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- **MaryEm Musser**
National Director of Training & Development, BDO

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Improving Business Intelligence, Talent Retention, and Compliance by Integrating Learning with Performance

Business Challenges:

- Improve visibility into the workforce to match expertise to clients
- Increase talent retention and fill talent gaps at key positions
- Replace manual processes and avoid costly customization
- Improve reporting capability for better compliance

Solution:

BDO uses the SumTotal® Talent Development Suite™ to simplify learning management, capture business intelligence, solve compliance tracking issues, and provide on-demand learning, along with ToolBook® to create learning content.

Results:

- Reduces risk by retaining key employees
- Improves business intelligence and visibility into the workforce
- Ensures consistency of processes across multiple offices
- Enhances tracking and reporting to boost training compliance levels
- Aligns learning development to meet the company's goals



Company:
BDO

Solutions:
Talent Development
(Performance and Learning Management)

Industry:
Services, Accounting and Financial Services

Countries:
USA and Global

Products:
Talent Development Suite™
(TotalLMS™ and SumTotal Performance), Toolbook®

Business Challenges: Improve Visibility into the Workforce

Named one of the “2009 Best Accounting Firms to Work For” by Accounting Today magazine and Best Companies Group, BDO takes pride in hiring and developing people with exceptional skills and talent. The nature of its market and its industry makes it imperative that the company not only recruit individuals who can make a difference the moment they arrive, but who can flourish under the firm’s core values of competence, honesty and integrity, professionalism, dedication, responsibility and accountability.

BDO faces the same challenge that other firms in its industry struggle with: retaining the high performers. The accounting industry is traditionally linear in its development; for the most part, it takes about six years to make manager, and nine or more years to make partner. The highest performers can accelerate this development and progress faster in their careers if offered the opportunity to work with clients in particular industries where they have expertise. Without these opportunities, key talent might begin to look elsewhere if they’re not achieving their professional goals fast enough.

“If we’re not doing a good job understanding what the development goals are of our people, then the job satisfaction and engagement rating is going to be low,” said MaryEm Musser, BDO’s National Director of Training & Development. “We needed to better understand their goals, interests, the types of clients they worked with, their industry-specific skills, their talent deficiencies, and their roles in the firm. That type of business intelligence regarding skills and experiences is very important to us. When you look at any accounting firm, part of its selling point when talking to potential clients is its industry expertise and work with other clients. Matching expertise to the right type of client is crucial to making revenue, even at the client proposal stages.”

The firm also needed to reduce the complexity of its manual learning management processes and replace its lightweight performance management system that would have required costly customizations to expand its capabilities. “Our goal-setting, performance management and learning management processes were on separate systems or in some cases offline, manual processes,” explained Musser. “Our data was spread across multiple platforms, and there was no way to collectively pull business intelligence together on our work force. That was the driver behind investing in the effort of consolidating our systems in order to evaluate that employee information and react to it in a timely manner.

Adding goal management would have required a significant investment in enhancing the firm’s existing performance system. “We would still have had the challenge of linking goals with learning management,” added Musser. “We had a complex environment that didn’t give us a holistic view of our workforce, and we knew we had to either make a significant investment in customizing the current system, or change the system.”

Solution: Integrating Learning with the Performance Cycle

BDO evaluated a number of systems before choosing the SumTotal Talent Development Suite to integrate learning and performance management with employee goal-setting, assessments, and project-based reviews. BDO also chose ToolBook to create learning content. The firm uses the Software-as-a-Service (SaaS) model for a hosted solution that simplifies management and increases business agility with rapid deployment and low cost of ownership.

BDO appreciated SumTotal's experience with accounting industry requirements. "We have some very unique tracking needs on learning events," explained Musser, "and we needed to add fields to meet our reporting needs. When you're making a selection like this, during the sales cycle the answer is always 'yes' from vendors, but what you don't know at that time is what it takes to get to 'yes' — what the path looks like, and how painful or easy is it. The SumTotal team showed us in very short order a working module that really fit our needs, and demonstrated that for SumTotal, this was not uncharted territory. And that's what got us to 'yes'. It turned out to be a better investment than investing in enhancements for the current system, which would have included modules not yet written."

