BEST PRACTICES: How HR can become a business partner

Part Two: Being Visible

XpertHR shares insights on how to effectively execute strategy.
What does it take for HR professionals to get that coveted seat at the table? How can they move beyond being viewed as the work cop or paper pusher to successfully further their role as strategic partners? XpertHR stays on top of the trends and issues in human resource management.

We know that there are plenty of HR professionals who have assumed that coveted, strategic seat at the table, who are viewed as strategic partners and who are involved at an early stage in important decisions that impact the future success of the companies they work for. But, we’re also aware that there are a number of HR pros who continue to be challenged to assume strategic roles for a variety of reasons.

So we decided to reach out to some of our contacts to ask them some questions about exactly what’s involved in taking a strategic approach to HR, what HR practitioners need to do to increase their visibility, and how HR practitioners can effectively demonstrate the bottom-line value they provide.

We spoke to the following professionals:

- Beki Lischalk, SPHR, CHRO at Kitsap Mental Health Services
- Amber James, SPHR, HR manager with Hunton & Williams, LLP
- Marilou Idland, vice president of HR at South Central Indiana REMC
- The senior HR director for a technology and hardware company
- The regional HR manager with a national law firm

Here’s what they had to say about HR gaining visibility:
Part Two: Being Visible

When you think back office, you think HR; they’re the people who set you up, configure your work status, and cut the checks. While these will always be integral roles to the HR function, today’s business environment requires HR professionals to take on increasingly more strategic roles. In fact, they must, in order to ensure their ability to grow and develop within the organizations they serve.

The need for that shift was pointed out in a 2014 study “Human Resources Technology and Service Delivery Trends in 2014,” cosponsored by Information Services Group and the HRO Today Services and Technology Association. Study results indicated that the top area for HR organization focus in 2014–2016 was “strategic alignment to the business,” with 32 percent of the respondents identifying that priority; the next highest area of suggested improvement was “talent acquisition and retention” at 19 percent.

Clearly there is widespread recognition that the HR role needs to be more strategically aligned within the organization—not as a service department, but as an integral partner in business operations. That requires strong relationships, credibility and senior leadership support. All of these can be driven by increased visibility for the HR function and its staff members at all levels.

Unfortunately, many HR professionals feel that they’re simply not ready to rise to the challenge. In Bersin by Deloitte’s “Global Human Capital Trends 2015” report, only 6 percent of the HR executives responding felt they were ready to address the leadership issues that faced them. The survey revealed significant gaps in terms of the issues that respondents felt were important and their assessment of their own readiness.

Talent Trends: Global Importance vs. Readiness

![Talent Trends Chart]

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It’s time to close those gaps.

One challenge that HR often faces, says Marilou Idland, vice president of HR at South Central Indiana REMC, “is that, oftentimes, HR can be viewed more as the police or the disciplinarian, versus the partner.” It’s a challenge that HR pros need to work to overcome, she says. One thing that Idland has done is to make a concerted effort to work with managers by interacting with them, and their team members, as often as possible. “If I can talk with teams more often about things that are important to them on a daily basis, then the less it looks like our department only comes in when there’s a problem.”

In addition to being visible among the masses, says Idland, it’s important for HR professionals to also make sure that they’re interacting with senior leaders on a regular basis. Being visible, of course, is only a plus, if you’re “very good at your game,” says Idland. “If your whole HR staff is really good at their game, that gives the presence of professionalism—it’s knowing what we’re talking about and looking through a pretty clear glass ball of what might be coming down the road.”

Beyond HR

As we discussed in the first part of our series, “Having an Active Role,” it’s important for HR professionals to engage themselves strategically with other parts of the organization in ways that can make a positive impact. Doing this, of course, requires taking off the HR hat and putting on the hats of other functions—looking through lenses that might include finance, operations, compliance, and more.

“One being too HR-focused or HR-centric causes us to tend to not have the credibility at the table, which is why, I think, sometimes we’re not invited to the table,” says the senior HR director for a technology and hardware company. “When I finished my bachelor’s program, I actually decided to go get an MBA and focus on finance, rather than getting a specialty in HR.” That shift in focus, she says, has been very beneficial for her. “I started participating in quarterly financial reviews and now, in my current role travelling globally and meeting with people within the offices, I have a better understanding of the challenges they face, and how HR can help them.”

It’s good, she says, for HR to take steps to move beyond the tendency to be too rule- and policy-focused. “That doesn’t always go over very well because we tend to have the perception that we’re out of touch with the reality of business operations.”

This is something that HR professionals can do immediately when stepping into their roles, she advises. During the first 90 days on the job, she recommends that HR professionals make an effort to “talk to the business leaders, not so much about HR types of things, but more about what these leaders do—what are their business challenges? Who are the key competitors in the marketplace? Where do they see the company going in 3–5 years? What’s going to hold them back from achieving that direction in the next 3–5 years?”

