Human Resources: A Practical Guide

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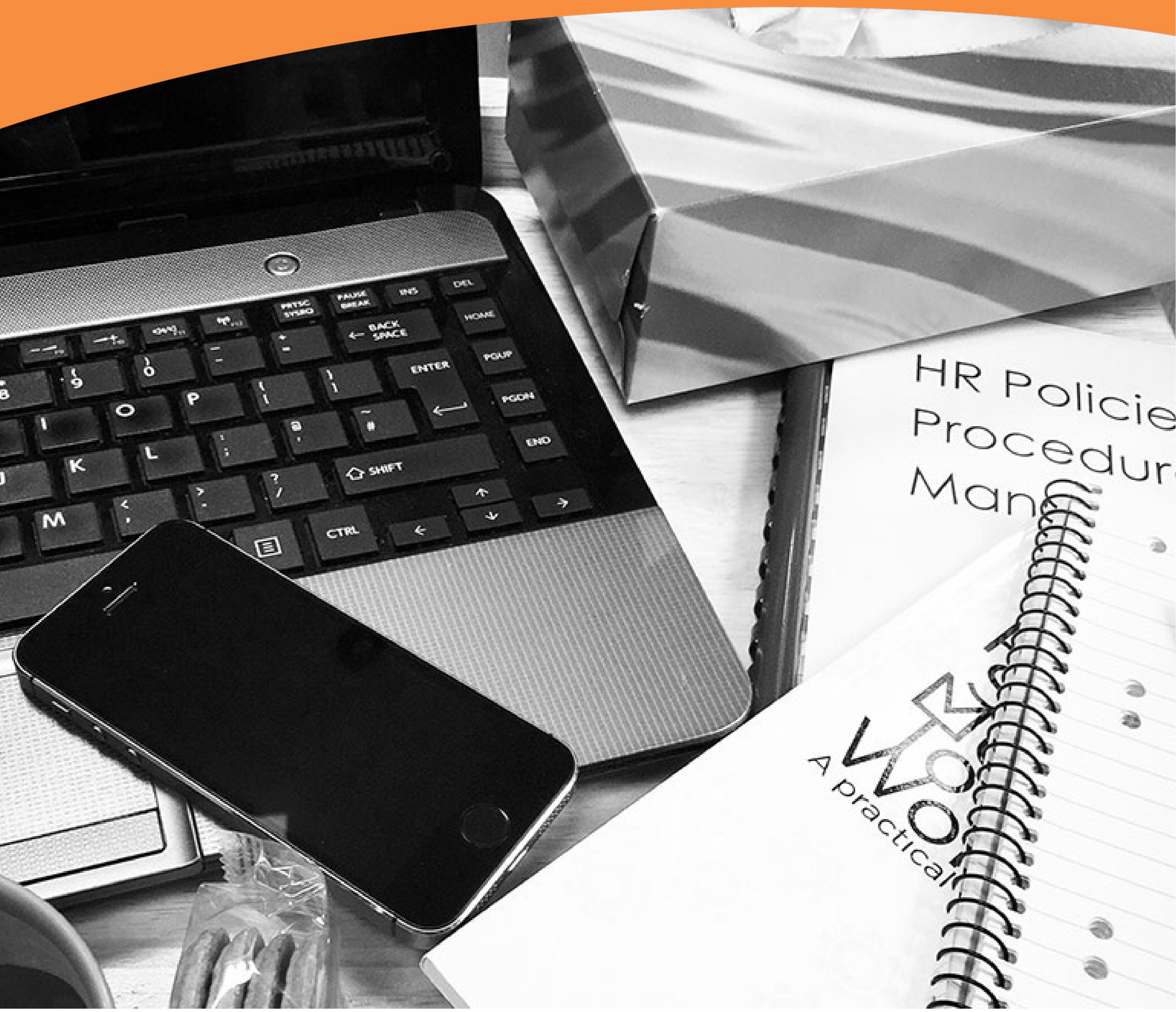

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Introduction

Working in Human Resources can be hugely satisfying but challenging. We know: the two of us have been doing it for years (more than we'd care to admit)! It can occasionally be a thankless task as it involves balancing the needs of both an organisation and the people that work for it in a way that other roles and functions just don't have to.

There is a heck of a lot written about Human Resources. Sometimes, these books are of a strategic nature. Sometimes, they share examples from great and good corporations. However, sometimes, we believe that what HR practitioners need is some good old fashioned practical, pragmatic advice. Case studies and learnings from large corporates can be interesting and thought-provoking, but they can also be far removed from the everyday reality of the HR professional, especially those in smaller organisations or smaller teams, with equally small budgets.

As it's such a broad area, there are many different roles that are covered by the umbrella term of HR. You may be a generalist, expected to have a good knowledge of all of the specialist subjects, especially if you work in a smaller organisation. You may be an expert in a specific area like Reward, Recruitment, Employment Relations, Learning & Development, Information Systems… the possibilities are endless! Whatever your flavour of HR, we believe there are some general principles that apply to doing good 'people stuff' that we'll keep referring to throughout this book.

We have tried to summarise our own experiences and learnings from our HR careers, which we hope will be useful to others. Lots of books about HR and management are weighty, complex tomes. We have aimed to make this one straightforward and accessible (largely because we like things that way ourselves), with practical recommendations derived from our own trial and error along the way.

We hope you find it useful as you think about how to tackle your own HR challenges and careers.

Gemma and Tim

Part One:
General HR Stuff

1 The elephant in the room

Let's face it, as a function HR doesn't always have the best of reputations. We get called 'human remains' and people joke about us being there just to hire and fire. You don't have to work in HR for long to experience a room of colleagues suddenly falling silent as you walk in. Sometimes, we are seen as the policy police or the place to go when something goes wrong. Even worse, we may be seen as a function providing 'tea and tissues'. Have you ever seen a HR person represented in a TV programme? More often than not they are portrayed as some sort of (usually female) cardigan-wearing pen pusher.

This reputation is unfair and for the most part, untrue. But that doesn't mean it doesn't exist. We have both worked in organisations where HR as a function was not particularly valued, nor was its potential to contribute to its success fully utilised.

In HR, we sometimes find ourselves fighting this poor reputation of our function. Maybe the department does fall into one of the categories above. Maybe the person criticising HR has personal experience of a bad HR person themselves. Maybe HR said no to their flexible working request in case it 'set a precedent' or bungled their redundancy situation. Or maybe, there has been a line manager or two saying 'HR said we have to…' to excuse some negative practice.

Of course we all know that HR can be – and is – so much more than the occasional unflattering stereotype. Although it is something of a tired business cliché to say that 'people are your greatest asset', it is true that people amount to a sizeable investment and resource for almost all organisations, and within that fact exists the opportunity for HR and for HR professionals. If you can get all of that people stuff right at your place, of course.

We believe that ultimately, how HR is perceived in your organisation, is up to you. You can choose. If the reputation isn't so great, you can change it – although it will take time. If it is already good, you can make it better. There is probably a default position and viewpoint right now. The first thing you need to do is understand where you are at today, and then decide where you want to be in the future.

Everything else flows from there.

Recommendations for tackling the elephant:

- Talk to the leaders in your business: find out what they want from HR and how HR can help them do their job more effectively. Ask yourself, ask them, how you can support their aims and objectives.
- Ask yourself these questions: what do people say about HR now? And if you don't know – how can you find out? Don't worry about overcomplicating this with endless surveys and focus groups. Sometimes, the best way is just to get out there, speak to people directly and ask. Of course, you have to be prepared to hear the answers, whatever they may be…
- Finally, consider this question. What do **you** want them to say about HR, when you are not in the room?

2 Great Human Resources

What is great HR? What does it look like? How do you know if you have achieved it?

This isn't an easy question to answer. HR is contextual. What an organisation needs from its HR function and HR professionals will differ from place to place. It is influenced by the particular industry, unique business challenges and organisational history and capability – among many others. However, we believe that great HR and great HR practitioners have some common features wherever they are. In no particular order, here are those commonalities.

Great HR…

- involves balancing the complex and sometimes competing needs of organisation, line manager and employee
- is simple and bureaucracy-free wherever possible
- empowers managers to make their own decisions – and doesn't tell people what to do.
- helps to create the conditions in which people can thrive and grow.
- addresses the cause of people issues, it doesn't just treat the symptoms.

Great HR professionals…

- understand the context in which they operate and understand it well – the industry, the market, the value drivers, the products and the services.
- have a deep understanding of human behaviour.
- have a commitment to their own personal development.
- know their stuff, whether that means keeping up with employment law or that latest industry thinking, so that they can speak from a position of authority.
- role model the heck out of all of the stuff that they launch and speak for at their place.
- can clearly articulate how HR adds value.
- are easy to do business with.
- are pragmatic and practical in the advice that they give.
- never lose sight of the way that the people stuff makes people feel.
- challenge appropriately and aren't afraid to stand up for what is right when it is necessary.
- understand the link between the people stuff and everything else that happens, like customer experience.
- take measured risks.
- are trusted advisors.
- have guts.

