and managers to do what is best for their communities.”

—Vice president of HR, Northgate González Markets

Talent Strategy and Challenges

At Northgate González Markets, successful employees know that they must embrace both the organization’s entrepreneurial service culture and the local market in which the store operates. Northgate’s leaders believe that having employees with entrepreneurial service values puts the company in a position to develop internal talent who will become future leaders.



KEY POINT

Northgate needed to manage its rapidly increasing workforce more efficiently without losing sight of critical business and talent information.

Any organization that focuses on internal promotion needs a strong pipeline of leaders—and this was certainly the case at Northgate. However, the need for a strong pipeline was even greater at Northgate because the company’s rapid growth required moving leaders from old stores to open new stores while also having new leaders ready to take over the older stores. Further, the new leaders at the older stores had to deliver the same level of customized service as those who had just left. This model requires a very deep bench of leaders at the store level. Unfortunately, Northgate lacked a scalable way to access even the most basic information on its leaders, representing a potential hindrance to growth.

“Growing at a rate of three to five new stores per year, with 50 to 250 new people in each store, requires building a good pipeline from within for our critical roles.”

—Vice president of HR, Northgate González Markets

To address these challenges, Northgate’s HR leaders first decided to seek out human capital management (HCM) technology that could help them with screening for potential leaders, onboarding employees, assessing employees, and developing leaders at the pace required to keep up with the company’s growth plans. However, hiring and retaining employees in the retail industry can be challenging due to factors such as changing demographics and educational levels.² In addition, Northgate had to find a technology solution that would flex with the organization’s environment, culture, and diverse needs. Specifically, Northgate needed to find a technology solution that could be adapted to its multigenerational (ages 16–80), multilingual (English and Spanish), highly distributed (40 store locations) workforce.

HR Organization

Northgate’s corporate HR organization (see Figure 3) manages both tactical functions and strategic activities, including payroll and benefits, hiring, training, and onboarding. Corporate HR is also responsible for providing stores with the tools they need to meet business goals, contribute to succession planning, and develop a talent pool of future store leaders. At each individual store, an HR coordinator handles day-to-day interactions with employees and tactical / administrative tasks. These coordinators have a dotted-line reporting relationship to individual store directors and a solid-line reporting relationship to a corporate HR supervisor.

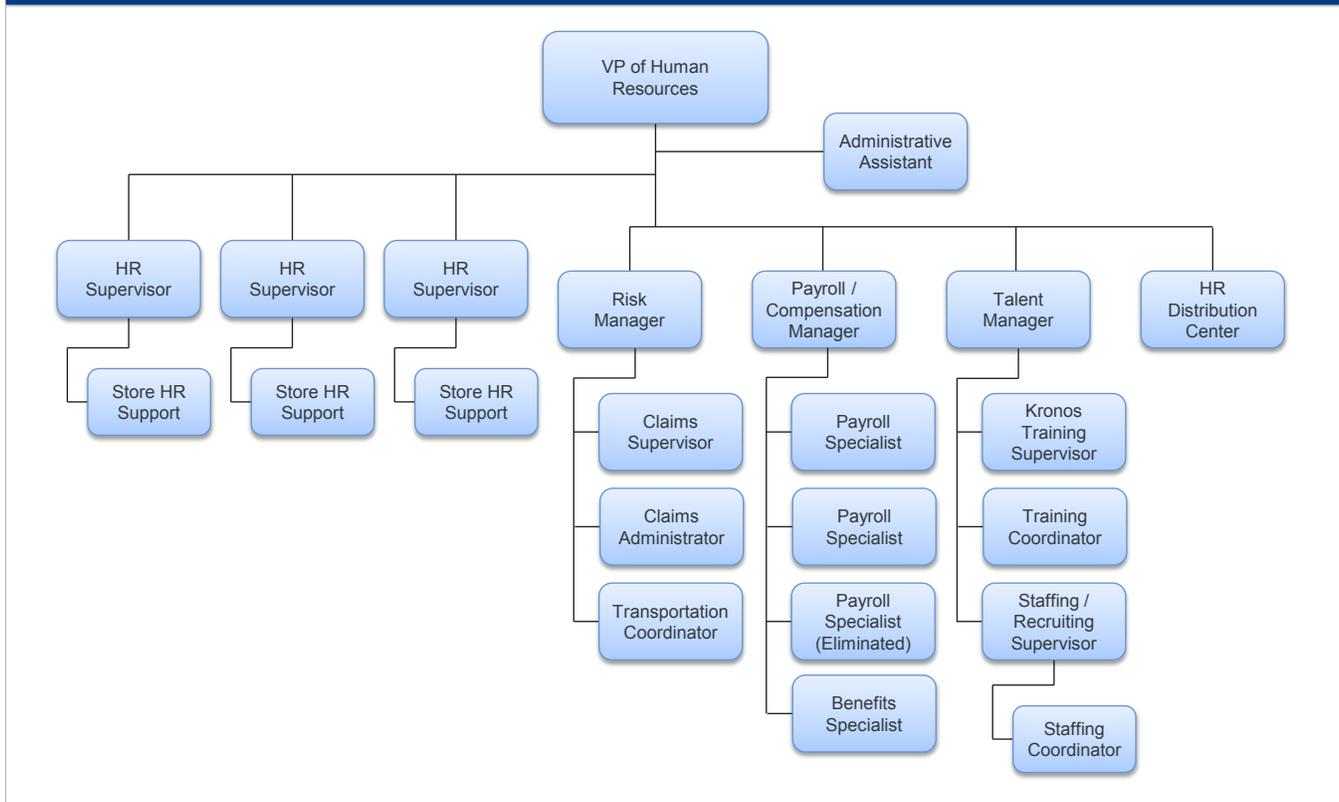
² Source: “Many jobs going unfilled for over 3 months,” *MoneyWatch*, cbsnews.com / Constantine von Hoffman, July 18, 2013, www.cbsnews.com/8301-505123_162-57594343/many-jobs-going-unfilled-for-over-3-months/.