That early communication can go a long way toward positioning the HR function as more broadly business focused. “People will understand that you’re interested, and that will help build
credibility,” says this senior HR director. “They’ll start including you in conversations or asking your opinion on things that are not just about process or procedure in HR.” That’s how, she says, HR pros can become true business partners.

She points out that other functional leaders in the organization also have concerns about their own visibility, and HR can play a role here, as well. “Some of the supervisors and managers that I’ve worked with are promoted very quickly based on their tactical expertise, or their technical expertise, and not their leadership or strategy expertise. So they’re struggling just like the rest of us with ‘how do I gain credibility with senior management?,’ ‘how do I become visible?’ They tend to find it very helpful to have a good, strong relationship with the HR team, especially if the HR folks have that business knowledge, and they can have a strong conversation about business operations.”

**Being Proactive**

While many HR professionals lament their lack of involvement in key business issues, far too many fail to do one very important thing: ask to be included, says Beki Lischalk, SPHR, CHRO at Kitsap Mental Health Services.

“We need to make sure we’re involved in things at the right level, rather than waiting for folks to contact us at the crisis point,” she says. Lischalk has found that establishing relationships with staff and supervisors proactively can help to lay a foundation for their support when issues arise. That support can take the form of skill building, policy explanation, training, and other types of outreach including strategy and future planning she says. Yes, it can be challenging, especially for those HR organizations that support multiple facilities. But, she says: “We use email, voicemail, rounding and quarterly all-staffs. We are visible via multiple methods, as are other members of Leadership and the HR team.” In addition, she says: “Periodically I attend team meetings to address issues or answer questions, and some of my team does as well.”

Being proactive also involves staying one step ahead of legal requirements. There’s a big difference from an employee perspective, in employers who simply change their practices when laws and regulations dictate that they do so, and organizations that are continually thinking about how they can best serve their employee populations, staying a step ahead of what the laws require.

For instance, minimum wage requirements are a frequent topic of discussion and likely to be the target of new regulations in 2016. Is your company waiting for those regulations to emerge, or are you proactively examining your pay practices to ensure they are fair, competitive and strategically designed to engage a loyal and productive workforce?

It’s the difference between an employee response of: “Wow, the company really respects us,” and “Oh, thanks for giving us what you’re legally required to.”

Developing an HR calendar can be a good way to stay ahead of things from a communication and visibility standpoint, not just to include HR-related activities and announcements, but key organizational dates as well. For instance, you wouldn’t want to schedule annual mandatory
ethics training during a busy time in your call center. Being cognizant of key business events and working to schedule HR activities and announcements around them is not only being strategic, but it can go a long way toward building positive relationships with business units.

**Making the Business Connection**

It is also important for strategic HR leaders to make the business connection between HR-related policies and issues and business operations. For instance, HR professionals can work with business leaders as they work on new deals or contracts to ensure that their pricing takes into account HR-related impacts—like minimum wage increases—that could affect their pricing. It’s a matter of thinking beyond the purely tactical HR implications to making the connection with the business and ensuring that your HR practices are aligned with business needs—helping the company to meet its goals and objectives.

Taking that type of business first approach can go a long way toward helping HR earn those coveted seats at the table. HR can benefit significantly by taking such a proactive approach, aligned with the business needs of their organizations’ managers.

The senior HR director for a technology and hardware company understands that if employees are concerned about anything that takes their focus away from their work, they won’t be as productive as they might be. That’s a clear area of business operations that HR can readily support, she says. “We want to ensure that employees continue to be happy and engaged. We want them to focus their time on writing code, writing software—we don’t want them to have to worry about external types of things.” Toward that end, she notes, the company pays 100 percent of medical insurance for employees and dependents and has a “very generous” PTO plan. “We want them to have the best medical care they can have—we don’t want financial burdens to be a consideration for them,” she says. “It’s great for your company brand, and being an employer of choice, if you offer above and beyond the statutory requirements,” she notes. For global companies, that requires considering local variations—not all benefits will appeal in all locations, she notes. “Globally, the people in UAE are not concerned about the same things, not motivated by the same things, as people in the UK or US or Canada.”

HR does a lot of good work, as these examples illustrate. Too often, though, that work goes unnoticed because HR professionals simply aren’t taking steps to make their presence—and their efforts—known.

**Making Your Presence Known**

Amber James, SPHR, is an HR manager with Hunton & Williams, LLP. At a very basic level, being visible simply requires using available communication tools and channels to ensure that HR is reaching out and making connections in multiple ways, says James. “It’s about walking around, providing frequent and clear communications, picking up the phone to call rather than sending an email—going to someone’s desk rather than picking up the phone, if you can. It’s being able to get face-time as often as possible and finding reasons to do that.”
These simple actions, says James, can help boost the odds that “senior leadership wants you to be there at the table to share your opinion. It helps them put more value in HR. It’s noticed and trickles down into the organization.”

