



IN THE BUSINESS OF YOUR SUCCESSSM

The Workforce View in 2014/15





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Welcome to the Workforce View in 2014/15

What a difference a year makes. After a sustained period of economic downturn, optimism has finally become the prevailing mood of the UK workforce. Business and economic forecasts look rosier than they have in years, and confidence has bounced back with a vengeance.

Yet the upturn brings its own challenges, as organisations struggle to manage the return of growth, investment, and new opportunities. As always, the effective management of people is front of mind, with the power to make or break business strategies. Today's HR Directors are grappling with very different issues to those faced just a few years ago - but they are no less challenging to overcome.

"As one of the world's leading providers of Human Capital Management solutions, ADP is committed to contributing to the national discussion on current people challenges and the future of the world of work."

David Foscett,
MD, ADP UK

As one of the world's leading providers of Human Capital Management solutions, ADP is committed to contributing to the national discussion on current people challenges and the future of the world of work. As such, this is the third year that we have carried out in-depth, independent research to capture the mood, views, and experiences of employees and employers across the country.

Three years ago we found a pessimistic and uncertain workforce. Employees were anxious, lacking the confidence to progress or perform to their full potential. There was also the anticipation of substantial change afoot, with factors such as technology, flexible working and the ageing workforce causing concerns and excitement in equal measure.

I am pleased to report that *The Workforce View in 2014/15* paints a much brighter picture of substantially increased employee optimism. It shows a flexible workforce who are better equipped with the skills, tools and environments they need to succeed.

However, the winds of change are still blowing. Talent has once again risen to the top of the agenda, and the workforce is more connected than ever. At the same time, the drive for work-life balance continues unabated, with employees increasingly focused on how their employers can help them achieve it.

We now find an HR profession faced with balancing a number of priorities, ranging from employee engagement and new technologies, to flexible working and changes in legislation. Here, we hope to offer some valuable insights into the year ahead for HR, and the issues that are front of mind for both employers and employees across the country.

We welcome your comments on how HR professionals and companies can respond to the challenges of the talent-led economy. Please do join the conversation using #ADPinsight on Twitter: @ADP_UK.

David Foscett, Managing Director, ADP UK



Executive summary

Optimism returns to UK PLC:

- Optimism in the UK workplace is on the up, with more than three quarters (77 per cent) of employees describing themselves as 'optimistic' about the decade ahead, up from 64 per cent in 2013.
- Over a third (35 per cent) of the workforce feels that career opportunities are growing, compared to just 22 per cent in 2013.

Talent gap moves to the top of the agenda:

- Half of employees see talent gaps due to cuts and a lack of recruitment as the biggest threat to their organisation. In 2013, just 37 per cent saw talent shortages as threat.
- A significant proportion (46 per cent) of employees are concerned that cuts to training and employee investment could endanger their organisation, up from 38 per cent last year.

Methodology

The research for ADP was carried out by independent market research agency Opinion Matters between 28 August 2014 and 4 September 2014, using a nationally representative sample of 2,505 UK working adults, and 202 HR Directors.

Any statements made with respect to percentages within this report relate to this proprietary research (unless otherwise referenced).

Tools of motivation:

- Employees rank "flexible working and the ability to shape their working life" as the most important factor for their engagement. 30.4 per cent put flexibility first, just ahead of praise and recognition (30.1 per cent).
- In contrast, HR Directors (HRDs) believe 'praise and recognition' is the chief motivating factor for their employees. 70 per cent rank this as number one, followed by 'fair and open leadership' (60 per cent). The 'ability to work when and where they want' is given third place by HRDs.

Technology strengthens foothold:

- Technology is transforming working life, as 72 per cent of employees say technology has changed their role or career to some degree in the past twelve months.
- Mobile technology is enabling flexible working, and only one in three (34 per cent) employees today do not have a mobile phone, smartphone, tablet or laptop provided by their employer.
- As flexible technology becomes more widespread, employees are increasingly concerned about technology impacting the balance between personal life and work. 28 per cent now feel the lines are becoming blurred, up from 16 per cent in 2013.

