

How to Get the HR Resources You Need

By Showing Leadership the ROI
They Want—In 5 Steps



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Written in conjunction with experts from Audacity and revised to focus on the specific needs of Human Resources professionals. This eBook details the process and steps for gathering and measuring information in order to prove ROI for the HR / People Operations function.

This eBook:

- Provides a template for gathering data and measuring success
- Identifies the skills and traits your team will need for success
- Shares test projects to help your team work together while providing measurable outcomes to leadership

The Job

You did it! You landed that new job as a leader of Human Resources, or as we're seeing more recently, People Operations. As you're settling into your new office, the CEO comes in to welcome you. She says the whole team is looking forward to improving the company's employee experience. She's prepared to give you what you need to start. All she needs is for you to tell her what resources, information, and people you need to succeed. Cue internal doubt and panic. Where do you begin?



The Easy Option

As you consider how to best lead your organization's HR efforts, you debate whether to start off with the easy, quick wins. Create team-building events. Show off the great benefits and perks the company offers; remind everyone about planned vacation days; make flashy flyers for the Corporate Holiday Party.

Let's be honest, though. Things of this nature are fun, but not essential. You will not receive the support you need when your function is not helping the company succeed. Your function may even be on the short 'cut' list when tough decisions need to be made. As you begin to assemble the list of resources you need to succeed in your new role, you know that the easy option will not produce the impact you desire. It will not give your business and employees what they deserve. You need a different approach.

The Better, But More Challenging, Approach

As an HR leader, you face two main challenges:

1. Your department can be mistaken as the administrative or the "scary" department: the one people go to when they are in trouble, or having personnel issues.
2. You must prove that your department is part of the organization's culture and experience. You need to demonstrate that HR has the power to improve the company's performance strategically. You also need the data to show that your efforts have been effective.

Luckily, you can solve both these challenges together.

Where You Want to Go

(For the Visual Learners)

It Begins With a Plan

After deciding to use this opportunity to put your HR function on the company's radar, you need to make a plan. There are five steps to follow:

Step

1

The Data

To demonstrate your strategic value, you need to start with data. Any information the company can provide on the following areas will help you know where to focus your early efforts:

- Employee Retention Rates
- Employee Performance Metrics by Location
- Recruitment Stats (Cost per New Hire, Average Length of Recruitment Time, Average Onboarding Time, Difficult to Fill Positions, etc.)
- Employee Feedback (Collected during Exit Interviews, Surveys, and other HR Exercises)
- Safety and Quality KPIs
- Employee Engagement/Satisfaction/Experience Scores
- Employee Demographics Trends, including Diversity, Equity, and Inclusion
- Compliance Metrics (What did the last HR audit uncover?)
- Competency and Skills Gaps
- Return on Investment in Talent Management Initiatives

After receiving the data above, you can assess which of the company's immediate needs Internal Comms can get to work improving.

Step

2

Business Goals
and Leadership

Along with the data, HR needs to know leadership's business goals. The data may show issues with a specific service, but perhaps executives plan to end that service before the year's end. Without knowing the company's goals, direction, and values, your efforts will be isolated, perhaps even misguided.

One of your duties as the new HR leader is to help the leadership team realize that you're an integral member of the team who helps them achieve their business goals. Pairing the company's direction and ambitions with data collected from Step One helps you form a solid idea of where your help is needed, perhaps with unique insights that the leaders themselves can't easily see.

Before you start framing your strategy, however, you need to know your neighbors.

Where You Want to Go

(For the Visual Learners)

Step 3

Internal Communications, Marketing, and the Employer Brand

As the People Operations leader, you'll communicate key HR information and content with employees through various channels. Internal Communications (IC) and Marketing are likely in the habit of communicating with employees in various ways. If your organization has an IC department, you'll want to partner with it to formulate guidelines about what can and can't be communicated. The two departments can establish what should be communicated from HR and what should come from IC. HR will also need to collaborate with IC on developing rules about when, where, and how to share information. Meanwhile, Marketing will have a distinct brand voice developed for the company, contributing to the Employer Brand and overall corporate culture.