On the flip side:

Great HR professionals…

- don't see themselves as separate to the business that they work for, or spend time worrying about whose 'side' they are on.
- aren't risk averse.
- don't put barriers up and create rules that constrict the organisation or people within it from taking action.
- don't make decisions for managers, they advise and coach.
- don't quote employment legislation at people.
- don't jump on bandwagons or follow fads.
- don't create processes unless one is really needed.
- don't blame managers for what people stuff doesn't get done; instead they seek to understand why.

3 Putting the people plan together

Whether big or small, ambitious or simple, you need a plan for the people stuff at your place. The plan is how you get focus for yourself and your team. It is how you communicate to the organisation the work that you will be undertaking. It is how you will measure and demonstrate your success.

There are operational plans, and there are strategic plans. There is activity that sits squarely within HR, and people related activity that is more widely owned.

First things first. The people strategy and the business strategy are not different things. It could even be argued that you don't need a separate people strategy: you simply take your overall organisational strategy and align your people activities to it.

Everything starts with your overall aim, and your overall aim should be derived from and support the overall business aims and objectives.

The second most important point is ownership. HR will need to own the plan and drive its completion; but people activities are everyone's responsibility. Whether it is culture, leadership, engagement – these are the things that are the responsibility of every leader and manager, not just the HR team. Labelling is important – you will note that this chapter talks about the people plan, and not the HR plan. There will undoubtedly be some stuff in any people plan that is very HR-specific or very transactional. Maybe it is about updating your policies, reviewing your suppliers or other routine activities. This is a HR operational plan. We suggest your people strategy should be something else.

For all of these reasons, the people plan cannot be written by HR in isolation. HR needs to lead the process, but it needs to involve the views of everyone. Not just to get the all-important buy in, but to make sure that it fits what is required. Otherwise it is nothing more than a list of things that HR think would be good.

Ask yourself this important question to help begin the process. What is our aim for our people? Is it about increasing employee engagement? Is it about being an employer of choice? Is it about gaining an accreditation even, like Investors in People, or being recognised as a great place to work? The answer to these questions should help shape your plan. Once you know where you want to go, make sure you understand where you are today. Then the gap in between becomes your plan.

A good people plan will have some key elements. It will be very clear how it aligns with and supports the wider organisational aims. It will have overall aims and objectives, supported by clear operational supporting activities – a clear 'how' this will be achieved. It will include the resources required to deliver it, and the costs too. It will have desired outcomes and measures for success.

Recommendations for devising a people plan:

- If you don't know where to begin, a straightforward SWOT analysis (listing the Strengths, Weaknesses, Opportunities and Threats) of your current position around people is a good process to get you started.
- Consult and engage widely. Listen lots. Remember that saying about having two ears but only one mouth – HR will have plenty of ideas, but if they are not relevant to your organisation or its challenges then ultimately they will fail.
- Don't follow what other companies are doing. We worry sometimes that everyone is trying to be Google. Only Google can be Google. Do what is right for you. This is something we will be saying loudly and often. But at the same time, keep looking up and looking out. Do take inspiration from others, just don't try and become them.
- Communicate the plan widely – and make sure that you include the why so that people understand the point of what you are working on. A simple, straightforward, and jargon free explanation is what is called for – and try to make it no more than a couple of pages. Don't forget to update people on the progress against it too.
- Get the buy in of your senior team. Consult them, listen to their feedback and then take the plan to them. Get their agreement to proceed and make sure that they know you will look to them to support you visibly where necessary.
- Be realistic. Most people can only work on two or three things at once before they are cognitively overloaded. Depending on the size of your team and resources, four or five priorities or projects are more than enough.
- Having said that, be ambitious too. You don't know what you can achieve until you try. Being provocative is fine too within reason and depending on your culture. If you do what you have always done, as the saying goes, you will get what you have always got.
- Don't overpromise or overcomplicate.

4 Employee Engagement

As an HR topic, employee engagement has been hugely popular in recent years. The UK Government in particular has supported the focus on employee engagement through initiatives like Engage for Success (http://www.engageforsuccess.org). There is a general acceptance that we have an engagement problem – that employees are for the most part, not as engaged as we would want them to be, and that this in turn has a knock-on negative impact on to productivity and business performance.

There are those that argue the case for employee engagement, and equally there are those that are significantly more cynical about it. Whichever position you adopt, there is little hard evidence that increasing employee engagement will in turn improve overall business success or financial performance. That doesn't mean it isn't worth focusing on, but it does mean HR professionals need to be careful how they position it within their organisations.

We take a simplistic view of employee engagement. We believe that it is an outcome of good people practices and the effective leadership of people.

There are some other things that we believe to be true about the subject employee engagement:

- Measuring engagement is not as easy as a number or a percentage, because engagement is about how people feel. And that isn't all that easy to quantify.
- Employee engagement is not about doing an annual survey, and an annual survey is not your employee voice. Employee voice is much, much more than.
- Employee engagement is not a programme, or a work stream, or an activity in its own right. Treating it as such as such suggests it is separate to the day job. For HR and people managers, it *is* the day job. Or at least it certainly should be.
- Employee engagement is not the responsibility of the HR function, but of everyone – leaders in particular.
- Employee engagement does not have an easy return on investment, despite what some people will have you believe.
- Employee engagement doesn't have a neat, universal definition. Engagement is contextual and will look and feel different from place to place.
- Engagement should not be pursued in its own right – and neither should an increase in an arbitrary percentage or score.

Employee engagement is a key part of what all HR professionals do every day; whether that is the language that is used to describe it or not. We set the scene, send the signals, create the culture – and it all starts at the beginning of the employee lifecycle. From the first sight of a job advertisement through to the day that someone gets their P45, every interaction is an opportunity to engage or disengage. Some of these touchpoints are overlooked. Some of them from time to time get a resurgence of attention under a fancy new name ("onboarding" anyone?). These touchpoints and key HR disciplines are how most employees (including line managers) experience HR.

We will come to the specific issue of employee engagement surveys in a later chapter. In the meantime, here are some **recommendations from us on employee engagement:**

- Decide what "employee engagement" means for your own organisation. Although there is plenty of theory about core areas that support employee engagement wherever you work, there are some aspects to it that are organisation-specific and contextual to you. What does good look like based on your own particular context and organisational challenges?
- Consider what disengages your employees, not just what engages them. Little niggles can become big things. Find those things about your organisation that bug people and see if you can take them away.
- Make sure that you understand what drives engagement.
- Read our later chapter on employee engagement surveys before launching one!

5 Employee Experience

Lots of organisations consider the experience of their customers very carefully. They focus on the interactions that they have with them and the journey the customer takes throughout each of those interactions. Many organisations have customer experience programmes or attempt to measure their customer sentiment through surveys, feedback mechanisms or Net Promoter Scores.

Employee experience is a term that isn't used quite so frequently; instead we are much more familiar with looking at employee engagement. Engagement of course, is an outcome of many variables. Experience is somewhat different. It *is* these variables. Happening every day. Every single interaction with 'the company'. Whilst HR is not responsible for all of these variables and interactions, they certainly influence them and help to create the conditions in which they operate.

Customer experience and employee experience are undoubtedly linked. It isn't difficult to reach the conclusion that an employee who is generally happy in their work will provide a better customer service than one who is not. A quick Google search will lead you to plenty of evidence. We think that a focus on customer experience without considering the employee experience misses a vital chunk. But hey, we would say that! Great customer experience begins with employees: we have seen employees referred to as 'the customer within'. So if customer experience is on the priority list for your organisation then employee experience needs to be too.

In some ways, employee experience needs greater focus from HR than employee engagement does, although the latter tends to capture more of the headlines and industry attention. If the experience is effective then engagement should logically follow.

For us effective employee experience, from the HR department at least, means several things. It means bureaucracy-free. It means simple and straightforward, without errors. It means an effective employee life cycle. It means considering how your employees feel.

Employee experience is the employment life cycle; every single interaction, every employee touchpoint with the company. Which is handy, because that is the next chapter.

Here are some things to think about, on the topic of employee experience:

- When was the last time you had truly excellent customer service as a consumer? What was it about the way you were treated that made it excellent – and what role did the member of staff play in that? How did they represent their organisation to you?
- What is the employee experience like at your organisation today? If you don't know, how can you find out?
- What would you like it to be?
- Do your managers and leaders understand the link between employee experience and customer experience? If not, how can you help them make the link?

6 Data – big and small

One of the subjects that has been causing quite a bit of fuss recently, especially in – but not limited to – HR and management circles is the concept of so-called "Big Data".

The idea is that there is such a vast amount of data 'out there' at the moment – so much more than there ever has been before – that if we are able to harness it properly, we can use it to make our planning, decision-making and budgeting far more accurate. When you think about the data available from a single smartphone, for instance – where the user has been, how they went there, who they interacted with etc. – and the potential to analyse that across millions of people, your mind begins to boggle…. Well, ours do anyway.