Communication is critical, agrees the regional HR manager of a national law firm. “I think it’s critical, critical, critical for rolling out any initiative, getting any information across to any level of professional in the organization; it’s critical.” It’s challenging, though, particularly for law firms, she says, which tend to be more conservative than innovative. “Our form of communication is email. We are still stuck on conversation; we are stuck on face time, so we don’t use a lot of other avenues to communicate with each other, and I think that’s to our downfall. We’re simply slow at embracing other forms of communication.”

Idland also says that email is her go-to tool for communication. “It’s easy, do-able and always a good thing,” she says.

Relying on face-to-face communication is not a bad thing, notes the senior HR director for a technology and hardware company. “The philosophy of the company is they want people to be visible and having verbal conversations,” she says. “In the technology age, we do email, and we have an intranet page and those sort of things; we try to really have people have opportunities to connect.” Particularly because the company is international, says the regional HR manager of a national law firm, they are exploring options like affinity groups that might help those who may be struggling to understand the new cultures they find themselves in. “When people are coming here from India, or from Africa, and they are struggling to understand,” she says, “having that support structure goes a long way with helping them be happy in their job, feeling there is a support structure.”

Both communication frequency and focus are important, notes Lischalk, who says that old acronym, WIFM—what’s in it for me—is a good starting point. “You need to include, for staff, how they will benefit whatever the topic may be,” she says. Sometimes it can be challenging to come up with benefits that resonate. For instance, she recalls, “we went smoke-free earlier this year. Yes, it was a sacrifice for the smokers; but we also offered a smoking cessation program, at no cost to them, to provide them an opportunity to quit smoking,” she says. That was a benefit that many were interested in. And, those who participated in the Smartquit program had the opportunity to take advantage of non-smoking premiums that were rolled out in fall 2015.

In addition to supporting the initiative through communications that appeared on bulletin boards, and through rounding, Lischalk also sent out weekly emails, congratulating (without using names) the number of staff who had completed the program, and encouraging those who had not. “We have to use multiple methods to communicate. You can never over-communicate—you’ll find you send emails out six times, and you’ll still hear from someone, ‘well, I didn’t know that!’”

Crisis situations also present opportunities for HR to make their presence known, Lischalk notes. “We had a crisis a few weeks ago, and debriefings where conducted. I attended to hear staff concerns and observe how that meeting went, and to remind attendees of our EAP and different aspects of support available to them.”
Importantly, HR must get out from behind their doors and desks to make their presence known, at all levels of the organization, in meaningful ways that go beyond policy, procedure and policing.

**Dealing With Multiple Locations**

When staff members operate out of multiple locations, the challenges for HR to ensure that they remain engaged—and that HR remains visible—can increase exponentially.

Despite the distance, says Lischalk, personal visits can go a long way toward strengthening relationships and HR credibility. “I think making rounds can be valuable as well,” she says. “I also do the ergonomic assessments for staff, which I enjoy because it’s a positive, improves the staff’s workstation, and gets me involved directly with the staff.”

Multiple locations also means multiple messages. Each communication must start with considerations of the scope, the audience, and the result you’re hoping for. For example, policies related to compensation issues are obviously going to vary by location—both within and outside of the U.S. That requires messages to be customized for each location to ensure that local needs are being addressed.

Having plans in place that take these considerations into account, proactively, can help ensure the right messages get out at the right time to the right people. It may make sense for the organization to outline different communication and policy roll-out processes, depending on the issue being addressed. For example: a process for a general, global communication; a process for communication specifically for managers; a process for communications that require local customization, etc. Proper timing of communication is also important; for instance, managers need to get information before employees, so they’re prepared to respond to questions they may receive. Providing managers with links, FAQs, talking points, and time to read can help them get prepared. Don’t overlook HR staff in this process; ideally they should be one of the first audiences to receive these communications so they’re prepared to deal with questions they may receive from internal clients and business leaders.

**Communicating with Supervisors and Managers**

Supervisors and managers are generally the first line of contact with employees in most organizations. Consequently, they need to be both well informed and well trained to ensure that they are providing appropriate oversight in a supportive and consistent way that is in alignment with both internal and external rules and requirements. There are a lot of moving parts to manage, obviously; HR must ensure that their communications with these front-line managers are timely, appropriate—and well received.

These communications can be both formal and informal, notes the regional HR manager of a national law firm, who says, “One of the things we’re planning to do is start having, in our individual offices, meetings with those line supervisors—just lunch meetings where HR is present and we’re talking about our expectations, so that we can at least just start the conversation.” That
creates a much better climate than only coming to them when there’s a problem, she says. “So far, the feedback I’ve gotten from our line supervisors has been very positive. They’re dying for this kind of interaction.”