BDO uses the SumTotal Goal Management module to communicate critical goals and measure employee performance, and the 360-degree multi-rater feedback module to collect feedback during performance appraisals, help employees gain a perspective on performance, and better align their goals with corporate strategy. SumTotal also worked with BDO to customize the Project-based Reviews module to capture performance feedback with temporary teams that are put together for client engagements.

"What we're trying to do with the employee goal process is to make sure that everyone pays attention, so that goals are not set just once a year and then forgotten," added Musser. "By tying learning into the performance management cycle, we can engage employees on a more timely fashion, with quarterly or monthly follow-ups, and ensure that individuals going through the goal-setting process are able to communicate where they want to go with their careers. And if we can meet those needs, employee engagement increases. With SumTotal, we saw an amazing opportunity to replace our lightly-functional performance system with a more holistic view of the workforce that sets the foundation for this talent management strategy."

“ SumTotal®, did a really good job of helping us think through all of the business drivers and how to use the solution, so that we could make the best, most informed decisions. SumTotal does this better than most vendors. ”

- MaryEm Musser
National Director of Training & Development, BDO

Results: Improves Business Intelligence and Reduces Risk

The SumTotal Talent Development Suite helps BDO reduce risk by retaining talent in critical positions, managing succession plans, and improving compliance reporting. The solution improves business intelligence and visibility into the workforce, and aligns learning development to meet the firm's performance needs. "The goals of implementing learning management was to simplify our learning environment, capture all learning in one area, support on-demand learning, and really solve our compliance issues," said Musser. "We completely reached the mark on all of these goals. Before, with some of our required training programs, we were running at 82 percent compliance, and now we are consistently at 92 - 95 percent compliance."

The SumTotal performance management solution also ensures consistency in evaluations and assessments across multiple offices. "The risk is having too many different versions of processes in which employees are measured and goals are set and reviewed," said Musser. The information is not as reliable or meaningful for matching expertise to clients or identifying gaps in our skills. "What we are now able to do is establish a consistent way that everyone is evaluated and assessed, and how they're setting and reviewing goals, to ensure that we're providing the same opportunities for development across the firm, and collecting reliable and meaningful information."

With this talent management strategy and the SumTotal Talent Development Suite, BDO is now able to align learning and performance processes to meet the company's goals, fill talent gaps, and increase visibility into its workforce. "SumTotal did a really good job of

helping us think through all of the business drivers and how to use the solution so that we could make the best, most informed decisions,” said Musser. “SumTotal does this better than most vendors, in truly understanding what our business drivers are, and how we’ll use the solution.”

About BDO

BDO is the brand name for BDO Seidman, LLP, a U.S. professional services firm providing assurance, tax, financial advisory and consulting services to a wide range of publicly traded and privately held companies. For 100 years, BDO has provided quality service through the active involvement of experienced and committed professionals. The firm. As an independent Member Firm of BDO International Limited, BDO serves serves clients through 37 offices and more than 400 independent alliance firm locations nationwide multinational clients through a global network of 1,138 offices in 115 countries. BDO offers a sophisticated array of services and the global capabilities of the world’s fifth largest accounting and consulting network, combined with the personal attention of experienced professionals. For more information, visit www.bdo.com.

About SumTotal

SumTotal Systems, Inc. is a leading provider of proven talent development solutions that automate and integrate learning, performance, and compensation to drive business results on a daily basis. Our solutions strengthen and develop employee skills to accelerate time-to-market, close skill gaps, and reduce the risk of business disruptions. With more than 1,500 customers and 18 million users worldwide, we have increased performance at some of the world's best-known companies, organizations, and government agencies. Our category leadership and applied insight help us understand the critical success factors for businesses of all sizes.

For more information

For more information please call +1-650-934-9500 or toll free at 1-866-SMTOTAL, or visit us on the Web at www.sumtotalsystems.com.

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