There have always been some organisations that have measured things in a level of detail that most of us thankfully aren't subject to – like precisely how long is spent in the break room or, worse still, the toilet. Well, the same technology that is in our smart phones can now be implanted into our name badges. Our habits in and around the workplace can be tracked and companies can learn from them. If this all sounds a bit Big Brother, well, we tend to think it is really. Of course, the trend towards this "wearable" technology and big data could have some benefits, especially for location- or safety-critical roles such as in healthcare or the military. However, using technology to monitor who is moving around the office more or less than others seems a bit strong to us – even if an industry is steadily building up around it.

Having said all that, it is vitally important in the modern workplace that HR professionals are comfortable dealing with data and numbers. It is a bit of a cliché (there are a few of those mentioned throughout this book!) that HR people are not the best at this. The old defence goes "Ah but we're *people* people, not *numbers* people – we leave that to [sub text: *the boring people in*] Finance".

That defence simply does not cut it anymore.

You will be expected to provide management information by analysing data from your HR Information System (more on those later). You need to be able to make calculations about payments that should be made to staff in various circumstances. You need to be able to manipulate data from surveys and make comparisons with trends and external data. You need to have at least a basic understanding of how to use a spreadsheet to present information to managers, the senior team and the Board.

There are no longer any excuses: there is plenty of information available online to help you with any particular IT package you struggle with. Numbers and data – big or otherwise – may or may not be your strength – but they are definitely an area that those of us in HR will increasingly be expected to be able to work competently with.

Part Two:
Employee Lifecycle

Introduction

You have now heard our thoughts on what makes great HR, how to determine what sort of HR professional you want to be and what sort of HR you want to deliver to your organisation. We will now turn our attention to the practical stuff. Those activities that typically sit in most HR departments.

These are the areas, routine or not, that have an impact, positive or negative, upon your employees from the moment they first connect with your organisation through to the day that they leave. It is most commonly referred to as the employee lifecycle. We think of it more like a journey. Some employee journeys are long and some are short, but what happens throughout them determine how engaged employees are, the extent to which they want to continue working for you and what they say about your company to other people.

These activities have the power to create a great employee experience, or, if done badly, have the power to disengage, to make someone decide to leave or simply to only give part of their attention and discretionary effort to their job.

One important consideration is this: how effective is each of these lifecycle activities right now? An audit may be required to help you understand that – including the views of those that work within them but outside of the HR function.

In HR, we don't own and can't influence all aspects of the employee experience. It is influenced by the line manager, the team, the culture, even the physical environment in which employees work every day. But there is much that HR can influence, control and lead. So we turn to these areas first of all.

7 Recruitment

Recruitment activity is a big part of the work of many HR departments. Bringing in the right talent at the right time is a key function for any business. Unfortunately, we see lots of examples of companies doing recruitment and selection badly, or at least not going about it in an engaging, optimal way. Although it's another tired cliché to say that there is a 'war for talent', it is true that good candidates with in-demand skills have the ability to be choosy about the roles and organisations that they consider.

Common problems with recruitment process that we see often:

- Having fixed interview dates. Candidates have other jobs, other commitments and responsibilities. This is a sure fire way to limit your talent pool.
- Focusing entirely on CVs and application forms and not the wealth of additional information available to recruiters in this social world.
- Refusing to consider applications after an arbitrary cut-off date. Unless there is a good reason for it, this is another way to limit your talent pool.
- Overly long and complex online application processes – especially when they ask you to repeat information already available on the CV.
- Over-reliance on questions that start with 'give me an example of…' Such questions fail to recognise the important of context. The fact that someone has done it before doesn't mean that they will be able to do it again in a totally different organisation. It is akin to looking into the past, and you are not going that way.

Recruitment is a human to human experience. Your recruitment process is also a reflection of your entire organisation and its culture. How you treat your candidate says a lot about what kind of company you are and what it would be like to work for you. So tread carefully, and make sure your hiring managers do the same.

What candidates want from applying for a job is actually pretty simple. However, ask a few job seekers and you will soon find out many organisations don't do it well at all. We believe that a great candidate experience comes down to two things; honesty and communication.

Whilst to the hiring manager, each candidate is one amongst many, to the candidate this might be the only opportunity that they are applying for. There is nothing worse than waiting for the phone to ring – except maybe a lack of feedback and humanity along the way.

Candidates want acknowledged applications, plenty of information on the process, useful company information and constructive and timely feedback – whether they were successful or not. They want effective, useful communication, not automated responses.

We can't of course talk about recruitment without mentioning recruitment agencies. There is a fundamental problem with the contingency recruitment model. Agencies are incentivised to find you a candidate quicker than another agency, quicker than you, at the highest possible fee rate. Working in most third party recruitment agencies is essentially a sales job. This means that when recruitment is conducted in this way, it isn't always optimal for either client or candidate. With the advent of social recruitment, job boards and the like, there is more scope that ever, and lower barriers to entry, for any HR department to do more recruitment themselves as opposed to outsourcing it to someone else.

Recruitment is also an area that allows HR to build its reputation and add value as a real expert in both sourcing and selection. Hiring managers may only recruit someone for their teams on an occasional basis – so expert advice and support is usually both welcome and necessary.

Recommendations for recruitment. There are rather a lot of them for which we make no apology. This is an area in which HR can do way better:

- Apply for a job with your own company. Go through the process you ask other people to go through, and see how it makes you feel. We guarantee you will find ways you can improve it.
- Be flexible with, and respectful of, your candidates.
- Choose your recruitment agencies wisely, and monitor them – they hold your employer brand in their hands when they recruit on your behalf.
- When using recruitment agencies, consider drafting your own terms of business rather than signing theirs. Most will agree and you can make the terms much more advantageous.
- Look at your recruitment agency spend on an annual basis. Work out how much it would cost you to invest more in your in-house recruitment capabilities. No one will know your business and what you need better than you do.
- Make sure social is part of your candidate attraction strategy if it isn't already. Social media presents your organisation with many ways to attract and engage with potential talent.
- Find out how many candidates start your application process and drop out part way through. Your ATS (Applicant Tracking System) should be able to tell you this. Too many failing to complete the process will tell you that there is something fundamentally wrong with what you are asking people to do.
- Look at strengths-based recruitment every time over competency questions. Strengths will tell you about the person. Competency questions just tell you about the past – and this fails to take into account the critical importance of context in whether someone is successful or not.
- If you have a 'no feedback' policy, stop it immediately. The least you can do if someone puts in the time to come for an interview is provide them with some useful feedback.
- If you don't acknowledge applications, and rely on a statement saying 'if you haven't heard from us within…' then stop that too.
- Make your timescales as short as possible – especially when it comes to decision making.
- Make your process as simple as possible. Always.
- Recruit without compromise, despite whatever other pressures you come under from colleagues. As someone at Apple once said – it is better to have a hole, than an arsehole.

8 Induction

Induction is the process of introducing a new employee to an organisation. Although many people treat it as something that begins the moment that the new employee arrives on their first day, it really begins the moment you make them an offer of employment.

Some organisations use different terminology to describe this time period and process. Some call it 'onboarding'. Others use the term 'orientation'. Whatever you choose to call this introductory period, what it really comes down to is welcoming someone – to their new role, new team and new organisation. An effective induction validates the decision to join the company. It should also give the employee everything that they need to be successful in their new post.

It is a process that is fundamental in terms of whether an employee actively engages with your organisation, and even more crucially, whether or not they decide to stay with you. The importance of these early days and weeks cannot be overstated.

In reality, there are two parts to any induction. There is the formal, company-produced and organised stuff. Then there is the more organic side – what happens outside of the structures. How other people make them feel, what is said about the organisation by other employees. What it *feels* like to join your place.

How long an induction period lasts depends on the job and the organisation. A time period of around ninety days is a good rule of thumb. By the end of those first few months, both employee and employer should have a good understanding of whether it is working out for them both. The employee should be well on the way to understanding their role, the culture, the organisation and the team. The line manager should have set some objectives, provided regular feedback and be ensuring that their new team member is feeling included and valued. So far, so straightforward. Or is it?

When it comes to induction, some organisations get it so wrong. Sitting people in front of boring e-learning. Sending out swathes of over-long policies, including the disciplinary ones which tell how they can be fired before they have even started. Forgetting to tell people when they can take a break or where they can go to the toilet. Setting up meetings with everyone they might ever come into contact with. Failing to provide the broader context of the role or the company. Overlong corporate induction days full of PowerPoint in a room with people you will never see or speak to again. Other employees being critical in front of new team members.

We could go on.

Like most things we have written about in this book, there is nothing too difficult about induction. It just takes some time, planning and a little effort on the part of the manager and the wider team to make someone feel truly welcome, and importantly, to validate the decision to join the organisation.

Whenever someone starts a new job, it's guaranteed that they will be asked 'how is the new job going?' by friends or family many times during their first few weeks. Effective induction is about striving to ensure that the employee only has one answer: 'Great, thanks!'