KEY POINT

Northgate had a substantial need for a deep talent bench, yet it lacked easy access to even the most basic information on its leaders.

Figure 3: Northgate González Markets' HR Organization



Source: Northgate González Markets, 2014.

While this service delivery model provided individual store service and enterprisewide consistency, it also required extensive manual coordination between the stores and corporate HR. For example, communications related to employee start dates, pay changes, tax forms, and benefits were completed via multiple faxes for each activity and each employee.

Northgate's HR team recognized the imperative to develop scalable, efficient, and consistent processes, especially given its business plan to open five new stores per year. Leaders believed the best way to do this was by implementing technology that would deliver comprehensive talent management.

Identifying an HCM Technology Solution

To meet its business goal of adding thousands of employees in the next three years in a scalable fashion, Northgate needed to address its inefficient HR processes. The company's HR team recognized a clear opportunity to improve efficiencies and data accuracy through the centralization and automation of talent information. As a retail business requiring high levels

KEY POINT

Northgate's HR team recognized the imperative to develop scalable, efficient, and consistent processes—especially given its business plan to open five new stores per year—and believed HCM technology would enable that goal.

of customer service from its people, Northgate also needed better insight into its talent. HR wanted to provide store directors and assistant store directors with an easy-to-use HCM solution that would enable them to more effectively manage and develop their people.

HR identified the most immediate need as linking pay (and related compliance documentation) with performance management data. The plan was to build other talent management processes, such as onboarding, recruiting, and learning, onto that foundation, with an end goal of providing Northgate leaders with a better view of their people and their talent pipeline. A talent technology tool could give HR and store directors a single, accurate view of employees for tactical / administrative HR tasks and help the company evolve to more strategic talent management.

