



Human Resource Strategic
Planning

AMT HR Webinar Series #1
January 2022



**Alliance for
Manufacturing
and Technology**

Agenda

- Welcome/Introductions
- Survey - Complimentary Assessment
- Benefits of Strategic Planning
- Development of HR Strategy
 - Assess the Current Situation
 - Envision the Future
 - Develop Objectives
 - Monitor and Evaluate
- Next Steps
 - Plan to Plan
 - SWOT
 - KPI's
 - Owners

HR Assessment Survey

- AMT will follow up with you to schedule a complimentary assessment
- Don't worry if not 100% complete
- Benchmark data collected, shared in summary.
- Include company name on last question.

Why HR Strategic Planning?

The closer the alignment between HR and an organization's overall business strategy, the better the company's ability to anticipate and respond to customer needs and to maintain competitive advantage.

SHRM

Scope of Strategic Human Resources – Talent Management

- Workforce Readiness
- Job Analysis
- Sourcing and Recruiting
- Hiring Practices
- Retention
- Legal and Regulatory Issues
- Metrics

Scope of Strategic Human Resources – Workforce Development

- Coaching - OTJ Training
- Cross-Training
- Succession Planning
- Diversity, Equity & Inclusion
- Performance Management
- Leadership Development

Scope of Strategic Human Resources – Compensation & Benefits

- Pay Policies
- Retirement Income/Pensions
- Health Care Benefits
- Leave
- Workers Compensation
- Unemployment Insurance
- Educational Assistance
- EAP

Scope of Strategic Human Resources – Employee & Labor Relations

- Organizational Culture
- Employee Involvement
- Measuring Attitudes
- Policies & Procedures
- Discipline
- Unionization/Collective Bargaining
- Communication

Scope of Strategic Human Resources – Risk Management & Safety

- Safety Program Design
- Hazard Prevention & Control
- Workplace Safety & Security
- Training
- Emergency Response

The Magic Coffee Table

https://www.youtube.com/watch?v=-_kXIGvB1uU

Before you get started...

- 1) Understanding of overall business strategy, having a seat at the table.
- 2) Access to resources.
- 3) Communication Plan

Communication Strategy

- **Communication cascaded to entire team.** Timed for standardization.
- **Communication inward to leaders.** Feedback sessions (Surveys). Leaders need to know what's working.
- **Leadership support of decisions made by subordinates,** empower decision makers, define it.
- **Free flow of information across organizational boundaries,** which can support collaboration.
- **Allow team members to connect their work to the strategy.** Employees must be able to connect strategic goals with daily jobs. Why!
- Remember, leaders who do not listen are soon to be surrounded by those with nothing to say.

Generational Outlook

<https://www.youtube.com/watch?v=XCZLNhtiGX0>

Developing a Strategic HR Plan

- Correctly assessing staffing and skills needs and identify relevant training.
- Developing competitive pay and benefits.
- Managing performance/rewards system that keeps employees motivated.
- Knowing what competitors are doing.
- Providing training, including ethics, which reinforces corporate values.
Create/maintain trust. Local trusted representative.

4 Questions...

- 1) Where are we now? (Assess the current situation.)
- 2) Where do we want to be? (Envision and articulate a desired future.)
- 3) How do we get there? (Formulate and implement a strategy and strategic objectives.)
- 4) How will we know if we are on track toward our intended destination? (Establish a mechanism to evaluate progress.)

ASSESS THE CURRENT SITUATION (A)

- Understand the various organizational functions and recognize the short/long-term implications of HR decisions.
- Understand your business basics, including finance, marketing, sales, operations and IT.
- Develop and exercise analytic skills directed at "the why" as well as "the what or how".
- Conduct a strengths, weaknesses, opportunities and threats (SWOT) analysis of the organization.

ENVISION THE FUTURE (B)

- When the HR strategic planning team has fully evaluated the current situation, it should consider what the ideal future would look like from an organizational perspective.
- The question "Where do we want to be?" can be answered and clearly articulated by creating a vision statement. A vision statement provides a description of what an organization wants to become or hopes to accomplish in the future. An effective vision statement paints a mental picture of the organization's preferred future that is inspirational, aspirational, compelling and concise.