Recommendations on induction:

- Don't neglect the period between the job offer and start date. This is an opportunity to begin building the relationship between employee and company; to make someone feel truly welcome.
- Review what you send out to people once you have made them a job offer with a critical eye. Ask yourself what signals it sends and how it would make you feel if you were to receive it, knowing little else about the organisation.
- Beware the compulsory learning. You know the stuff. Data Protection overviews. Health and Safety modules. Policy summaries. Make it interesting, and if you can't make it interesting, make it brief.
- Don't forget the simple but important practical stuff. Parking, toilets, canteen, stationery. A phone list, access to the necessary systems and locations, how to book a meeting room. Make it easy for employees to find their way around and fit into their office and its etiquette.
- Involve the CEO. Induction is ensuring that you retain talent. This is part of the job of every CEO.
- Involve the whole team. Make sure that they all know who is joining the team and when.
- Having an informal buddy works. Someone to go to lunch with in the first few days. Someone to ask the way to the toilet for the third time.
- Try and do as much paperwork as possible before day one – you don't want all of that taken up by routine administration.
- Consider the opportunities that social media can provide you in induction – whether that is an internal social network, or simply engaging with starters socially before they arrive on day one.
- Don't consider induction done after the first week. Employees will differ, but many will need plenty of help making the transition to a new workplace.
- Gifts are a nice touch. Mugs, pens, notebooks. Some flowers on the desk, lunch on the first day. Inexpensive, but always welcomed.

9 People Policies

When it comes to Human Resources policies, you will find plenty of advice. Unfortunately, a great deal of it can be very risk averse. There are also plenty of companies who will happily charge you for writing them on your behalf.

When it comes to policies, there are a few things that we think HR could do. The first one is to consider whether you need a policy at all. Often, what is included in our HR policies is no more than common sense. Take dress codes as an example. Most of what they state is obvious. In the majority of office environments at least, you shouldn't really need to tell an adult what to wear.

It is important to remember that when you write a HR policy, you are talking to your employees. It is part of your relationship with them. It is part of the employee experience. You are sending them signals about the company, about HR, and about the culture. Most important of all, you are saying something about how much you trust them – see our earlier point on dress codes. This is especially true of new starters. Consider how your policies read to someone brand new to your organisation; what are they saying?

Although often not the most interesting of HR activities, policies are hugely important, more for these reasons than the usual ones that they exist; they can be more than the sum of their words.

If you do determine that you need a policy, here are our top tips!

Avoid stating the obvious.

We once saw a policy that went to the trouble of defining a meeting. Just in case anyone wasn't entirely sure. If it is obvious, then you really, **really** don't need to state it.

Stop trying to cover every eventuality

You can't. So don't even try. If you set guiding principles and empower your managers to act within them, then this should be sufficient. Consider a social media policy. If you try and mention every type of platform or activity, or try and think of every way that employees can use or misuse them and then add them to your policy, you will never keep up. But herein lies a key problem; some people like being told what to do in every eventuality. It saves them from having to make a decision, or gives them the opportunity to say 'HR said'. So amending your policies to principle-led ones will force these people out of their comfort zones to learn and think for themselves. No bad thing.

Don't let them grow

One of the problems with people policies is that they get bigger without you even noticing. They start off nice and concise, and then a couple of years later you take another look and they have grown without you noticing. Often this occurs when a new situation arises in the workplace, and it is quickly added it in to the document for next time. Overall principles are much better, and less is definitely more.

Don't have too many

How many policies do you really need? We reckon that the average HR Department has upwards of 30. Sometimes we write policies that we just don't need. For example, if when managing disciplinary issues you follow the ACAS code, you could just opt to have a statement to that effect in your contract or handbook that says so. There are some policies that you do absolutely do need. Social media is a good example, for no more reason than you might just lose an Employment Tribunal without one.

Be flexible.

Policies are there to provide a framework and guidance. There is a time for following a policy to the letter and a time to take a flexible approach. Over-reliance on policies rather than applying common sense and considering context will disempower your managers and disengage your employees. 'Because the policy said so' is never a good way to start any conversation with your people. You don't have to treat everyone the same, but you do have to treat them fairly.

Consider your tone.

Plain language is just fine. There really isn't any need for legal language or excessive formality. Write like you speak.

Don't worry about a signature

There is no legal requirement to get everyone to sign a policy as some sort of proof that they have read it. You do however need to make efforts to draw people's attention to your policies and make them easily accessible. It just isn't practical to get people to sign everything, especially as once you revise the policy it will make the original signature worthless. Just like we said earlier, getting people to sign policies also sends a signal – a signal that perhaps you don't trust people. This is HR work of little or no value.

One of the most important things of all; never lose sight of how a policy or process makes people feel.

Recommendations for policies:

- Review your current policies with a critical eye. Get rid of ones you don't need. Aim to simplify them wherever possible, including the language within them.
- If you currently spend lots of time printing them, sending them to new starters, or chasing signatures, then simply stop doing this. Just direct people to where they can find the information they need when they need it; that will be more than sufficient.
- Write your own. Don't borrow them from someone else or crib ones from the internet. Your policies need to be about you and reflect your specific needs.

10 Employee Engagement. To survey or not to survey?

We are returning to the topic of employee engagement again. One of those lifecycle activities that takes place in many an organisation is an annual employee engagement survey. It has in recent years become accepted practice to attempt to measure employee engagement through this method, and put a measure (usually a percentage) on how engaged employees are. There are fundamental problems with this approach.

The first problem is that not everyone will complete any survey you issue, so you therefore are only hearing a proportion of your employee voice at any one given time. Often, those who are most disengaged simply will not complete it at all. So unless you are able to generate very high return rates, there is a reasonable chance that you are missing out on useful opinions and feedback.

Problem number two is the questions themselves. Most surveys take a similar approach. Often employees are asked to score their views and feelings by way of a number between one and ten, and they only have the ability to provide open comment to a very small number of questions, if at all. This also seriously limits the value of the information you receive.

Problem number three is actually doing something with the output. Too often surveys are done and noted, but determined action does not result.

Employee surveys can be useful, but they need to be just one way of getting feedback and listening to your employee voice. Other tools should be used alongside it.

Employee Survey Recommendations:

- Do survey your people. But it is better to do this on a regular and ongoing basis, and keep it nice and simple. Avoid very lengthy questionnaires, and do it more than once a year.
- Make sure you share the outputs and what you are going to do about the feedback – even if you aren't going to do anything at all. Otherwise no one will bother to complete it the next time around. "You said…: we did…" is a great formula for this feedback.
- Avoid making a business case for increasing employee engagement by suggesting that it will improve business performance. It might. But if someone asks you for evidence you are going to struggle to find any above a case study level. This won't help your cause.
- Don't forget to think about what disengages your people. Most organisations have lots of little things that bug people, like petty rules and unnecessary bureaucracy. Remove some of these and you will make your place a better place to work. Lots of people forget this.
- Don't forget to consider other ways of finding out how engaged your people are. Look at Glassdoor (https://www.glassdoor.co.uk), for example, or just get out and talk to them face to face.
- If you don't already know, check out what people are saying about your organisation on social media. Because they will be talking!

11 Performance Reviews

Ahh, that old topic again. Performance management is one of those lifecycle activities that lots of people know doesn't really work, but we keep on doing all the same because we haven't come up with anything better. There are several reasons why traditional approaches towards performance management don't deliver the value that they should.

The commonly held view in many organisations seems to be that "performance management" is something that you do at particular times – maybe once a year when it's the dreaded appraisal meeting or when a member of staff is seen as underperforming and their manager has that "we need to performance manage x" conversation with HR. You know the one. Where "performance management" is a euphemism for "get rid of"….

One of the main reasons that traditional performance reviews don't work is that a lot of people are very bad at them. Giving feedback, especially when it is not positive feedback, is very difficult, and many managers will simply avoid it if they can.

Another reason for the failure of performance reviews is sometimes the process itself. It has been made too complex, too difficult to comply with, or too bureaucratic. Occasionally it is a training issue for managers in terms of how to actually do them at all. Sometimes, people just don't see the need.

Here is what we think. Performance management should not be once a year. Neither is it something that should only be done to someone when they are underperforming. But when done badly, performance reviews are more disengaging than engaging.

Lots of HR departments don't like performance reviews either. They make us become something that we don't really want to be: all about compliance. We monitor how many have been completed, the scores that have been attributed. This doesn't help us with the reputation issue we talked about earlier. A completed form also tells you precisely nothing about the quality of the conversation, only the quantity completed. Anyone can do a review. Doing an excellent one is a different ball game entirely.