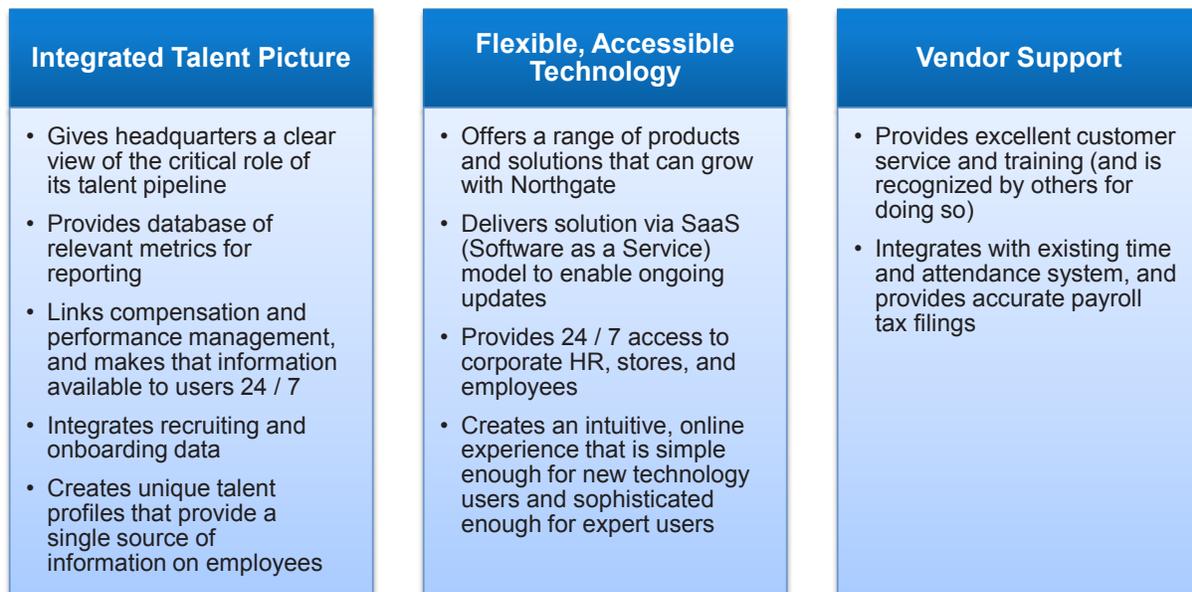
Northgate's chief human resources officer (CHRO) and chief information officer (CIO) established specific criteria for the HCM platforms the company would consider (see Figure 4).



KEY POINT

Northgate's criteria for a new HCM technology solution were the ability to obtain an integrated picture of talent, flexibility and accessibility, and the level of vendor support.

Figure 4: Northgate González Markets' HCM Platform Criteria



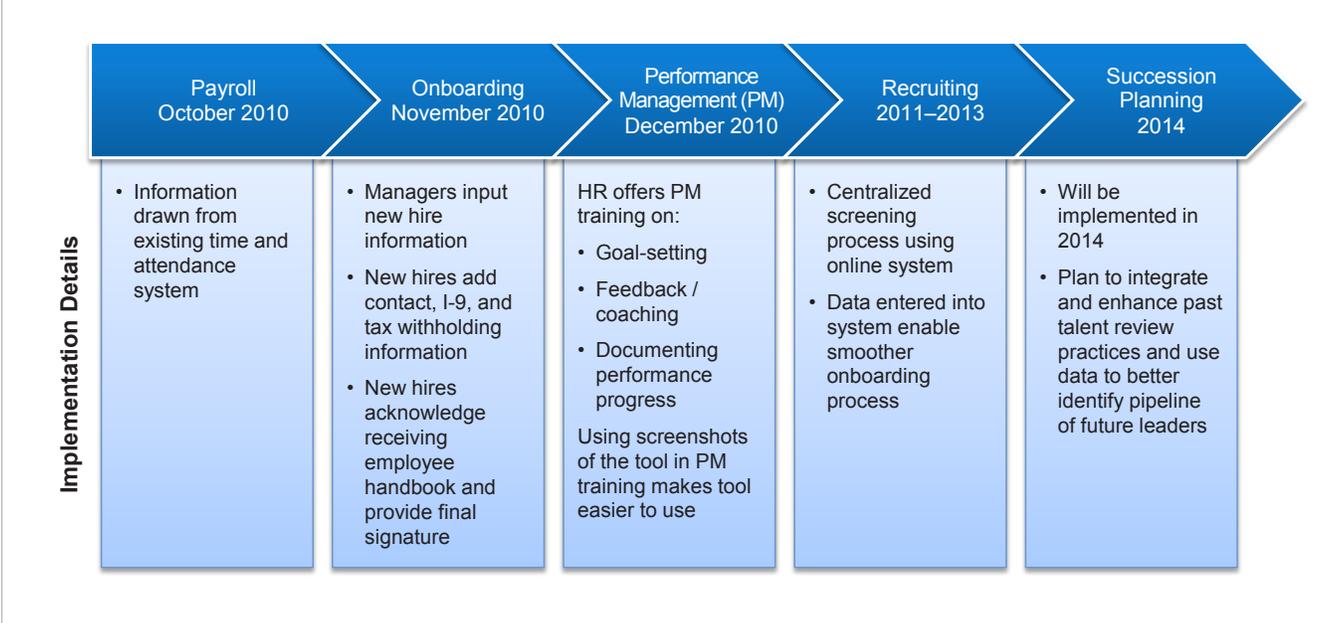
Source: Northgate González Markets, 2014.