Idland notes that ongoing training—whether formal classroom training, or simply conveying information via a newsletter—is very important, adding that the resources she receives through XpertHR have proven very helpful here. External resources, she says, “show that it’s not just this company, or just this industry, but something that everyone needs to be aware of. I think it’s good for them to see it from the outside, not just hear about it from the HR department.”

Involving managers in the process of determining what type of communication, support and training is needed can be another good way to boost credibility and build relationships. “Being a very technical company, we do tend to play a little bigger role with that than other organizations I’ve worked with,” says the senior HR director for a technology and hardware company. “We will try to engage the client group in each division and see how can we best help them from a communication standpoint.”

This HR director’s organization also has a leadership academy, she says, that provides resources and training on the core competencies and behaviors expected by the organization. “If they’re managing people remotely, they’ll get some tips and tools on how to manage people remotely. There’s a wide variety of different topics—even productivity types of tips and tools like ‘how do I manage email most effectively?’” These one-on-one interactions between business units and HR partners go a long way toward building positive relationships.

Lischalk agrees. “It’s those personal connections. Rounding is really important, and our CEO has encouraged leadership to make rounds throughout the agency and share the different learnings that we’ve had.” In addition, says Lischalk, because of the type of work they do and their client base, ongoing training is critical to ensure compliance. “We do extensive trainings, including extensive regulatory trainings for mental health care staff in the state of Washington. After each of our trainings, we obtain feedback from the attendees on their impressions of the training—what went well, what could be done better?” Supervisors and managers need to be well versed on these issues, so that they, in turn, can help to support and educate employees.

Connections with Senior Leaders

Strong relationships with staff, supervisors and managers are obviously important to any HR organization. But, particularly for those HR professionals who hope to rise in the ranks of their organizations, fostering relationships with senior leaders is equally critical.

“I make a point to be around the board of directors to have opportunities to talk with them about general HR things, as well as looking as far forward as I possibly can for them” says Idland. She does the same with her executive team. “I want them to be able to react, or think about the HR aspects, when they’re thinking about business issues, so that it all comes together. It’s not like they should be making business decisions and then HR comes in and says, ‘Oh, no, no, no, that’s not going to work.’ I try to be a little bit ahead of them if I possibly can just to help equip them with a little bit of knowledge of what the effect is on the HR side.”
Sometimes, it also helps to get the C-suite “at the table,” notes the senior HR director for a technology and hardware company. “I’m in charge of compliance, and we have a compliance committee,” she says. “Having senior level people within that compliance committee is really where we get together to talk about what policies are needed for the company, and whether we have any compliance issues as a company we need to engage in.” HR takes a leadership role in facilitating those conversations. HR is really pulling the experts together for their expertise, so we can develop those policies.

Despite the relentless drumbeat of those who question the value of the HR function, it’s a function that is not going away any time soon. In fact, the need for strategic HR management is on the rise—fueled by increasing competition, globalization, rising demand for talent and the significant impacts that technology is having on organizations’ abilities to remain nimble and to ensure that staff members are continually up to date and trained in new methods and approaches to doing their work.

The need is there and the opportunities are there; it’s time for HR to close the gaps between the significant global leadership and talent needs that face them, and their own perception of their readiness to meet those needs. Enhanced visibility is a good first step.
Key Takeaways

- Having visibility across the organization—regardless of how large, or geographically dispersed the organization is—is a must for today’s HR professionals.

- It’s not enough to wait for an invitation to engage and rise to the occasion; HR pros need to be proactive when it comes to reaching out to connect with others, asking to be part of teams and conversations and, yes, asking for those proverbial seats at the table.

- While today’s technology means that communication can take place across a variety of channels and through a variety of means—and those tools should be leveraged—face-to-face communication is still cited as the best means of building strong relationships.

- As HR interacts with others throughout the organization, it can be helpful to take off their HR hats and, instead, seek to learn more about other operational areas, and the issues and concerns they face.

- A future-oriented focus can help HR get ahead of issues to ensure that their organizations are well positioned both as employers of choice and within the markets they serve.

- Communication frequency and focus are critical. HR should use multiple means to get messages in front of key audiences, but must also carefully consider when different messages need to be created to address unique and disparate audience needs.

- Business is the bottom line at any organization, and it is precisely that bottom-line business focus that will help HR gain visibility—and credibility—in the organizations they serve.

There are a lot of demands on HR professionals today, but they’re not alone in attempting to meet these demands. XpertHR is one go-to resource that can help guide HR practitioners at any level as they navigate the continually changing HR terrain.
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