Recommendations for performance management:

- Consider whether you really need a 'score'. If the score doesn't link to anything or drive anything, then stop having one. They alienate people and make the score the focus of the conversation, not the performance.
- If you do stack ranking/curve ratings, then consider stopping these immediately. They are disastrous for your culture and employee engagement.
- Review your process, and simplify it wherever possible. The more straightforward the process or the form to be completed, the more the focus will shift to where it should be: the conversation.
- Make sure that your managers have the skills they need to give good feedback and to coach rather than tell.
- If you have a problem with managers completing reviews at all, resist the urge to tinker with the process until you find out the reason why.
- Discourage use of the 'feedback sandwich'. This is where you give good feedback, followed by something you want the person to do differently, followed by good feedback. Although it slipped some years ago into accepted practice, it doesn't work and is confusing for the recipient.

12 Family Stuff

Maternity, paternity, adoption, caring. Each of these has a framework of legal rights. Recent years, in the UK at least, have seen these rights increasing. We expect that this is only going to continue in the future.

First things first. You don't really need a policy to cover any of these areas unless you are going above and beyond the statutory minimum. Instead, you can just refer people to the relevant Government guidance.

Nearly as importantly as the first thing, here is the second thing. Flexible working is not just for the people who fit into these categories.

What people want out of work is changing. The 9–5 was invented around the time of the industrial revolution, when work came out of homes and into the factories. It is merely a tradition of work, and one that we can choose to break if we want to do so.

For some people, flexible working is about their family responsibilities. For others it is about other things entirely. One of us has a flexible working day to accommodate a love for Zumba (you can decide which of us). It isn't unusual for managers to be reluctant about accommodating flexible working. Our view is quite simple. If you want to attract and retain the best people (and why wouldn't you?), flexibility needs to be a fundamental part of your benefits offering, and for many employees it will more attractive than some of the monetary ones that they receive as standard.

Objections to flexible working tend in our experience to fall into several categories. We have heard them all.

- If I say yes to one person, I'll have to say yes to everyone.
- It's not the sort of job where people can work flexibly.
- It's not the sort of company/industry where people can work flexibly.
- It's not fair on the rest of the team if one person has flexible working.
- It's too difficult operationally.
- We can't offer it to every department so we shouldn't do it for anyone else.
- I won't be able to manage the person effectively.
- It will impact upon the customer.

When it comes to flexible working, in many respects, it is easier to say no than it is to say yes. It is also easy to focus on the potential problems as opposed to the potential benefits. It is true that there are some roles that don't accommodate flexibility all that well, such as those where a physical presence at given times is required. But equally, there are many roles in which it can work extremely well assuming there is genuine intent on both sides to do so.

Recommendations for dealing with flexible working:

- Try it before you deny it.
- Educate your line managers that flexible working is OK. That you won't have to say yes to everyone. That you won't upset everyone else as long as you communicate well.
- Use trials. The answer to whether or not a particular pattern can work for both parties, is to try it. That way you will either have proof that it doesn't work – or (more likely) it will all turn out fine and everyone will wonder what the fuss was about.
- Linked to that point – don't underestimate people's ability to make stuff work if they want to!

Now back to the family stuff.

Being a parent is hard. Becoming a parent for the first time brings extra complications. New parents inevitably experience a shift in their priorities. The "carefree" days of excessive working hours and going to the pub after work are generally over (for a while at least). There may be the odd occasion where the baby is ill or childcare arrangements break down and leave is needed at short notice. But guess what? That does not make a new parent any less committed to doing a good job or to pursuing their career goals and we'd expect people to understand that. This is 2015 not 1915. However, a look through media headlines will tell you that some employers and managers have failed to notice. There are plenty of horror stories around from women who have been put in very difficult positions during pregnancy and maternity leave.

It is estimated that thousands of woman every year feel forced to leave their jobs, and many more even find themselves made redundant on their return. At the same time, this isn't just a female issue. Many men want to spend more time with their children too, and the new statutory regime in the UK allows for that. However, many men still don't take even the basic two weeks paternity leave available to them – some say that this is down the fact that it is only paid at the statutory rate.

You know what pregnant staff members and returning mothers need? A little bit of support. You don't have to do much that's out of the ordinary: we're all busy and we're all trying to manage businesses and personal lives and goodness knows what else. In fact, all your staff will need support in some aspect of your life.

All you really need to do is treat people decently through whatever is going on for them. You may or may not be able to offer extra pay or leave. Do what you can within your budget. But always do the basics. Don't make things hard for people when it comes to appointments, keeping in touch days, leave notifications. This stuff you can control. And really important – don't forget about people when they are on leave!

Recommendations for family leave:

- Make sure that you agree a way to keep in touch.
- If people want to do keeping in touch (or "KIT") days, encourage them wherever possible.
- Respond promptly (and positively wherever possible!) to flexible working requests.

13 Caring and Carers

This is something that isn't talked about as much as it should be in HR circles so we have devoted a whole chapter to it. We think it is something that HR professionals should be taking urgent notice of.

The number of people who are providing care for someone else is rising. Here in the UK, at some point in our lives, three in five of us will be a carer. We have an ageing population. More than 15 million people in the UK have a long-term health condition. Conditions such as diabetes, dementia, chronic heart failure, and chronic obstructive pulmonary disease are rising, fast. Within just five years we will reach a critical point: there will be more people needing care than people available to meet the demand.

Caring for someone else is a constant balancing act, especially for those who are also in work. Carers often find that there is an impact on their own career as a result of proving care. They are also more at risk from developing mental health conditions; many carers suffer stress as a result of their caring role.

Employers need to take action to prepare their organisations to meet this challenge, and HR has a key role to play in educating employees and managers.

Whether or not they have identified themselves to their employer as such (and often people don't classify themselves as a carer), in every organisation there will be employees who have some sort of caring responsibility outside of their day job – and there is no question that these numbers will increase in the years to come. Many carers are 'hidden', as they often feel unable to confide in their manager or colleagues.

When it comes to supporting carers at work, one of the biggest factors that allows them to juggle work and care is flexibility. This doesn't necessarily mean *formal* flexible working arrangements. Many health conditions are unpredictable and can change quickly. Carers may have to attend hospital appointments, take phone calls during the working day, take leave at short notice. It's not about someone going part-time or changing hours on a permanent basis it may be that some informal everyday flexibility will suffice, as the caring demands flex too.

The other crucial factor is support. A supportive employer, and a supportive line manager in particular, can make all the difference, and small changes are often all that are required.

Recommendations for supporting carers:

- Educate your line managers on why supporting carers is so important, and what they can do to help.
- There is no one size fits all solution that meets the needs of all carers. So let them know that they can talk to you about what they need.
- Provide information about flexible working and sources of help. Check out 'Employers for Carers' (https://www.employersforcarers.org) for more information.

14 Absence Management

We both have to confess upfront here that neither of us finds this the most interesting topic in HR. But it is one that occupies the time of many a HR professional all the same.

Most companies separate absence into short term and long term. Then there is the category of acceptable and understandable absence (think operations and long term health conditions) and not so acceptable and understandable absence. The unplanned, disruptive, or dare we say it, not-particularly-justified absence.

Absence costs organisations. It costs in terms of sick pay, it costs in terms of work that doesn't get done and it costs in terms of overtime to cover those who aren't around. No wonder then it gets much attention from HR and line managers alike.

Like we have said often already, there is no set standard as to what is a 'good' or even desirable absence rate. Different industries with different types of jobs will vary hugely. UK averages tend to run at around six or seven days per employee per year, but this average both includes and somewhat hides vast differences from place to place.

When it comes to causes of absence, whilst organisations will vary, there are similarities and generalities too. You can be fairly sure that somewhere in the top reasons for absence everywhere will be stress, musculoskeletal and the traditional coughs, colds and stomach bugs. Public sector absence is a bit higher normally than private sector, certainly in the UK. The other similarity is that most organisations would like to see their own particular absence rate reduce.

When it comes to managing absence, there is little new to say about how to do it. Conducting effective return to work interviews is still one of the most effective ways of managing short term absence. Taking specialist occupational health advice is also key, as is supporting phased options to help people return to work wherever possible. Skilling your line managers in having the right sort of absence conversations is also right up there in terms of how to reduce problematic absence.

What has changed in more recent years is that organisations are increasingly taking a proactive approach to health and wellbeing, and working on preventing ill-health occurring. More coming up on that in our later chapter on Wellbeing.

Of course absence isn't the only problem associated with ill health. There is presenteeism too: people coming to work when they are unwell, which can be detrimental to them and their job. Presenteeism is sometimes caused by fear; fear of what a manager will do, or fear of losing a job when the economy or business is in difficult times. It isn't unusual to see absence go down during periods of redundancy or economic downturns, as people don't want absence to count against them.