Shared parental leave becomes a reality:

- The workforce broadly welcomes the UK's new shared parental leave proposals, with one third (33 per cent) of employees aged 16-34 planning to take advantage of the entitlement.
- Despite anticipated popularity with employees, 21 per cent of HRDs still say they aren't ready for the introduction of shared leave in December.



Introduction

Almost every month of 2014 has brought fresh evidence of renewed growth in the UK. In October 2014, the International Monetary Fund (IMF) revised upwards its expectations for the UK economy, predicting an upturn of 3.2 per cent this year and 2.7 per cent next year¹. The long established narrative about recession has now been replaced by news of the UK as the fastest-growing economy in the G7 group of leading industrial nations².

Brighter economic news is translating into growing employee optimism, with over three quarters of workers now feeling positive about their prospects at work. Just over seven in ten workers believe the future of work to be stable.

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Employees have also welcomed the new flexible working legislation that came into force in June 2014, with a significant proportion of UK employees valuing flexibility higher than any other non-cash factor.

Technology plays an important role in enabling this change and, indeed, more workers are now provided with the tools they need to work flexibly by their employers. The time may come when the idea of working from a fixed location at set hours, seems as old fashioned as horse-drawn carriages.

As well as having the right tools, UK employees are generally confident they have the right skills to succeed. Fewer than one in ten (9 per cent) employees feel they are ill-equipped in terms of skills. However, against this bright background, concerns about talent shortages are rising.

A significant proportion of the workforce is concerned about the need for fresh talent and good training to drive growth and innovation. This suggests that an increasingly talent-driven economy is emerging, where an organisation's ability to retain the right skills and drive employee motivation, are recognised as critical to its success.

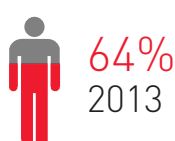
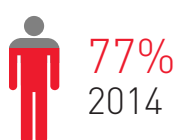
The Workforce View in 2014/15 asked employees and, in parallel, HR Directors about the key issues affecting them, while considering how the quality of working life can be further improved. Providing flexible working conditions and the right technology are part of the picture, but the rising expectations of the workforce mean that HRDs must be creative to secure and engage talent. One fifth of the workforce wants to find more 'meaningful' work – but how many HRDs today believe they are ready to meet employees' expectations?

Employee view

The Future

After enduring over six years of recession, flat-lining and uncertain recovery, the UK economy is unmistakably bouncing back. The findings reveal a corresponding shift in work sentiment.

Over the past three years, employees are increasingly optimistic about their prospects in the decade ahead.



Today, an encouraging 77 per cent of workers are optimistic about their prospects in the decade ahead, showing a steady increase from 59 per cent in 2012³ and 64 per cent in 2013⁴. Importantly, the proportion of 'very optimistic' employees has also doubled, as a quarter (26 per cent) of respondents has now adopted this bright outlook on work, up from 13 per cent in 2013.

Uncertainty about the future is also on the retreat. When asked to characterise the future of work in 2013, the majority of employees (55 per cent) in 2013 believed it to be 'unpredictable'. However, this year less than half (48 per cent) would agree with this statement. Undoubtedly, confidence has come roaring back to the workplace, at least when it comes to the general economic climate and the health of organisations.

The picture becomes less clear when employees are asked to consider their own role. Here, over three quarters (77 per cent) anticipate some kind of change in the year ahead, up from 60 per cent in 2013. A number of employees are looking forward with hope, as over a third (35 per cent) believe that career opportunities are growing again. In 2013, just one in five (22 per cent) said this.

While the future looks favourable to most of the workforce, one in five (21 per cent) employees still believe that their role could be at risk in the months ahead. Uncertainty is most pronounced among public sector workers, where 24 per cent think their role is in jeopardy, compared to 18 per cent in the private sector.