Evaluating technology options against the criteria shown in Figure 4 took the CHRO and CIO about 18 months. They eventually selected Ultimate Software because of its reputation for customer service and its willingness to offer classes to help Northgate get started, as well as its cloud technology’s ability to integrate tactical human resources with strategic talent management.

Implementation Approach

The corporate HR group drove the implementation of Northgate’s new HCM technology, one feature set at a time. The range of products Northgate initially chose to implement included payroll, onboarding, performance management, and recruiting. Plans exist to implement a succession management feature in 2014. Figure 5 explains Northgate’s implementation approach and some of the key details of the implementation.

Figure 5: Northgate González Markets’ Integrated Talent Management Software Implementation Sequence



Source: Northgate González Markets, 2014.

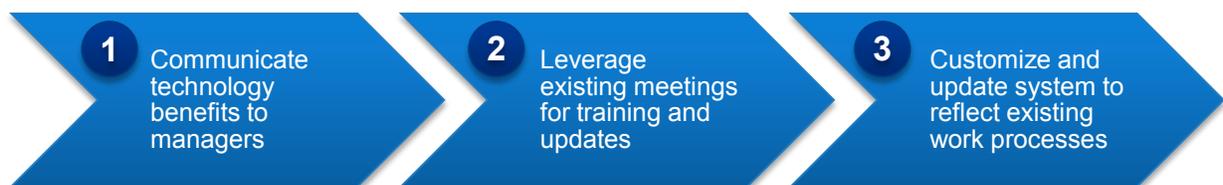
As a result of this implementation process, Northgate learned two key lessons:

- 1. Use the technology implementation to enhance existing processes.**
When Northgate implemented the performance management module, the HR team rolled out new training that both helped managers and employees use the new technology and developed core performance management capabilities. Specifically, the organization focused on improving the ability of employees and managers to set goals, provide feedback and coaching, and document performance. Northgate's vice president of HR believes that this combination of efforts has helped the organization achieve approximately 90 percent compliance in performance review completion.
- 2. Keep processes flexible to meet the needs of potential employees.**
The implementation of the recruiting module hit an unexpected roadblock—not all Northgate applicants were adequately computer savvy to apply online. Further, most stores lacked the ability to accept applications electronically. To address the situation, Northgate began installing kiosks in the stores to enable candidates and employees to interface with its career website. In addition, the company decided to continue providing paper-based applications. Despite this initial challenge, Northgate has used the solution to efficiently make approximately 2,500 hires since 2011.

Change Management

Once Northgate's CHRO and CIO had selected its HCM technology vendor, corporate HR leaders knew they had to closely involve the store directors and assistant directors, beginning with obtaining their buy-in for using the technology. This process included the steps shown in Figure 6.

Figure 6: Northgate González Markets' Change Management Approach



Source: Northgate González Markets, 2014.

First, corporate HR communicated the immediate WIIFM (“what’s in it for me”) benefits (described in greater detail in the next section). Second, corporate HR used existing monthly group meetings with store directors for training on each software module as it was implemented and for reviewing subsequent updates to Ultimate’s range of feature sets. “Creating a desire in users for the technology was deliberate,” stated a Northgate leader.

“We designed processes to work together, looking for technology to help manage the overall operations. While we empower each individual store, we want a holistic approach to everything—it’s hard to achieve administrative efficiencies if these processes stand alone.”

—Vice president of HR, Northgate González Markets

Third, once HR leaders had the buy-in of store directors, they customized the solution to match directors’ existing work processes and regularly updated the solution so it stayed current with existing protocols.

Business Impact and Benefits of the New HCM Software

The benefits to the entire Northgate González Markets organization have been significant since implementing the new HCM software. In this section, we detail the positive outcomes for employees, store directors, and HR, as well as the financial benefits.