Recommendations for dealing with absence:

- Understand your own absence drivers at a deep level. Overall percentages or total working days lost is just the start. You need to deeply understand what drives absence, what impacts on it, where and when it occurs. Only then can you design the best solution.
- You will need some sort of standards for unacceptable absence. They can be whatever you need them to be for your organisation, as long as they are effectively communicated. However, whatever you use, they are only part of the story – apply common sense and look at the whole picture.
- Treat each case on its own merits, especially where disability is concerned.
- Link your reactive absence management with something proactive – even if it isn't on a big or expensive scale. Prevention is better than cure!
- Train your managers on how to manage absence effectively. As the primary point of contact with the employee, they are going to be the ones who will make the difference.
- Give as much support as you can to employees with serious long term health conditions. It should go without saying, but our experience sadly it doesn't. There are few things worse in life than being diagnosed with a condition like cancer for example. Work has the power to make this easier or more difficult. Don't be the one to make it difficult – and make sure your managers know this too. The best question to any manager who isn't doing what you would hope them to do is simply this: if it was you, or a member of your family, how would you want to be treated?
- Don't make any assumptions about anyone with a long term health condition or undergoing treatment. For every employee who wants to stay at home and have nothing to do with work, there is another who will want to work all the way through it. Just ask.
- If you have an absence problem at your place, resist the urge to fiddle with the policy. Your policy only provides the structures which deal with absence – the chances are this will have the least impact as changing the policy will address the symptom but not the underlying cause of the problem. Do the other stuff mentioned here instead first.

15 Reward

Or "Comp and Bens" as we used to call it. From pay to pensions, flexible benefits to sales incentive plans and everything in between. Reward is a big part of the employee contract, both written and psychological. It is what you receive, for the work done.

What is reward for? The traditional view is that it is all about attracting, retaining and motivating employees. But of course there is more to each of those areas than just remuneration. Recognition is a big part of it too, and the two terms are often used in one sentence. But more on that later. Of course there is also plenty more to attraction, retention and engagement than reward too, even its widest sense. To some, learning and development or progression opportunities are more important than reward. To others, it might be about the purpose of the organisation, or the impact that they can make with their role. With others it might be about practical stuff like hours of work or location. So reward is just a part of what makes someone want to work somewhere and stay somewhere, as well as leave.

As a subject, reward is a huge area. Larger organisations might be lucky enough to have a specialist in the field. There are financial and non-financial types of reward. There are some elements of reward that are regulated or even required by legislation, such as pensions, equal pay and annual leave (in the UK at least). Other HR topics around reward include job evaluation, executive remuneration, incentives, pay progression, pay bands, flexible benefits, voluntary benefits, medical benefits…. Like with many aspects of HR, acronyms and jargon abound: PMI, PHI, RPI, Rem Co…. We could go on, but we won't.

It is clear that there are a whole host of areas to consider for any HR professional when it comes to reward. Some of them are so large in their own right they are way beyond the scope of this little book. Here are just a few reward-based ideas and suggestions from us that you might want to try out at your place.

Recommendations about reward:

- Read "Drive" by Dan Pink if you want your assumptions about reward to be challenged and the evidence to challenge others about it too.
- Learn a little something about the neuroscience of reward. Every HR professional should, and it will allow you to have impactful and useful conversations with your management teams, as well as challenge some accepted wisdom.
- Always carefully consider the potential consequences of any reward that you offer – intended or otherwise.
- Offer flexibility and choice around reward wherever you can. What people want and need from their benefits package differs. One size most definitely does not fit all.
- Make choices as wide as you can. If you offer a company car scheme and there are three cars to choose from, make it six, or eight or 100. It doesn't cost you any more as long as you manage it effectively.
- Most people are happy to fund benefits themselves. Bike schemes, cash plans, extra holiday… these are just a few of the benefits that can cost you little to administer and nothing to offer as the employee funds it themselves. And you get the National Insurance savings too. Bonus all round.
- If you do manage to drive National Insurance savings through using a salary sacrifice programme, make sure you capture those savings and use them to invest in more benefits for your people.
- Ask people what they want.

- Monitor your take up of any flexible benefits that you offer, and keep them under review.
- Think very, very carefully before linking performance and pay. In fact, don't. It drives unintended consequences and rarely gives you what you think it might.
- Do an equal pay audit. Just a simple one. You might be surprised. Or horrified.
- Determine a criteria for pay reviews outside of your annual review process. Circumstances in which you will consider a base salary change. It might be additional duties, it might be a new qualification, but define it all the same.
- When it comes to your annual pay review, decide what it is fundamentally for. Is it about, for example, recognising a rising cost of living? Are you trying to reward something by it, or drive something or change something? We are not advocates for performance related pay as we have already said, but understanding **why** you reward will help you decide **how**.

16 Recognition

Our last chapter was about reward. Often the terms 'reward and recognition' are said in the same sentence. Some organisations link them closer than others. For now, we are talking about recognition in the sense of acknowledging contribution, service, or simply a job well done.

Recognition takes many forms, from the simple thank you, to the traditional long service award, and on to the employee of the month. It can be both organised or organic.

What we know about recognition and appreciation is this. It is powerful.

Just like reward, recognition is personal. What works for one person isn't necessarily going to work for another. For every employee who would love to be nominated employee of the month and have their picture on the wall, another would find the whole process an utter embarrassment.

Recognition is most effective when it is part of a culture and not an organised and structured activity. Some of the power of recognition is when it is in the moment: not waiting for a ceremony or to be remembered the next time that there is reminder about a recognition event. Timely recognition is the most authentic type.

Finally, we know that recognition isn't, for most people, about money. That is why we kept this chapter separate from the one on reward. Whilst some recognition schemes might have a monetary value attached, such as providing vouchers, the power within it is from the recognition itself. Whatever comes with it, be it a trophy or a sum of money, usually comes second.

Employee recognition is capable of making people feel appreciated, engaged and happy at work. It can support and drive desired behaviours and attitude or culture, or support desired outcomes like team work or increased morale. However, done badly, it has the power to seriously disengage employees. Poor recognition schemes can lead to people feeling like there isn't fairness within a team. It can lead to allegations of favouritism. It can lead some to feel unrecognised or under-valued.

When it comes to the specific types, as we said there are many. Most organisations have some sort of recognition, and the long service award is probably one of them. Some people are none too keen on long service awards. They see them more about rewarding presence over contribution. Of course this can be true, in some cases. But like everything we advocate in this little book; it is all about what fits at your organisation and for your culture.

When it comes to recognition, the role of HR is twofold. When it comes to the formal scheme types of recognition, it is about making sure that they are fit for purpose and drive good consequences, not unwelcome ones. The second element is to create the culture in which recognition and, in particular, appreciation happen as a natural, regular and natural thing. The latter is most definitely more difficult than the former.

Recommendations on recognition:

- You don't have to spend lots of money. There is a ton of stuff you can do for less than a fiver. It is the little touches that people remember and appreciate.
- Make it personal. Give people choice on how they are recognised where you can. If you are sending a card, make sure it is handwritten.
- Do a recognition audit. What do you do now and what do people think of it? Do they value it?
- Consider social recognition. There are plenty of software options available, and they aren't that expensive. This isn't about prizes or tokens, it is about appreciating people in pubic for all to see, usually on some sort of internal system.
- Don't make silly mistakes, like giving alcohol without an alternative to employees who might not drink for personal or religious reasons. Consider carefully what you offer.
- Make recognition a surprise or a nice to have. Not something that can or should be expected or taken for granted.
- Be innovative. Employee of the Month schemes are fine but done to death. Keep changing and making your recognition feel new and different.
- Make it inclusive. Everyone should have an equal opportunity to be recognised in your formal elements.

Things that you might not want to do:

- Have votes to determine who gets recognised. Those with the biggest team or most friends at work will inevitably win.
- At the same time, don't make it all about the management team choosing either. This can lead to feelings of favouritism, or ignore the quietly successful.
- Don't throw the long service award away because it isn't trendy. It is often hugely valued within those organisations where long service is a tradition – and others beside.
- Don't make the prize too big. You don't want people to do good work because they might win some fancy prize. Even worse if only one person can win it. You can make it meaningful, without making it all about the money.

17 Learning and Development

Depending on your point of view, Learning and Development (L&D) is either the biggest sub-section of HR or – many would argue – a discipline in its own right. We'd probably agree with the latter to be honest, but the fact that L&D activities sit as part of the HR function in many organisations means we've included a chapter on it here. Particularly in smaller organisations, the HR team is often expected to administer learning opportunities at the very least and in some they are expected to get their hands dirty and deliver some aspects of the organisation's training.

L&D touches on many other aspects of HR practice, particularly talent management, performance management and leadership development. Depending on the activity it can be viewed by employees as both a benefit and a punishment. Whichever way it is perceived, equipping your staff with new skills and developing their existing ones are absolutely crucial in the ever-changing world of work. Despite this, in times of financial difficulty the L&D/training budget is often the first to be cut as it is seen as a "nice to have", rather than a "must do". Some managers worry that if they spend money training and developing their staff then they will leave. As we have mentioned elsewhere in this book, there is only one greater risk than training your people and them leaving and that is you not training them and them staying!

Assuming you aren't an L&D specialist, in an HR team your involvement is most likely to be the planning and delivery of learning interventions. As "Death by PowerPoint" becomes a recognised phrase in corporate life, the focus seems to be moving (slowly) away from face-to-face, off-site, company training days. L&D activities can range across anything from an hour or so spent completing an online e-learning module to a university post-graduate course.