You'll collaborate on developing a unique Employer Brand for the company, one which complements the company's external brand and aligns with the company's culture and values. Your neighbors in Marketing and IC will have insights and can provide direction in this area. Take some time to learn from them. Share some of your goals and remember to be humble as you ask for information and insights. To have your suggestions taken seriously, acknowledge your place as the new employee on the block. You're there to partner with them, not replace them.

In Step One, you gathered data about employee demographics and attitudes, which should inform the communications content that HR, IC and Marketing curate. Marketing can share the company's current brand guide and voice, and IC can provide effective employee-centric content. From there, work with IC and Marketing to hone a relevant Employer Brand given the desired corporate culture and types of experiences that your organization wants for its employees. The Employer Brand can be used to set the organization apart from other employers, thereby guiding the overall employee communications and culture-activation system.

After speaking with IC, Marketing, and leaders, you may believe all three need to modify their approaches. However, the best way to have your opinion heard is to make a good first impression. Use the information you now have to get started, and jot down your ideas to come back to in the future. People are always open to new suggestions AFTER you do great things with — and for — them.

Where You Want to Go

(For the Visual Learners)

Step 4

The Strategy

There are several areas where HR can help the company. But first ask yourself: which areas can be measured on a shorter-term basis that will have the most impact? Short-term does not mean days. Ideally, you will find a specific issue that you can attack one section at a time, or one that has multiple layers that can be taken care of individually.

Why is this important? Is HR only good at short-term solutions? Not at all. But at first, HR may need to start with a lean team and minimal resources. It must make a big impact before HR's strategic value is established. Imagine you're able to find a small problem with a measurable solution that can be achieved in a short amount of time. Then, you can have a nice demonstration of the greater impact your department can have when used effectively on a grander scale.

Suppose the company's employee retention rate is dropping more than the industry average every year. Don't try to fix that for the entire company all at once. Instead, find a particular location that is performing worse than average and address the problem there. Maybe leaders are unhappy and turn over faster than in other leadership roles, and they can be helped first. Maybe there is a city where the company performs significantly worse than the surrounding state or region. Start smaller. Then you will be encouraged to develop from there.

Once you know the projects you're tackling first, you can start to assemble your team.

Step 5

The Team

What kind of team do you need to build for a great HR department? You need to 'grow' a team of people with complementary strengths. Each team member should have individual specialties. They must also have the ability to work with others, fill in for the areas they lack and upskill to contribute to long-term overall team success. By having a cohesive team, you will have a solid talent pool to dive into when planning each project's success.

Some skill sets can be performed by a singular person. For example, some talent acquisition specialists will understand skills assessment best practices, while some total rewards professionals will also be versed in employee engagement. Your team may start small, but over time you will be able to add on through other hires, contractors, and agencies. Because your team might start small, you need to use your HR strategy and goals to identify and prioritize which skills are the most influential now, and which you can focus on in the future.

Where You Want to Go (For the Visual Learners)

Here's a breakdown of the types of skills people on your team will need to succeed:



The Data Heads

- People Analytics Expert
- Organizational Development Professional
- Total Rewards Specialist
- Compliance Expert

The Data Heads

- HR Technology Specialist
- HR Software Developer
- Web/Mobile/Intranet Developer
- Specific System Expert (ATS, LMS, Payroll, etc.)
- Technology Purchaser and Implementer

The Creatives

- L&D Specialist
- Instructional Designer
- Employer Branding Professional
- HR Program Communications Expert

The Strategists

- Chief HR Officer
- Succession and Workforce Planner
- Chief Diversity Officer
- Strategic HR Advisor
- Director of Talent Acquisition
- Director Employee Experience
- Talent Management Strategist

The Crowd Pleasers

- HR Events Planner

You may also need a couple of HR assistants who are responsible for interactions between IC and Marketing. Your employee communications efforts must all be on-brand with both the Employer Brand and overall company brand.

When HR, IC, and Marketing all learn to play nice and see each other as assets and partners instead of silo-defending competitors, they can all achieve even greater success.