Benefits to Employees

Employees saw a number of immediate benefits from the new technology. They were able to:

- Access the following information at any time, from anywhere, using any device:
 - Benefits enrollments and elections
 - Pay stubs
 - Performance reviews
- Apply online, in store, or at any other location for new roles
- Enhance employees’ technical skills by encouraging them to use new online technologies



KEY POINT

Northgate’s change management efforts focused on communicating technology benefits to managers, leveraging existing meetings for training and updates, and customizing and regularly updating the system to reflect existing work processes.



KEY POINT

Employees are able to access critical employment information smoothly, without having to wait for HR to respond to their requests.

- Read content in their native tongue (the solution can accommodate multiple languages, which is important because 99 percent of Northgate employees are Hispanic and only 50 percent are bilingual)
- Track progress on performance and development goals

Benefits to Store Directors

Store directors also receive a number of benefits. For example, store directors can now access the following information on demand, which enables them to better manage employees:

- Anniversaries, seniority levels, and birthdays
- Benefits eligibility
- Due dates for performance evaluations
- Immediate approval of paid time off requests
- Number of staff with individual development plans
- Number of regular and overtime hours worked
- Required training and attendance record
- Weekly rate reports

In addition, store directors gained access to metrics and a robust database that can help them better understand their workforce, identify trends, and then make appropriate changes. These metrics include:

- Customer feedback about particular employees
- Education and prior employer(s) of highest-performing employees
- Turnover rate

“In the past, creating these reports was a very manual undertaking. Our new software tools have made it easy for the technology to be a part of the way our entire organization does things, such as quickly retrieving and delivering data as well as holding store directors accountable for results. Overall, this has helped reinforce our culture of accountability.”

—Vice president of HR, Northgate González Markets



KEY POINT

Store directors are able to access the information they need to manage their employees more effectively.

Benefits to HR

One of the most substantial benefits for the HR organization was eliminating redundant and time-consuming tasks related to paperwork, spreadsheets, and faxes. This improved efficiency was critical to the organization being able to accelerate the rate at which it opened new stores.

“It used to take five faxes to make a salary change. Going to a paperless payroll made things much easier at both the stores and at corporate HR. Speed and efficiency were the immediate advantages, and accuracy improved, as we were able to eliminate a lot of human error in repeated data entry.”

—HR manager, Northgate González Markets

Removing tactical HR work was just the beginning of the benefits. HR also recognized that the implementation of the new technology resulted in the improvement of some critical talent processes. For example, Northgate has seen incremental year-over-year progress on performance appraisal completion rates and on-time reviews. Northgate’s vice president of HR also stated the technology helped managers focus more effectively on how the performance management process could align employees with strategic goals that impact the overall business.

The new HCM solution also provides a single source of real-time information on any employee or population of employees. As only one source of information exists, the definitions of the data within the solution are internally consistent—a critical factor to ensuring quality data for analysis. Consistent data capture provides Northgate with a rich database from which to develop metrics to better understand its talent. For example, the company can develop a more holistic view of the talent pipeline for its critical roles, including store director, assistant store director, and customer service manager. In addition, the data in performance reviews allow Northgate to identify and redeploy its highest performers to assist with opening new stores, a crucial component in opening new locations on time and meeting new store revenue projections.



KEY POINT

The new HCM solution increased process efficiency, supported the improvement of talent processes, and provided a single source of real-time information from which metrics and dashboards can be built.

Financial Benefits

From a financial point of view, the operational impact of implementing the talent management solution was immediate. With one centralized payroll, Northgate removed the 100 hours it took each week to run payroll, ultimately eliminating a payroll specialist role. This immediately saved the company \$40,000. Even more critically, the company hired 2,500 new employees and opened eight new grocery stores without adding any additional corporate HR employees. This type of efficiency gain was what Northgate expected when it first chose to implement the technology.