Adaptable enterprises

It has become evident that the business environment is moving forward faster than ever before, and leaders must be open to new ideas and good at adapting to change. It seems that organisations are increasingly prepared to meet future challenges, as the number of employees who believe that their employees have what it takes to survive and thrive, has more than doubled.

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Views around the country

The Workforce View in 2014/15 looks at the UK workforce as a whole, but the findings also reveal how attitudes are changing from region to region.

Employee optimism is a case in a point. The research shows that employees in Scotland are among the most optimistic in the UK, with 81 per cent describing themselves as such, opposed to 77 per cent among the wider population. Lower levels of optimism are found in Northern Ireland (70 per cent), Wales (73 per cent) and Yorkshire (74 per cent).

Londoners, however, appear to feel brightest about the future, reporting the highest level of optimism in

the UK (82 per cent). London-based employees are also the most likely to see the future of work as exciting: nearly three quarters (73 per cent) hold this view, compared to an average of 67 per cent across the country and a low of 62 per cent in the North East.

Similarly, London employees are more likely than people in any other region to say their employer is 'dynamic'. Reflecting the capital's demographic structure, employees in London are also more likely to see fresh talent from overseas as a threat to their organisation.

Skills and talent

Since 2012, an increasing number of employees are being equipped with the skills and training they need to succeed in their roles.



Organisational performance is highly dependent on skills and training. As well as giving employees the ability to carry out tasks, skills play an important role in workforce morale improving productivity. These factors are increasingly viewed as being critical to the economy's health.

Employees in 2014 are strongly aware of the impact skills and talent make on their employers' performance and viability. Half (50 per cent) see talent gaps due to cuts and report a lack of recruitment as the biggest threat to their organisation, a significant jump from 37 per cent in 2013. In a similar vein, 46 per cent see a lack of training and employee engagement as contributing to talent gaps. This emphasis, now recognised by employees as a decisive factor an organisation's performance, suggests the emergence of a 'talent-driven' economy.

Asked to consider how well equipped they are with skills, workers appear confident. Almost a quarter (23 per cent) says they do not need any help right now developing their skills or training. However, the data suggests that employees have an eye to the future: 36 per cent – up from 22 per cent last year – understand they will need to retrain to keep pace with changes to their role.

Areas for improvement

Employees identify their top training and skills needs





Only nine per cent of employees believe they do not have the skills or training they need to succeed in their role – a clear decline from 2013, when 15 per cent were not confident they were adequately prepared to perform at work. Where employees say they are pessimistic about the future at work, 12 per cent feel that they have been left behind in the onwards march of new trends, technology and skills.

Flexible working and technology

Following the introduction of the new legislation in 2014, the UK workforce's appetite for flexible working continues to be strong. Over a third (36 per cent) of employees in 2014 would like total flexibility over their working hours, a proportion almost identical to 2013 (37 per cent).

The ability to work when and where they want is seen by employees as the single biggest factor for keeping them engaged in their jobs. Some 30 per cent rank flexibility as the most important factor in motivating them to perform at work.

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As well as aspiring to work more flexibly, the research points to an expectation among employees that their organisations will facilitate more flexibility in the next twelve months. Employees see the ability to work wherever and whenever they choose as the most likely change to impact them.

The right tools for the job

On the move

Technology is transforming working life for most UK employees: 72 per cent say it's changed their role or career in the last year. Here's a breakdown of mobile technologies provided to today's UK workforce.



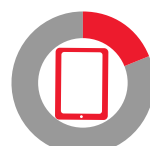
48%



26%



19%



19%



5%

In previous years, our research found the majority of employees did not have access to modern technology. In 2013, for example, 52 per cent of employees were not provided with any mobile solutions. Today, just one in three are not equipped with these tools. We are now truly seeing the transformative impact of technology, with findings confirming that employees are more aware than ever of the power of technology to change working life.

