Global Outreach

Connecting 4,500 global employees


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About CEB and the IRC
What is CEB?

CEB is a best practice insight and technology company.

- 21,000+ Senior Executives
- 10,000+ Global Enterprises
- 110+ Countries Represented
- 81% of the Fortune 1000
- 100% of the Fortune 100
- 93% of the CAC 40
- 89% of the FTSE 100
- 74% of the Dow Jones Asian Titans 50
We are global
We’ve had a very busy past 5 years

- **2000**
  - 16 programs
  - 2 offices
  - 667 employees
  - 6 IRC staff

- **2005**
  - 38 programs
  - 3 offices
  - 1865 employees
  - 4 IRC staff

- **2010**
  - 51 programs
  - 13 offices
  - 1879 employees
  - 7 IRC staff

- **2015**
  - Traditional business + assessments + analytics
  - 50 offices
  - 4533 employees
  - 6 IRC staff
We’ve grown through acquisitions
About CEB’s Information Resource Center

The IRC consists of six librarians, all of whom have MLS degrees. We have over 60 years of cumulative experience at CEB.

The IRC-staff-to-CEB-employee ratio is one team member per 767 employees.

In 2014, we were recognized by SLA’s Business & Finance Division as a Center of Excellence in Management.
The IRC’s mission

We enable more intelligent insights and member interactions by making access to information as seamless and efficient as possible.
IRC Training/
E-Learning
The IRC provides training customized for functional roles within the organization.

- Research 101 for Revenue (sales staff)
- IRC 101 for Research & Advisory (analyst staff)
- On demand “roadshows” for specific practices
Training – Previous Model

IRC Training Before 2014

Classroom Based
1-2 Classes/Month
Local Attendees
1-2 Hours/Class
100+ Hours/Year
International Webinars
Training – Challenges

Our older model of training was not as compatible with the changes in our workforce

- Increasingly global workforce means less successful outreach
- Diverse workforce roles
- Technical & A/V Difficulties
The IRC decided to transition to an e-learning model in 2014 to better serve our patrons. There were several factors to consider during this process.

- Compatibility with LMS
- Flexibility of module output
- Accessibility
- Budget
Typical Search Activities

- Locating CEB Research and Products
- Finding articles on a new topic or to answer a member question
- Locating external data and statistics
- Finding company tactics and case studies
Training – E-Learning Feedback

“Provides great insights into how to look for research material, using internal and external sources”

“It really gave me a clearer picture of how to prospect”

“Thorough explanation and insights”

“I really liked learning about how to navigate through the resources.”
Training – Looking to the Future

- Moving to smaller, more “consumable” modules
  - Users want more on-demand training
  - Content tailored to specific roles/tasks

- Efficient production/editing
  - Screenshots (changes to interface/branding)
  - Narration

- Cultural awareness of diverse workforce
  - Some locations prefer live interaction

- Establishing reputation as e-learning experts
IRC Knowledge Management – Across the Board
Across the Board: How it started

Issue:
- While on a call, sales staff need to quickly reference relevant CEB content for member/prospect

Context:
- Format of content: Print
- No central organization
- Staff in two locations: US, UK
- Minimal capacity for technology, budget, staff time
Across the Board: Initial plan

This project represented the IRC’s first foray into firmwide knowledge management.

- Migrate to a more accessible digital format
- Use a technology platform available to all staff
  - No extra licensing costs preferred
- Develop categories for content
Across the Board is born
Partnering with IT is one of ATB’s biggest challenges.

- Intradepartmental collaboration and competing project priorities
- Maintenance due to technology upgrades
- Changing processes in new systems
- Defining guidelines for what to include as the firm grows
- Outreach and promotion to more staff in more locations
Outreach to more staff in more locations globally is an ongoing issue.