How to Start Strong

Write Down Your Goals and Measurables

Here is a small check list of what you should have accomplished thus far:

- Reviewed all the data
- Learned more about the business goals
- Developed or honed a unique Employer Brand
- Decided on a couple of key areas where you think HR can make a measurable impact
- Chosen whom you need to hire

Now, you can turn all of this over to the CEO for approval. Don't be surprised if she's still a little skeptical. After all, she expected "HR admin" and "compliance expert" to be on your hiring list, but "data analyst" and "talent management strategist" were likely unexpected. As you hire your team, you know the C-suite is watching closely to see if the investment is worth it.

To start strong, you have one last behind-the-scenes step.

Write Down Your Goals and Measurables

To start your first weeks off right, you need to take your strategy and pair it down into SMART goals. These will become the means to take the next steps.

SMART goals are:

- **Specific:** The goal is very clearly defined.
- **Measurable:** You can accurately track your progress towards achieving the goal.
- **Attainable:** The goal is not overly ambitious but a feasible stretch to accomplish.
- **Relevant:** The goal relates to the project and the overarching business goals you strive to achieve for the company.
- **Time-Bound:** You have rooted your goal in a timeframe rather than leaving it open-ended.

The overarching goal behind the SMART strategy is to develop measurable outcomes that help the company succeed. If you notice yourself planning around vanity metrics and things that are "pretty" but not necessary, then stop. Go for a walk, take a few deep breaths, and then tackle your list again. Do not be afraid to create goals that have compelling reasons behind their importance.

Three Great Options for Test Projects

Though your specific company's goals may vary, you'll want to start off with three "test projects" to help your team learn to collaborate, while providing the results of measurable outcomes you need in order to prove strategic value to the C-suite.

How to Start Strong

Three Great Options for Test Projects

1

Test Project One: Localized Overall Improvement

This option is great for businesses with varying employee engagement levels between locations. Choose a city that is underperforming. Next, carve out three to six months to roll out general improvements, using your organization's intranet and various HR technologies to encourage teamwork, engagement, development, and communication. Partner with IC where it makes sense, such as the best usage of the corporate intranet.

Work from the top down:

- Create an online space for managers to benefit from training modules and instructional videos addressing current concerns for those locations. For example, if work-life balance is an issue, add training modules to address how managers can improve this.
- Include personal support resources so managers feel professionally and personally supported, and are able to help their direct reports. For example, many employees have experienced increases in anxiety or depression in recent years. Consider implementing specific support in these areas.
- Engage with other locations that don't experience the same issues, and initiate open discussions and best/worst practices. How did they overcome such issues? What was the employee response?

Once your leaders have the tools and training they need:

- Bring the remaining employees together with their leaders, using the same strategy.
- Make sure to account for specific demographics if they are noticeably different from your leaders. For example, if there are substantial age differences, the most effective communication, support and/or training for each group may differ.
- Once everyone is comfortable, create space for leaders and employees to talk amongst themselves. Regular check-ins can allow them to share, learn, troubleshoot, and appreciate one another.



Hint

This same strategy works with an app or with face-to-face meetings if not everyone has access to your digital channels.

How to Start Strong

Three Great Options for Test Projects

2

Test Project Two: Start with Middle or Senior Leaders

Regardless the size or structure of the company, leaders make all the difference. Good leaders and managers keep your teams happy and running smoothly. In fact, many people point to their managers as the most critical deciding factor when considering whether to stay or leave a job.

For this project:

- Identify which leadership tier is experiencing the highest turnover or has the least effective teams, then bring that tier into the intranet first.
- Create training modules around their shared/common pain points and encourage team building and collaboration between managers. Help them learn to see each other as support and resources.
- Host modules or events around specific exercises that will help them work through the biggest issues within their teams. Supplement these exercises with key data points you gathered. For example, is there a common trend across the majority of exit interviews that pinpoint a manager's weakness?

3

Test Project Three: Solve a Company-Wide Micro Problem

This option is great when you feel inspired by leadership's goals and want to contribute to them while showcasing your team's capabilities. First, take a general goal, KPI, or company value. Break it apart until you find a subsection that keeps it from being achieved. Now, work on fixing it!

For example, leaders have set a goal to better support their employees' personal health and well-being in the coming year. They added gym memberships, telecounseling, two mental health days, and a couple of additional health insurance providers to their benefits package. But three months into the year, only 1% of employees have even looked into the new benefits, and fewer than half of those employees have used them.