In 2013, 45 per cent of employees reported that technology has changed their role or career to some extent in the past year. In 2014, this figure leapt to 72 per cent. Connecting with the growing emphasis on big data and analytics in the workplace, nearly half (49 per cent) of respondents say their role has seen an increase in information and reporting in the past twelve months.

For many workers, the influence of technology is positive, with 31 per cent of employees expressing that they can now perform their role more effortlessly. The increase in flexible and remote working practices can also be explained by advancements in technology. Its role as an enabler of a more flexible approach to working life is inevitable, freeing people from the traditional constraints of time and place.

Indeed, the research data shows more UK employees than ever have access to technologies that enable mobile working. Most of the workforce has been provided with a mobile, a laptop, a tablet or a smartphone by their employer. Intriguingly, five per cent say they have been provided with 'wearable technology' – a trend worth watching, as innovations such as smart eyewear, watches and fitness monitors become more widely available.

However, the growing impact of technology can be unsettling. Approximately one in ten employees (11 per cent) say technology is making their role more challenging, up from just three per cent in 2013. Whilst technology enables flexibility, in theory giving employees more control over their work-life balance, a significant 28 per cent of the UK workforce feels the lines between work and home are now becoming blurred.



The quality of working life

Employees are paying more attention to achieving a healthy work-life balance than ever, but what do employees value about the experience of working life – and how do they want to improve the quality of their working life? In an economy, where talent is recognised as a decisive factor in success, these become key questions.

Above all, employees care about the quality of working life. Boredom and monotony – “doing the same thing every day” – are cited as the joint leading causes of dissatisfaction, alongside “a lack of praise or recognition”.

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Workers appear to be looking for more from their work: the proportion of employees who expect the future of work to be ‘exciting rather than dull’, rose to 67 per cent in 2014, up from 52 per cent in 2013. One in five (20 per cent) employees think they will look for more meaningful work over the next five years. A similar proportion (19 per cent) believes they will completely change the direction of their career within the next five years, while for 13 per cent of employees a sabbatical break from work is an attractive option, up from nine per cent last year.

Some answers about big data in HR

Through 2014, ADP has been investigating the use of big data analytics in HR, including the introduction of *Big Data in HR – The big questions being asked*⁵ perspective paper.

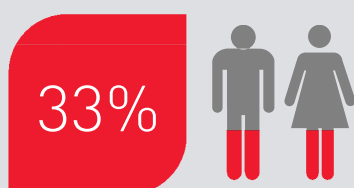
There is an emerging consensus that big data can help guide HR decision-making and enable HRDs be part of the strategic conversation within their organisation. This is already becoming a reality for a number of organisations, as 44 per cent of HRDs are now using data analytics more than they were twelve months ago.

But to what extent do HRDs feel equipped with the skills they need to take advantage of big data?

Contributors to ADP’s *Big Data in HR* perspective paper underlined the need for more ‘data fluency’ in HR departments – and HRDs questioned for *The Workforce View in 2014/15* agree. Reflecting this concern, 15 per cent of HRDs say they are not comfortable with analysing or managing data and, consequently, 44 per cent recognise the need to improve their data skills in the next twelve months.

Workforce welcomes parental leave...

Employees (16-34) that will take advantage of shared parental leave entitlement



Due to come in to effect on the 1st of December 2014, the government's new legislation on parental leave could have a major impact on how families manage working life. The Workforce View in 2014/15 looks in depth at what shared parental leave will mean for employees - and for the HRDs charged with introducing the new scheme in their organisations.

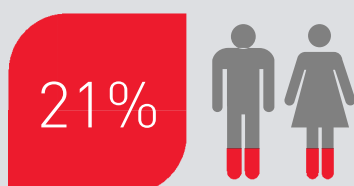
The employee data suggests the workforce welcomes shared parental leave. Approximately one in five (21 per cent) employees, both male and female, intend to take advantage of this. It is particularly attractive for employees aged 25 to 34 years old: 33 per cent of this group aim to take up their entitlement to leave.