Lessons Learned

Reflecting on the company's implementation and use of HCM technology over the past three years, Northgate González Markets' leaders identified five lessons learned:

- **Plan for the implementation process to generate unexpected questions.** Northgate moved quickly to implement the recruiting feature set after the smooth implementation of the payroll and performance management modules. However, unforeseen questions and issues arose during implementation and integration efforts for this function—not all applicants were adequately computer savvy to apply online, and most stores lacked the ability to accept applications electronically. Northgate leaders recommend that other organizations build time into their implementation plans to respond properly to unanticipated challenges.
- **Educate and prepare stakeholders to lead by example.** Northgate leaders believe that adoption could have been swifter and more complete if stakeholders had more effectively led by example—for example, holding store directors accountable for tracking their own goals using the technology for performance reviews. Having leaders use the technology to track their personal goals might also help drive the technology integration of talent metrics for Northgate's balanced scorecard.³

³ The "Balanced Scorecard" is a strategic planning and management system that is used extensively in business and industry, government, and nonprofit organizations worldwide to align business activities to the vision and strategy of the organization, improve internal and external communications, and monitor organization performance against strategic goals. It was originated by Drs. Robert Kaplan (Harvard Business School) and David Norton as a performance measurement framework that added strategic nonfinancial performance measures to traditional financial metrics to give managers and executives a more "balanced" view of organizational performance. For more information on the balanced scorecard, consult www.thepalladiumgroup.com/pages/welcome.aspx.



KEY POINT

The financial benefits of the new HCM technology solution included the elimination of a payroll specialist role; the smooth, on-time opening of eight new stores; and the hiring of 2,500 new employees without adding any corporate HR employees.

- **Realize that technology is a tool to enable the process, but it is not the entire process.** Focus on the underlying talent management process, along with the technology, to help stakeholders transition to the web-based solution. Northgate achieved this when it took a side step to provide training for managers on how to conduct effective performance reviews.
- **Track and communicate degrees of success through metrics.** Identify milestones that reflect increasing degrees of success, and then highlight a few vital metrics such as the percentage of leading performers deployed to open new stores or voluntary turnover and retention rates by location. Push out some reports to stores from headquarters and expect stores to pull their own individual reports for metrics for which they are accountable, including turnover, safety, labor as a percentage of sales, and percentage of on-time reviews.
- **Tackle intermediate steps to achieve strategic goals.** Northgate knows it must continue to pursue the smaller tactical wins (e.g., the implementation of each feature set) to achieve the broader goal of integrated talent management and the ultimate goal of managing rapid growth. Remaining focused on goals—and identifying critical milestones along the way—helped Northgate make significant progress toward its strategic goals.

Leading Practices

By carefully implementing and managing its migration from a paper-based process to a web-based solution, Northgate not only captured lessons learned but also discovered several practice that led to highly effective results. These are some of the leading practices illustrated here from which other organizations can learn:

- **Identify clear criteria before purchasing new technology.** The CHRO and CIO at Northgate engaged in an iterative process of analysis before deciding on the type of technology the organization should purchase. This process resulted in these executives eventually developing clear criteria that helped them more easily select their vendor. Other organizations should also spend time early in the process identifying the organization's needs and appropriate vendor criteria before purchasing new technology.
- **Implement new technology at the rate your organization can absorb it.** Even though Northgate had plans to implement a number of software feature sets, it took a phased approach that enabled the company to digest change incrementally. This phased approach helped ensure that people could learn the new technology and extract value from it before they were asked to learn even more.

- **Adjust both the technology and the talent processes to each other.** As Northgate implemented its talent management solution, it examined its existing talent management processes to determine how they could be improved. In some instances, such as with the introduction of candidate kiosks within the stores, this meant designing a new approach that could work with the infrastructure of the latest technology. In other instances, it meant changing the way the technology worked to match Northgate's approach. Flexibility was a key to success when designing the right methodologies for Northgate González Markets.
- **Help employees and managers understand the WIIFM ("what's in it for me") factor when rolling out new technology.** Northgate's HR group focused on communicating the benefits of the new solution to the organization. Some of these benefits included having higher levels of accuracy due to using a single source of information, instant access to information via mobile devices, employee and manager self-service, faster implementation of administrative changes, and accelerated hiring of employees for new stores.
- **Use technology to increase efficiency and people to improve effectiveness.** Northgate's previous processes were inefficient and ready for automation. By using technology to update these processes, the company significantly improved customer service and reduced costs (primarily through headcount reduction). Northgate also recognized that although the technology could go a long way in improving efficiency, the company needed to engage managers and employees to improve process effectiveness. For example, Northgate launched new performance management training to improve manager and employee capabilities—training that coincided with the rollout of the new technology.