Based on your team's desires and demographic data, it seems that additional health insurance providers would most interest the majority of employees. The data shows that most of the company's employees have families, and HR has already explained that both new providers have more competitive family rates than the previous options.

Now make it your goal to increase the percentage of employees who have looked into the new health insurance providers.

How to Start Strong

The Results

The Result:

The Metrics Behind the ROI They Want

Everything comes with a price. Anything you ask for needs to yield measurable results and outcomes. These kinds of outcomes must be converted into graphs and numbers to serve as evidence of your company's Return on investment (ROI).

Your evidence will be presented in a boardroom. There, you need to speak the language that convinces stakeholders and executives, and that language is numbers, data, and outcomes. It is critical to provide this type of proof because everyone attending the meeting shares, and expects, the same kind of information. You can't go in there simply with words and pictures, no matter how impressive your tactics and outputs are. You need numbers, data, and outcomes.

To prove the return on investment for HR, you must start projects with measurable outcomes in mind. Let's begin with how to measure the results from our test project examples.

Test Project One:

Localized Overall Improvement

How do you quantify general improvement? In this test project, the goal was to improve a couple of underperforming locations. There are several ways to prove this was successful:

Hard Numbers (to show causation):

- Did employee retention steadily improve over the months of the test?
- Did customer ratings go up over the months of the test?
- Did quality control improve (less products returned, sent back)?
- Did employee performance increase (such as an increase in sales and/or profits)?
- Are employees more likely to complete projects on time?
- Did performance reviews and ratings increase?

Soft Metrics (to show correlation):

- Did employee survey feedback improve?
- Did the employees report improvements to the work environment or overall satisfaction?
- Did managers of the locations report improvements to their team's morale or satisfaction?
- Did any recurring issues get resolved (inconsistent customer service, repeated product issues, etc.)?

How to Start Strong

The Results

Test Project Two: Start with Middle or Senior Leaders: How Did They Respond?

In this project, you worked to strengthen the weakest link in the company's leadership structure.

Here are a few success measurements:

- Did turnover decrease?
- Did the teams performing under those leaders show noticeable improvements (see measurables from Test Project One)?
- What percentage of leaders engaged in development modules? For those who did, what were their results? For those who didn't, what were their results?
- Did their engagement remain consistent throughout the test time?
- How many times did managers initiate or participate in intranet conversations?
- What were the usage rates of any specific support solutions that were offered to employees?

When running tests on a focused group like this, it can be beneficial to survey the team to measure general satisfaction and feelings of support. Ideally, you would survey them before project roll out and after project completion. The former will provide a baseline, and the latter will demonstrate the improvements your efforts generated.

Test Project Three: Solve a Company-Wide Micro Problem: Was There Overall Improvement?

Because this one is company-wide, it is best to pick a problem with easily measured metrics. Using the new benefits example: coordinate efforts to line up with upcoming open enrollment. If a significant portion of the employees choose the new benefits, after previously showing little interest when it first rolled out, you will have precise numbers that speak volumes to the C-Suite.

Additional metrics you can track:

- Did the percentage of employees who engaged with content focused on highlighting the advantages of the new benefits increase?
- Was there an increase in questions or requests for more info regarding the new benefits?

- What percentage of employees activated or used the new benefits?
- Are there different health-related benefits that are consistently mentioned as being desired, such as paternity leave or more flexible hybrid work schedules?

How to Start Strong

Things to Avoid in Order to Succeed

Things to Avoid in Order to Succeed

First impressions matter, so here are a few things to avoid when starting out:

Over-promising, Over-asking, Over-hiring:

Of course you want to put your best foot forward, look like you're the expert, and be confident. However, changing people's minds takes time. Suppose the company expects you to be the strict rule-enforcer. If you surprise them by improving the retention rates at two stores in six months, they will be impressed and want to see more. But, if you came in promising an overall improvement across 50 locations in six months and hired a full suite of employees to achieve this, you're setting yourself up to fail. Whether you receive everything you ask for right away or not, you need to assume you're facing skepticism by positioning your department as a strategic enabler of positive change. It's advisable to start lean in the beginning, and achieve fantastic results. Then ask for a little more, because there's magic in earning it.