Overall, shared leave is more attractive to workers in the public sector, with 29 per cent wanting to exercise their right to shared parental leave, as opposed to just 15 per cent in the private sector.

Will the legislation help reduce gender inequality? Over two fifths (42 per cent) believe so. But perhaps more importantly, for a workforce that cares deeply about flexibility, the same proportion (42 per cent) believe the new legislation will be 'a help' in the workplace.

...but are HRDs ready?

HRDs that aren't ready for the introduction of shared leave



Employees are looking forward to the introduction of shared parental leave, but are employers ready? For the most part, the answer is yes. Research among HRDs finds 69 per cent prepared for the new regime that, at the time of the survey, would arrive in less than three months.

However, more than a fifth (21 per cent) of HRDs say they are not ready for shared parental leave - and HRDs in private sector organisations are twice as likely to say they're not ready than their peers in the public sector (22 per cent versus 11 per cent). The explanation could lie in the fact that only 21 per cent of private sector HRDs anticipate demand for shared leave, whereas half of public sector HRDs say there will be 'a lot' or 'a fair amount' of demand.

The numbers also reveal a disconnect between HRD and employee expectations on this matter. 70 per cent of HRDs predict little or no interest in employees taking advantage of shared parental leave in the first twelve months - while one in three (33 per cent) younger employees say they aim to use their entitlement.

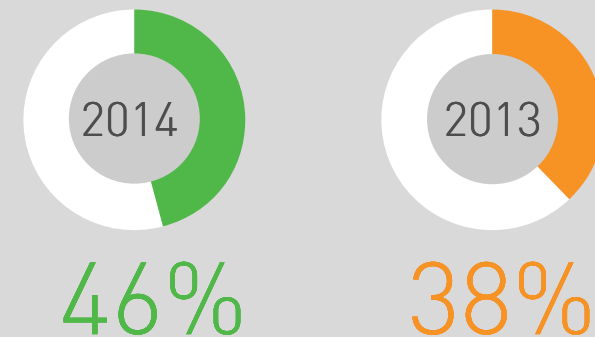
Things are looking up

It is clear from the ADP Workforce View research over the past few years, that things are continuing to improve year on year for the UK workforce.

Key:
● 2014
● 2013
● 2012

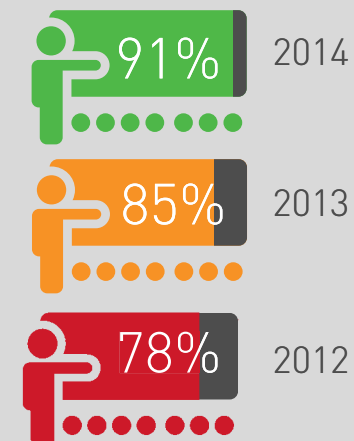
Skills and talent

Employees who see talent gaps & lack of recruitment as the biggest threat to their organisation



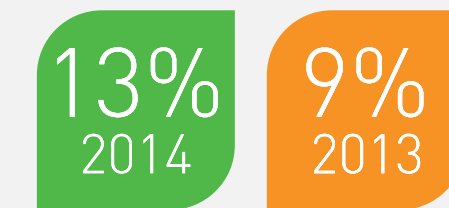
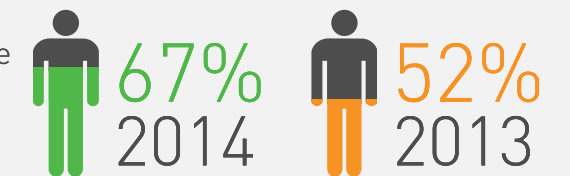
Employees who are concerned that cuts to training & employee investment could endanger their organisation