DEVELOP STRATEGIC HR OBJECTIVES (C)

- Have the benefits of obtaining the defined objectives been outlined and communicated?
- Do employees throughout the company understand how these objectives affect them and how they contribute independently and collectively to the defined objectives?
- Are the strategic objectives realistic? Unrealistic objectives typically result in disappointment or failure.
- Have timelines for completing objectives been set?
- Will the organization realistically be able to identify the success or lack of success in the accomplishment of strategic objectives?
- Can the HR strategic objectives be linked back to the overall business strategy?

The SMARTER Method for Objectives

- **Specific.** Focused on a narrowly defined activity rather than a generalization.
- **Measurable.** Capable of objective measurement.
- **Attainable.** Requiring effort but within reach given effort and the right tools and support.
- **Relevant.** Producing an outcome that is in the line of sight with the goal.
- **Timebound.** Subject to evaluation within a reasonable and defined time frame.
- **Evaluated.** Assessed at the designated time or interval.
- **Revised.** Changed to reflect what has been learned. **Fail Small, Fail Cheap.**

MONITOR AND EVALUATE (D)

- The final step should be establishing a mechanism to monitor and evaluate progress toward the achievement of strategic objectives.
- Most organizations conduct periodic reviews for this purpose. These reviews do the following:
 - Determine whether the organization is on track to achieve key objectives.
 - Provide the opportunity to identify and adapt to significant changes that affect the strategic plan.
 - Update action priorities.
- HR organizations may find that systems or tools such as balanced scorecards, benchmarking and dashboards are helpful for monitoring results.

Common HR KPI's

- Absence Rate
- Cost per Hire
- Injury Rate
- Turnover Rate
- Open Positions
- Time to Hire
- Span of Control
- OT per FTE

Measuring Strategic Performance

- **Effectiveness.** Is the initiative accomplishing the objective?
- **Impact.** Is the initiative helping to move the organization toward its strategic goals? An initiative can be effective (meet its objectives) without producing an impact.
- **Don't measure everything.** Focus instead on performance that supports strategic goals.
- **Blend awareness of past, present, and future performance in creating objectives.**

Mistakes to Avoid in Strategic Planning

- Taking shortcuts.
- Little follow-through.
- Overreliance on the comfortable and familiar.
- Insufficient involvement from the organization.
- Inadequate communication.

NEXT STEPS – CREATING HR STRATEGY

- PREPARE AND PLAN
 - Conduct organizational survey
 - Get org chart, overall business strategic plan, employee handbook, old employee surveys
- ASSESS THE CURRENT SITUATION
 - Review Business Strategy & KPI's
 - SWOT
- ENVISION THE FUTURE
 - Vision Statement
- DEVELOP STRATEGIC HR OBJECTIVES
 - Identification of KPI's
 - Implementation Plan / Sustainability
- MONITOR AND EVALUATE
 - If you can't measure, you can't manage it.

Raymond Hadley – HR Strategic Planning Project

- Participants
 - Jacinto S. Maratea - CEO
 - Gianni R. Maratea - CFO
 - Elliot P. Dutra – COO
 - Carrie Vaillancourt – HR Generalist
- Assumptions
 - Recruiting Challenges
- Findings
 - Ongoing Surveys
 - Retention Challenges
- Strategy = Total Compensation Project:
 - Pay Policy
 - Performance Management
 - Succession Planning

One Final Thought...

- The grass is greener where you water it...

Next five sessions

Attraction and Retention, 2/11/22, 11am

Workforce Training and Development, 3/11/22, 11am

Compensation and Benefits, 4/8/22, 11am

Employee and Labor Relations, 5/13/22, 11am

Safety and Risk Management, 6/10/22, 11am



Jeff DuBrava - Director Client Services – jdubrava@amt-mep.org

Wayne Smith – Principal Consultant – wsmith@amt-mep.org