Saying "No" to All the "Fun" Projects:

In the beginning, it does not hurt to help other departments where you can. This offering is a great way to open conversations with various people within your new company. When a manager reaches out about an online town hall for their location, say yes. However, use it to get to know more about their pain points so you can pitch ways to solve them. When IC needs that benefits newsletter, use that to learn more about how they're trying to engage employees or the challenges they're facing. Rather than allowing your department to be flooded with these requests, strategically accept them. It will help you get a better pulse on the state of internal affairs in the company. Plus, as the new team member, you have to expect a few of these projects while you work on shifting the perspective on HR's potential.

Saying "Yes" to All the "Fun" Projects:

It's okay if your department helps with the "fun" company requests. But at a certain point, you need to learn when to say no. If your team is too busy balancing superfluous things, it will not have the time to focus on its larger goals. Without those, your department will not be able to help the company as much as it should be able. Being overrun with "fun" projects is a lose-lose situation for everyone involved.

How to Start Strong

Things to Avoid in Order to Succeed

Rushing Into Action, Without Forming Your Strategy:


Without taking the time to form your strategy carefully, you will not be able to follow through on the promises you make. Do not be so anxious to prove yourself, or you may rush the results. You know you have a valuable perspective to offer the company, so take the time to form your strategy in a way that allows your viewpoint to shine. This approach will set you apart as a strategic asset and earn you the respect you want. In addition, not only does a strategy define **what you and your team will be doing**. It also explains to everyone else **what you and your team are not going to be doing**, unless they want to swap out some priorities or give you extra resources to do them. There is nothing wrong with using your strategy as a polite way to make the requesters decide what's more critical to them. Show them the impact you are capable of and let them choose one way or another.

Letting Imposter Syndrome Take Over:

With everything we've said so far, you may feel intimidated. You may be shot down in the beginning and misunderstood for a while. Just remember: any new concept takes time to sink in, especially when you're the one introducing it. Think about the airplane. It was a hard sell in the beginning, and now we can't picture transportation without it. A strategic approach to HR will be the same. Do not give up, and do not doubt the value you bring just because it takes time for everyone to get on board. Focus on your early projects. Apply yourself with care and tact, and think strategically. Construct a great team that shares your understanding of HR's value. Most of all, keep track of your progress. When you turn in that report, showcasing ROI that cannot be ignored, your uphill battle will start to even out. Just don't give up!

Acting Apart from Marketing, IT, IC, & Leaders:

When you first start your new role, you may feel as if leaders from Marketing, IC, and other departments are against you. Try to work yourself in slowly and start small. With calculated and strategic goals, you can be proud and passionate about your desire to help the existing processes. Demonstrate that you want to be a supplement and complement to them - not a replacement. If you can do this, you will earn their participation, collaboration, support, and even respect. When Marketing, IC, and HR all learn to work together as indispensable ingredients of a superior recipe, the results are sure to be delicious.



**You Can Do It:
Make Your New Role a Success!**

Maybe you're still standing at your desk, feeling intimidated by the CEO's request for the list of the things you need to succeed. Hopefully, this outline has helped you feel empowered. Now find a couple of good, bite-sized projects to establish a core team around. Feeling intimidated is normal.

Just keep focused and plugging away, and soon you'll have victory.

Now go get 'em!

About Simpplr

Who We Are

Simpplr is the leading AI-powered employee experience platform. Organizations use our forward-looking, adaptable products to deliver personalized experiences that inspire and engage their employees. Wherever people work, Simpplr enables them to flourish.

Trusted by more than 500+ leading brands, including Zoom, Snowflake, Moderna, Eurostar, and AAA, our customers are achieving measurable productivity gains, increased employee engagement, and accelerated business performance.

Simpplr is headquartered in Silicon Valley, CA with offices in the UK, Canada, and India, and is backed by Norwest Venture Partners, Salesforce Ventures, and Tola Capital. Learn more at simpplr.com

Benefits

- Designed for the way you work
- Ready to use in weeks, not months
- Built for business users
- Unified, engaging experience across mobile and the web
- Powerful integrations
- Secure and scalable platform

Trusted By