Employees equipped **with** skills & training to succeed



The quality of working life

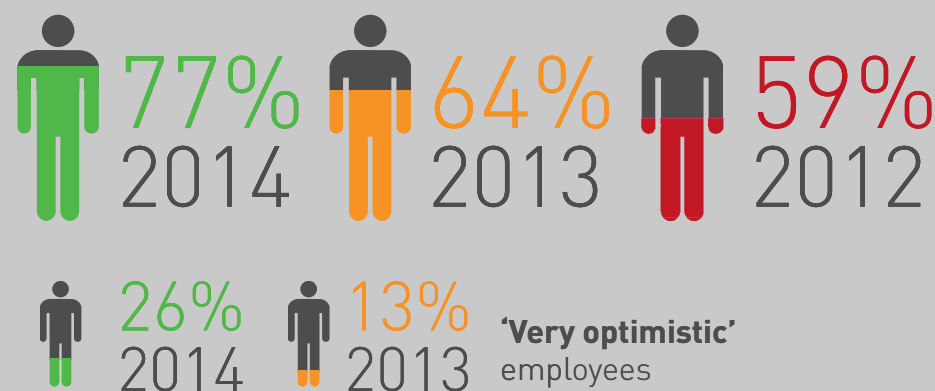
Employees who expect the future of work to be 'exciting rather than dull'



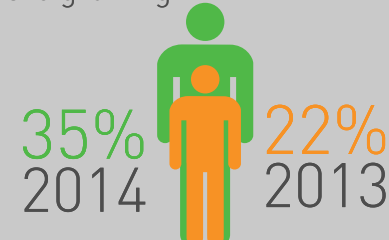
Employees that believe a sabbatical break from work is an attractive option

Optimism

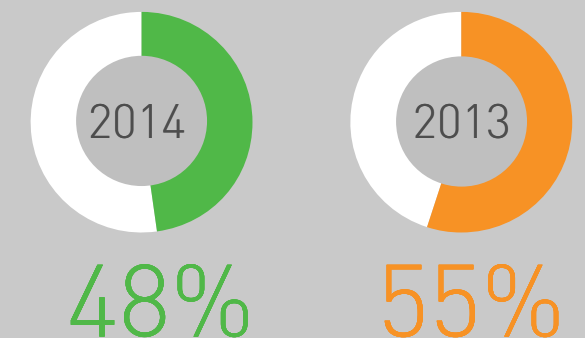
Employees that are 'quite optimistic' or 'very optimistic' about their prospects in the decade ahead



Employees who feel that career opportunities are growing



Employees that feel their organisation is 'quite dynamic' or 'very dynamic'



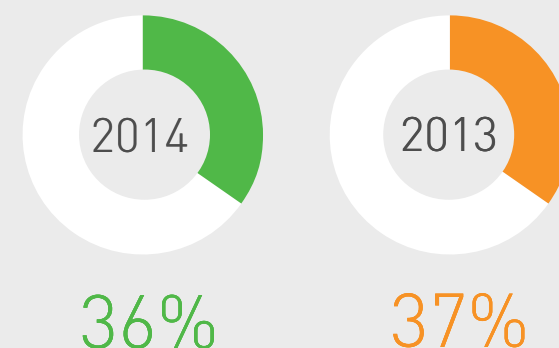
Employees that feel the future of work is 'unpredictable'

Shared parental leave



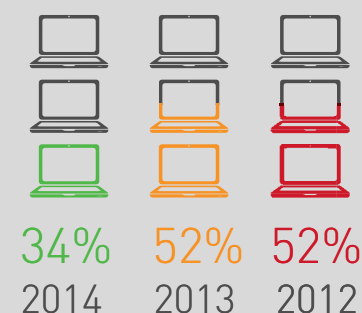
Flexible working

Employees that would like total flexibility over working hours



The right tools for the job

Employees **not** provided with any communication tools



Employees who reported that technology has changed their role or career





The HRD View

As employees become more positive about the outlook for the world of work, HRDs are faced with the challenging task of balancing staff demands. By offering insight into employees' expectations and workforce trends, HR has a significant opportunity to make a real contribution to business success.