Many organisations start with an L&D budget (sometimes based on a percentage of the salary bill for example) and work backwards to what they can afford, so that tends to be a defining factor. Others put on a catalogue of learning opportunities and it is down to managers and staff to identify which are of interest/use. Some would say that more enlightened organisations are starting to see L&D as more of a strategic partner who can advise and support the organisation to develop and grow. Whichever way your organisation operates, you are going to need some sort of practical plan for your L&D activities across the year.

If you are given the task of putting an L&D plan together, you are going to need to follow some broadly similar steps to other plans we mentioned throughout this book.

Recommendations for putting together an L&D plan:

- Firstly, you need to understand what the organisation's priorities are – so start with your business and people plans and work out (preferably with input from others) what the priority areas for L&D are going to be. As an example, if your organisation plans to increase its sales targets by 100% next year, you may decide you need to focus on developing your sales function!
- Depending on the type of organisation and industry sector, you may have some required training. Neither of us are big fans of the idea of 'mandatory training' (also referred to as 'sheep-dip') but in some sectors – such as healthcare – it is unavoidable that certain skills need to be demonstrated and certified on a regular basis. Many organisations adopt the same approach to areas like Health and Safety.
- You might also want to factor in specific, individual training needs. You could gather this information through a formal Training Needs Analysis (TNA) or you may already have it through your performance management systems.
- Once you have identified the "what", it's time to think about how you will meet those needs you have identified. We'd suggest thinking as innovatively as possible and not getting stuck in the "I must send Joe Bloggs on a training course to learn x" approach. If you have people in-house with the skills you need, can you involve them in your L&D activities? Can you put together a programme that involves social learning from others? Is there existing learning you can tap into, for instance on YouTube? If there isn't, can you create some yourselves?!

- E-learning can often be seen as a "magic bullet" – but we'd issue a health warning. It can be great if the content is good and the idea of being able to do it whenever and wherever is certainly very attractive but if the content is dull or you suffer from IT problems, it will switch people off faster than you can say "click next"…
- Don't forget individual development approaches like mentoring and coaching. Entire books have been written about each of these so we won't go into more detail here – although we will mention it again when we come to talk about leadership development.
- Somewhat unfairly, you may be expected to have all of the answers: don't be afraid to ask managers whether they have had any positive L&D experiences that might be relevant – especially if they are subject experts! People will happily share tales of what has worked for them and what hasn't.
- No discussion of L&D would be complete without mentioning evaluation. We're not talking about the ubiquitous "happy sheet" that you get after a training course here though: your L&D plan will need reviewing regularly to see if it's achieving what you set out to do. Use practical measures wherever you can, even if your L&D intervention may not be the only factor – did your sales increase 100%? If it hasn't worked, you can tweak the priorities and the delivery methods and try again.

18 Wellbeing

There are two aspects to employee wellbeing: the reactive and the proactive.

Reactive is about dealing with absence or currently presenting issues. We've already talked about much of this area.

The proactive side of wellbeing is about promoting health and wellbeing at work, both as a way to reduce sickness absence, but also looking at the holistic health of your employees. Wellbeing is one of those areas that has gained in prominence in the last few years. Like most things HR, there are the fully signed up, Executive team bought-in, strategic priority-type wellbeing programmes. Then there are the much more basic, free fruit in the canteen-type of wellbeing activities. Don't get us wrong, there is nothing wrong with free fruit, if that is all your budget stretches too.

First things first. If you want to launch some wellbeing activities, you will have cynics to deal with. Who don't see the relevance, and think that this is some fluffy HR stuff and don't get the business or strategic angle. It might seem logical to a HR professional that if employees are healthy and well, then they will also be more engaged and productive, but you might need more than that to get a programme up and running. When it comes to the business case, your best bet for calculating some elusive return on investment is your absence data. Whilst the impact upon how an employee feels about health and wellbeing initiatives is a little harder to calculate, most organisations will have hard data on absence in all its many forms.

Before you do anything around planning for wellbeing initiatives, you first need to understand where you are now, and where you are going. What are the desired outcomes from any organisational focus on wellbeing?

So once you have done the how, you will need to come to the what. Frankly, there is absolutely loads you can do within a wellbeing programme. Health seminars, stop smoking help, health screening, Employee Assistance Programmes, health cash plans, health advice and promotion…. Typical topics include resilience, managing stress and change, nutrition, weight loss, exercise, energy, or even topics like debt and financial wellbeing. Some organisations run challenges on everything from steps per day to hydration. Then there is the option of aligning your activities to national campaigns on everything from heart disease to diabetes.

The list goes on. What you choose to do will come down to your budget and your own particular needs. What we will say, is that HR should be doing it. We live in a society where people are living longer, but they are also living with a whole range of serious health conditions. Dementia, obesity, heart disease, diabetes. These medical and lifestyle conditions are increasing, and they will be impacting your organisation both in terms of the obvious sickness absence, but the less obvious area of productivity and efficiency. So make it part of your people strategy, somewhere.

Recommendations on wellbeing:

- Link it to your current challenges. What does your absence data tell you is driving your absence or health issues, and make sure that your wellbeing activities will support these challenges.
- Look at your current costs of absence as a starter for your business case. What is it costing you per employee, per department? What does it cost you not only in sick pay but in all the other costs too like paying overtime for cover?
- Decide on your definition of wellbeing; how wide are you going to take it? Is this about being reactive to current problems, or do you want to move into preventative health? Are you going to include mental health, financial health, education on health? Let your business aims help you set your framework.
- Look at the art of the wellbeing possible through your flexible benefits programme if you have one.
- Don't overlook the benefits of an Employee Assistance Programme (EAP). Whilst take up is often low, for those employees that use it, it can be a lifeline. If you shop around, they don't have to be overly expensive. The counselling aspect alone will often provide help to your employees much more quickly than they can access it anywhere else.
- Measure your results. Take up is a good one to start with, albeit a little blunt, as it doesn't actually tell you if those attending actually make any changes. But monitor your absence trends prior and post, as well as taking actual feedback from those who attended.
- Test stuff, especially wellbeing is entirely new to your organisation. Offer a range of activities and identify what people are interested in.
- Recognise that some people won't want to get into this conversation at work and therefore won't want to participate. That is just fine.
- If you are using third parties, perhaps for health screening or the like, make sure that employees are aware that this data is between them and the health professional. Because the cynics will otherwise think that it is all being reported back to HR.

19 The difficult stuff

As we said at the very beginning, working in HR can be rewarding and varied. But at the same time, it requires involvement in some of the worst things that can happen to a person at work: dismissal, redundancy, discrimination, harassment, grievances – the list goes on. Often, this includes people leaving the business under difficult or emotional circumstances. It doesn't matter what the reason is for the employment relationship coming to an end, there are almost always mixed feelings involved on both sides. Redundancy in particular impacts on the manager and the wider team too, not just the individual at risk, often referred to as 'survivor's syndrome'.

When it comes to these activities, the first and most important thing for us is this: getting the HR role clearly defined at the outset.

Too often, we have seen HR either making the decision (sometimes because the manager doesn't want to) or even worse, taking the blame. HR don't make redundancies or dismiss people, organisations do. It is the role of HR to coach, advice and guide. Make sure that whatever it is, it is done properly – legally, professionally and emotionally.

As we said earlier in the book, HR often has a balancing act to perform. In this case, we have obligations to the employee, our organisation, and the line manager.

Although we may frequently come across such situations in our careers, don't forget that for the manager, being presented with a potential gross misconduct offence, redundancy situation or serious performance issue is probably (hopefully!) a fairly rare occurrence. They may be nervous. They may not have a clue what to do. They may not understand the legal position or implications. There are plenty of things that HR get involved in that are really nothing to do with us. But helping a manager through these challenges as supportively as we can is absolutely something that we need to do.

Three of the most challenging areas to deal with for any HR professional are discipline, grievance and redundancy. Our thoughts on these are coming up.

20 Redundancy

In our experience, some of the most challenging situations for HR professionals to deal with relate to redundancy. Let's face it, even the word "redundancy" is pretty unpleasant – suggesting superfluousness, that the individual has become surplus to requirements or in some way outlived their usefulness. There has been a "reduction in the need for work of a particular kind" according to the wording of the UK statute; in real terms your job is no more. It is an ex-job. Although we are always at pains to say redundancy isn't personal, it's often the case that people can't help but to take it that way.

We are firm believers that whatever the circumstances, it is possible for employees to leave an organisation with dignity.

How it ends is down to both parties. Whilst there is nothing pleasant about the process, HR and the individual's line manager can work together to make it as painless as possible – for everyone.

First of all, never ever forget that you're dealing with a human being. You can be forgiven for sometimes needing to be reminded, especially if you are dealing with names on a spreadsheet rather than people sitting in front of you. But they will have fears and concerns as we all do when confronted by enforced change. They will have specific and unique challenges to face. Often, you can help with them – if they want to accept your help.