Next Steps

Northgate González Markets' leadership team recognizes that succession planning and strategic talent development are the culmination of integrating multiple processes for talent management. Store directors are working toward using reports from the talent management solution to make recommendations on how to better identify and develop emerging leaders. The organization is also looking to implement Ultimate Software's succession management capabilities in 2014.

In addition, Northgate sees the value of continuously improving its existing processes. The company's leaders are looking to maximize the use of the current solution. In particular, they plan to increase the number of store directors leveraging the talent management solution for their own professional and personal goals. The leaders plan to use these data to drive more accurate reporting and understanding of performance.

Finally, Northgate will work to improve the integration of its data. Next steps will include:

- Integrating the talent management technology with other systems (e.g., general ledger and workers' compensation claims administration)
- Coordinating talent processes among the specialized HR functions (e.g., recruiting and training) to push more of these standardized activities to individual stores

Conclusion

From its initial inception, Northgate González Markets had a foundation for success: Create an organization that caters to a growing Latino market and instill into every store a culture focused on entrepreneurship, service, and leadership. However, as the company grew, it found its traditional, manually intensive approach to talent management could not evolve with its changing business. For years, Northgate experienced various inefficiencies, challenges, and risks brought about by paper-based processes for payroll, HR administration, and recruiting.

Technology became an essential component in helping Northgate pursue leading practices for HCM. Since implementing a new HCM software solution, the company has enjoyed the benefits of a real-time, web-based, mobile technology that enables employees and managers to access a single solution, view the same data, and make changes quickly and efficiently. Further, the HCM software provides a range of business intelligence to help Northgate's leaders make stronger management decisions that impact the overall business. Finally, increased efficiencies have allowed the company to significantly increase its employee population while opening five new stores per year and reducing administrative headcount. Northgate González Markets is an example of a company implementing technology to strengthen its HR organization to better meet the shifting demands of its business.

Appendix I: Topics for Discussion and Learning

The following sections will provide you with considerations for sharing and implementing the leading practices highlighted in this report.

Key Learnings

Below is a list of key learnings from this case study:

1. Take a thoughtful approach to involving users on the front end and throughout implementation to operationalize technology use. Do not underestimate the value (and related effort) of integrated HCM.
2. Plan to educate stakeholders and executive sponsors so they can lead by example.
3. Technology is a tool in the management process, but it is not the entire process.
4. Track and communicate degrees of success through metrics.
5. Major strategic objectives are met by tackling intermediate goals; do not give up.

Ideas for Action

Below is a list of actions you can take to apply or implement the leading practices highlighted in this report. There are some foundational elements that we highly recommend to be in place within your company to execute such a plan, process, or program:

1. Identify areas of your organization that may have inefficiencies that can be addressed through automation or process improvements. Determine whether pursuing simple technological fixes or seeking an outside vendor is more appropriate.
2. Analyze current talent practices. If your organization decides to implement a technology solution to facilitate these practices, determine the extent to which these processes will need to evolve—separately from the technology—to better support the needs of managers and employees. Document the ideal new process, and use it to develop criteria for selecting a new software solution.
3. Assess the organization's readiness for change. What other initiatives are currently underway that might distract from a new technology implementation? Identify whether specific areas of the business may be

more open to piloting new technology than others. Collaborate with those parts of the business in designing the new approach and testing the new talent management system.

4. Collaborate with managers to identify critical metrics that will help them manage their people and business more effectively. Customize and implement technology that will maintain managers' focus on those vital few metrics.
5. Analyze the organization's talent management processes. Determine the extent to which these processes are already integrated or whether they need to change to be more ready for integration. Identify individuals who can participate in this project, and seek senior leader support for the effort.

Questions to Consider

Below is a list of discussion questions that you can ask your team, colleagues, and business leaders to help you take the next steps:

1. Do we have the senior leadership support necessary to implement a new technology system? Will leaders provide the budget to build or buy this new system?
2. What is our timeline for implementation of a new system? Is that timeline realistic?
3. How can we reallocate our resources (including both budget and talent) to support implementation and use of web-based technology for talent management?
4. Because integrated talent management involves more than one specialized function, are we prepared to work in cross-functional teams to implement an organizationwide initiative? Do we have precedence for initiatives between corporate headquarters and individual locations to capture what has worked well and what can be done better?
5. How will we know if the talent management solution we implement is being fully used and to what extent its use correlates with business impact?

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