In this section, *The Workforce View in 2014/15* investigates the priorities for the year ahead, exploring the strategic concerns of HR professionals.

Top 10 priorities for the year ahead



Talent is top of the agenda

For the second year in a row, 'talent management and retention' emerges as the number one priority for HRDs.

For the second year in a row, 'talent management and retention' emerges as the number one priority for HRDs. Indeed, it still seems to be a preoccupation in 2014, with 35 per cent of HRDs citing it as a major HR challenge for the year ahead, up from 31 per cent in 2013.

Clearly, HRDs are thinking about the sustainability of their organisation – an observation supported by the high ranking given to succession planning, with 33 per cent of HRDs identifying it as a challenge for the year ahead.

HRDs see 'a lack of fresh talent entering the organisation' as the single biggest threat. Almost half (47 per cent) of HRDs selected the scarcity of fresh talent as their number one worry.

But where do HRDs see threats to the talent pool originating from? *The Workforce View in 2014/15* asked HRDs to consider and rank their primary talent challenges. As with 2013, HRDs see 'a lack of fresh talent entering the organisation' as the single biggest threat. Almost half (47 per cent) of HRDs selected the scarcity of fresh talent as their number one worry.

Some way behind in the rankings, HRDs identify threats around cuts or lack of recruitment (39 per cent), a lack of training and employee investment (38 per cent), a drain of talent to direct competitors (38 per cent), and talent gaps due to personnel lost to other organisations (36 per cent).

Employee engagement

The levers for employee engagement



Questions about employee engagement connect directly with concerns about talent – since engaged employees perform better and find satisfaction in their work. *The Workforce View in 2014/15* asked HRDs to rank the factors they believe motivate employees. The findings suggest that HRDs have a good handle on what drives workforce engagement – but there are some important differences.

HRDs appear to place much more weight on 'praise and recognition' as a motivating factor than employees. Asked what motivates them, 30 per cent of employees opt for flexibility and name 'the ability to work when and where I want to' as the most important motivator.



Asked to consider threats to employee engagement, HRDs focus on 'working harder for the same or less reward'. Just over a quarter (27 per cent) of HRDs cite this as the single biggest threat – and it underscores a wider narrative about low wage rises in the UK economy.

However, when HRDs are asked about their current priorities, the picture changes. Just over a fifth (21 per cent) of HRDs identified their chief focus as enabling employees to work flexibly.

Asked to consider threats to employee engagement, HRDs focus on 'working harder for the same or less reward'. Just over a quarter (27 per cent) of HRDs cite this as the single biggest threat – and it underscores a wider narrative about low wage rises in the UK economy.

HRDs believe employees are worrying less about job security, which is borne out comparing 2013 and 2014. In 2013, 24 per cent of HRDs believed job uncertainty could undermine workforce engagement. Reflecting the higher levels of employee optimism this year, this figure has fallen to 17 per cent in 2014.

Technology and talent management

Technology has a marked impact on the workplace and employees are feeling the effects, as 72 per cent of employees believe technology has changed the way they work. But what kind of impact is technology having on HRDs – and how can it help them deal with the challenges they identify around talent management and employee engagement?

The research finds HR professionals making greater use of technology than ever before. Approximately two thirds (67 per cent) of HRDs say technology has changed the way they communicate with the workforce, a small increase from 63 per cent last year.

Asked about the ways technology is used in their organisations, 20 per cent say it enables better collaboration, followed by 16 per cent who say it allows more communication to occur. A further 16 per cent point to technology's role in helping target communication messages more precisely, while 15 per cent of HRDs refer to its ability to increase two-way communication, giving their team a better understanding of employee views.