- Site enhancements
- Including content from acquired companies
- Continued outreach and promotion
Advertising IRC Services Globally
Our various forms of communication

- Weekly welcome email to new hires
- Monthly firm-wide newsletter
- Internal social media sharing
# Planning It All – Our Editorial Calendar

<table>
<thead>
<tr>
<th>DATE</th>
<th>DAY</th>
<th>MONTH</th>
<th>EVENT NAME</th>
<th>Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>2/2/2016</td>
<td>TUE</td>
<td>FEB</td>
<td>Social Media Post</td>
<td>Come see us in the Productivity Lab at Master our Research, Advisory, something for you!</td>
</tr>
<tr>
<td>2/16/2016</td>
<td>TUE</td>
<td>FEB</td>
<td>Social Media Post- News Services Platform</td>
<td>The vast majority of CEB employees are subscribed to at least one of the IRC daily newsletters. Throughout February the IRC will be migrating our daily news services to a new platform. Subscriber benefits include: Cleaner formatting, customized subject areas, more sources, and improved access via mobile devices. Please contact the IRC with any questions/comments</td>
</tr>
<tr>
<td>2/22/2016</td>
<td>MON</td>
<td>FEB</td>
<td>IRC Newsletter Items Due</td>
<td>Across the Board Update (launch)</td>
</tr>
<tr>
<td>2/25/2016</td>
<td>THU</td>
<td>FEB</td>
<td>IRC Newsletter Sent</td>
<td>Across the Board Update (launch)</td>
</tr>
</tbody>
</table>

The IRC newsletter, Infochange, is hitting your inboxes this morning. Make sure you take a look to learn about the new version of Across the Board as well as an update on our new daily newsletter platform.

### Notes
- **Date of post, newsletter, or email**
- **Communication type**
- **Social media scripting or newsletter theme**
Weekly Welcome Email to New Hires

Our welcome email is our first point of contact with new hires.

- Three different role-specific emails
  - Sales
  - Research, Product, and Advisory Roles
  - Administrative & Corporate Functions

- Benefits
  - Short introduction to our services
  - Links to e-learning training relevant to their role
  - Links to resources targeted for their needs

- Don’t forget to reach out to managers of new hires!
Weekly Welcome Email to New Hires

Highlight role-specific training

You can learn more about the services and tools available to you at CEB through our *IRC 101 for Research & Advisory* e-learning course in *Pathfinder* (search for “IRC 101”). At the end of the course, you will be able to:

- Locate CEB research and products
- Find articles on a new topic or to answer a member question
- Locate external data and statistics
- Find company tactics and case studies.

Link to role-specific tools

A quick tour of the *IRC Portal* outlines our services.

- Browse the *IRC’s Research Tools page* for relevant resources and tutorials
- Discover the world-class suite of *business research tools, journals, books, and e-books*
- Sign up for our news services (see below) to receive news about companies and executives or keep current on your practice area
Monthly IRC Newsletter

Newsletter Content

- New electronic and print resources
- Journals, articles, and ebooks on trending topics in business and finance
- Practice-specific resources

Example Topics

#FasterBetterStronger Time Management Resources

The World Cup of Sources and International Statistics

Q4 Tips for Revenue Staff

Big Data Resources and 2016 Trends
Inside this issue

- Get Smart on Big Data
- Looking back, Looking ahead - Industry Trends
- Data, Data, Everywhere!
- Quicklinks and Ebrary Books
- CEB in the News
- IRC News Services

IRC RESOURCES

Get Smart on Big Data

Want to know more about Big Data?

The IRC has books on big data and data analytics grouped together in our catalog under the useful link “Big Data”. You can also just click here. Print books are located in the SW corner of the 5th floor of Waterview. Come check us out!

For our global colleagues, take a look at the e-books available to you on the subject. These are available right from your desktop.

IRC RESOURCES

Looking back, Looking ahead - Industry Trends

What were the business highlights of 2015? What should companies expect in 2016? Each autumn, business information sources publish annual reviews or annual forecasts on current industry trends and challenges. Recent examples include:

- "The Year Ahead" series, Bloomberg: Technology | Global Economics | Retail
- Best Business Books 2015, strategy+business
- Gartner Reveals Top Predictions for IT Organizations and Users for 2016 and Beyond, Gartner.com
- CFOs reveal their top issues for 2016, CFO.com

To find your own area of interest, here are some quick tips:

- IRC Onseach: search multiple IRC collections by adding your keywords to this base search template.
- Google: look for competitors’ news and publications.
- Deloitte trends 2016
Internal Social Media

Share search tips, training announcements, or resources

Use a #hashtag to create continuity

Reach out to different user groups
Internal Social Media

Attach yourself to other communication campaigns or firm-wide initiatives

Don’t forget to cross-pollinate communications
Challenges and Lessons Learned

Competing for Attention

Communicating Value

Understanding Needs of a Global Workforce

Technical Difficulties

Cross-departmental Collaboration

Creating Content
Questions?