Conclusion

The story of *The Workforce View in 2014/15* is one of optimism, as employees look forward to the future with more hope and confidence.

Employees now pay more attention to the role of talent in success and, overall, they are confident they have the skills they need to thrive. In addition, a greater proportion of employees than ever before are equipped with mobile technologies that will allow them to work flexibly.

It is an encouraging story, so how can HRDs help their organisations build on the momentum and prosper in a talent-driven world?

Skills and talent

Half the workforce sees talent gaps as a threat and 46 per cent link these to lack of training. While most employees feel adequately skilled now, many expect to need training in the next year. This is an area of continuous review for HR, to ensure favourable conditions so talent can take root and grow.

Flexible working

The appetite for flexible working is stronger than ever – employees enjoy it and indeed expect it. The ability to work flexibly is seen by employees as their single biggest motivating factor. By enabling more opportunities for flexible working, and ensuring employees understand what options are available to them, HRDs can help their organisations become more agile and improve employee engagement. This will in turn lead to greater talent retention.

The right tools

More organisations are giving their people the tools they need to work flexibly. However, the speed of technological change means new possibilities arise continuously. The IT department is HR's best friend in making sure that the organisation has modern and adaptable technology solutions in place.

The quality of working life

The findings suggest that employees in today's organisations are more aware of the quality of work-life balance. From an HR point of view, this probably goes further than ensuring employees can take advantage of flexible working conditions. As employees spotlight boredom as a threat to their engagement, introducing initiatives that stimulate them and help them develop at work should be on HR's priority list for the coming year.



Afterword

The Workforce View 2014/15 shows a working population transformed from that we saw just a few years ago. It is immensely encouraging to hear that so many businesses and employees are feeling optimistic and excited about the current situation and their futures at work.

But smart HR professionals won't be resting on their laurels – it is their job to think about the future. How can they maximise the current positive sentiment and favourable economic conditions to help ensure future growth? What challenges are they likely to face down the road? This year's Workforce View provides some useful insights to help HR to answer these questions, enabling them to plan and prepare more effectively for the months and years ahead.

“One increasingly important factor in keeping staff engaged is giving them the flexibility to work when and where suits them and employers must embrace new ways of working to allow this to happen.”
Steve Hardy,
Vice President,
Corporate
Marketing at ADP

For me personally, there were a few key points and themes that emerged as being absolutely crucial to take on board.

Firstly, while optimistic employees are generally productive employees, increased confidence also means they are more likely to look elsewhere to further their career. This means it is more important than ever for employers to consider the best ways to engage, motivate and retain staff. Employee preferences are constantly changing, with new generations entering the workforce, so it is crucial to stay on top of the factors that will ensure their loyalty for longer.

One increasingly important factor in keeping staff engaged is giving them the flexibility to work when and where suits them and employers must embrace new ways of working to allow this to happen. No longer a 'nice to have', flexible and remote working are now demanded by employees and could mean the difference between attracting and retaining the best talent and losing them.

Flexibility and technology go hand in hand and we have once again seen a rise in the prominence of IT, allowing an even more fluid approach to work. Employees are increasingly being given the tools to work as they wish, but what's next? Mobile HR is already high on every savvy HR professional's priority list, meanwhile wearable technology, smart connected devices and the Internet of Things look set to have a dramatic impact on business generally and HR more specifically in the years to come.

Finally, employers must not forget the importance of continuous training and development, which may have been overlooked in the leaner years. Not only will this help to engage and motivate employees at all levels of the organisation, it will also help plug those all-important skills gaps, reducing the need for expensive external recruitment.

It is certainly an exciting time and with new buoyancy in the market, HR has the opportunity to move from fire fighting to value adding, with a raft of new tools and innovations at their disposal. Time to once again start thinking big and imagining the possibilities that lie ahead. Doing so will ensure that HR really fulfils its potential and drives business growth for years to come.

Steve Hardy, Vice President, Corporate Marketing ADP



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Notes



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