Here are our recommendations for handling redundancy:

- Set out the context as clearly as you can so people understand why something is happening – and why it is happening to them.
- Be clear in all of your communications and give straight answers to straight questions.
- Offer outplacement services wherever possible – help people make the transition to leaving and looking for other work.
- Consider what the impact of the information you are communicating might be – it's an emotional time and you need to be prepared for emotions to be displayed, for better or worse.
- Respect that different people will react in different ways.
- There will be questions asked that you haven't considered: be open and honest.
- As far as possible, don't treat people any differently during the process.
- Be genuinely open-minded about proposals raised during consultation.
- Provide practical information like redundancy compensation as quickly as possible in the process.

21 Grievance

Another one of the challenging activities that HR has to deal with are grievances.

We tread a fine line sometimes in HR. We have all heard someone suggest that they will 'go to HR' over something that they are not happy about at work. Sometimes, that is appropriate. Sometimes it is not, and the person that they should be dealing with is their line manager. It is critical to define the role of HR in a grievance hearing. This role should usually be about advice on policy or employment law, how to structure the meeting, even note taking. But not decision making.

There is a lot that can be said about grievances. We can summarise it in one sentence. Keep people away from the formal process wherever you can.

There is a legal requirement to have a grievance procedure. It is important that employees have a structure through which they can raise issues within employment. However, in practical terms they can present challenges.

The fundamental problem is that the processes we are legally required to follow might keep us out of trouble in the employment tribunal, but they can be damaging to the overall employment relationship. The actual issue can become lost in the procedure itself. We get out the policy and start ticking the boxes, and it becomes all too easy to lose sight of the person and the problem behind it. Even when the issue is potentially serious, it immediately forces the recipient, be it company or line manager, into a defensive place. Positions become very fixed very fast. Instead of focusing on the issue, looking at whether something is genuinely wrong within the workplace, or why the employee feels that this is their best course of action, it becomes all too easy to become focus on getting through a process or trying to make it look like the company hasn't done anything wrong.

Some grievance procedures are also far too long and have far too many stages. Two stages are all you really need to be legally compliant. We have seen procedures that have eight or more. Once you have gone through that many procedural steps, putting a working relationship back together again is a huge struggle.

So wherever possible get people to talk to each other informally to sort issues out. Use mediation where appropriate. Mediation has its limitations, but it is focused on not only resolving the presenting issue but also the future of the relationship between the parties. This just doesn't exist in a grievance procedure. A formal process requires a grievance to be upheld, or not. Someone has to win and someone has to lose. Mediation is about both people coming out feeling like they have been heard.

Recommendations for dealing with grievances:

- Tell people their rights around raising a grievance. But don't recommend it.
- Consider mediation where appropriate – not just after a grievance has been heard but instead of it.
- Look at the root causes of your grievances – not the issue writing on paper but ask what it is telling you about your culture, your line manager capability and how people are feeling.
- Train your line managers in handling conflict so that they can stop issues landing in the grievance procedure at all.
- Follow the ACAS code – always.

22 Discipline

Discipline is number three in our trilogy of 'difficult stuff'. If you seek out the official purpose of a disciplinary process, it usually says something about correcting behaviour or poor performance at work, or ensuring adherence to rules. Disciplinary policies intend to provide a framework for dealing with these sorts of issues consistently and fairly. In the UK, as with grievances, we have a formal code from ACAS that tells us how we are supposed to do it.

A disciplinary process provides a way in which employees can be sanctioned. It is the stick, rather than the carrot. Unfortunately, that stick is a large and blunt one. However, the question as to whether it ever actually achieves behaviour change is a difficult one to answer. The power of the disciplinary process rests upon the ultimate sanction: dismissal. Most of the time though, dismissal is not the outcome. Instead there are a series of warnings, escalating in severity. It is a little bit like saying 'don't do it again, or else…'

Whether people do what they are supposed to do at work is related to a whole host of factors. Some of it is down to the circumstances. Some of it is related to their personality type. Sometimes it is peer pressure, moral imperatives, incentives or even the fear of consequences.

Here's the thing. If disciplinary processes worked, you would only ever discipline someone once. Most HR professionals will tell you that this is not the case. Excessive use of disciplinary procedures can also have negative and unintended consequences on culture and relationships. But we have a legal framework and we need to work within it – if you don't you may find yourself in difficulties in the event of an Employment Tribunal in the UK. Even if there may be better ways to solve the problem in the first place.

Recommendations on managing discipline:

- Make it your last resort wherever possible. Save discipline for the most serious of issues like gross misconduct.
- Skill your managers in having effective conversations on people issues, before they escalate into formal processes.
- Follow the ACAS code of practice – always.

23 Leadership Development

If you work in HR, at some point someone is going to engage you in a discussion about leadership and management development. This is often considered separately from other L&D activities – hence it being in a chapter on its own here. You might be lucky enough to have a specialist in the area. If you don't, here are some thoughts and recommendations based on our own experiences of designing and delivering such programmes.

The main thing that we have learned about such programmes is that there is no one best one. It is all about what your organisation needs to address its specific challenges. This is your starting point. There are questions that you need to ask yourself; where are we now? Where do we want to be? What do we want our managers to do differently? What does good or better look like? If you left work and came back in a year and the programme had been a huge success, what would you see, hear and feel?

Line managers are often lamented for their capabilities. Leadership development is often seen as the answer to all organisational or cultural ills. It may or may not be. What is certain is that the relationship between the line manager and their employees is one of the most powerful, and it is often instrumental in someone's decision as to whether they stay in an organisation or not.

One of the biggest problems about leadership development, is that it doesn't stick. You get initial changes to behaviour, but after a while those who attended revert to their previous ways of doing things. There are some common reasons why. McKinsey in particular did some research in this area. Problems fall into several areas. Firstly, it isn't role modelled by leaders within organisations. If they don't do this stuff, then frankly, why should anyone else? Secondly, the sheep dip approach. Send everyone off site for a few days of classroom learning but then don't sustain it on their return. Having learning delivered in a nice hotel with fancy biscuits and an external trainer is fine – but if you can't link it back to the workplace and its everyday realities, then the development is going to suffer. Leadership development has to feel real. Whatever it is you are teaching them or expecting them to do has to feel like it can fit into their role. As with so many of the things we have discussed in this book, context is everything. Finally, the other reasons that development fails, is that we are simply asking too much of people in terms of the changes they can realistically make. Most people can work on just a few things at any one time. So pick those things carefully.

So the first piece of advice we can impart is simply to manage expectations – yours and everyone else's. You are not going to change the world, or even just the culture of your organisation, simply by sending your managers on some classroom learning. Our second piece of advice is to be very clear at the outset what change you want to see. As we said above, management capability is criticised at companies everywhere – but be specific. What do your managers do now? What do you want them to do differently? What does success look like? These questions are your starting point. And once you have answered those, here are our further recommendations:

Recommendation for leadership development:

- Before embarking upon any programme – make sure you understand and are treating the *real* people management issues – and not just treating the symptoms.
- Any potential supplier should take time to understand your challenges and design an appropriate programme. If they try to sell you something off the shelf, then stop the conversation.
- Include coaching somewhere. 121 coaching is one of the most powerful interventions you can provide people – and the tools to coach other people can be transformational too.
- Include a self-awareness tool somewhere too. It might be a 360°, or a strengths finder, or some other sort of profiling tool. Improving self-awareness and space for reflection is key: if someone already thinks they are 100% awesome, the rest of the programme is going to be a challenge.
- Ensure that your senior leaders are committed and prepared to role model the changes you are seeking. Without this change will be hard to sustain, and the development and investment undermined.
- It has to be ongoing. You need to keep coming back to it, talking about it, reinforcing it, adding to the toolkit. The best leadership development programme isn't a programme at all – it is an ongoing journey of learning supported by the company.

24 Exit

Employees leave a business for many reasons. Some of them we have already discussed; the exit is as a result of the behaviour of the employee, or as a result of a redundancy situation.

An employee may also exit by way of a simple resignation to take up a new post. Retirement, TUPE, ill-health, capability – these are just some of the other reasons.

Some exits are a good thing, some are more of a challenge, and some are seriously detrimental. Here are our thoughts on dealing with the various implications of employees leaving.

There are two things we would note first of all. Number one is that some exits are nothing to be concerned about; the job for life is no longer a thing for many, if indeed it ever was. And secondly, in the right circumstances, those leavers might come back in the future and work for you all over again, so it is important to ensure that the process of leaving is as good as the process of joining, wherever you can.

Although it is sometimes seen as a negative that people leave, this isn't always the case. Some turnover is a good thing. Sometimes you develop people so well that they leave. But as the saying goes, better that than you don't develop them and they stay!

When it comes to exit management, how it is done and how it should be done vary depending on the reasons for that exit. There will be times when you need to put someone on garden leave. There will be times when you want/need to use a Settlement Agreement. Sometimes you will need to think about enforcing Restrictive Covenants. Each of these areas is a specialist one, and turns both on the facts of the situation and often the individual contract of employment as drafted. So we can't get into dealing with these here, other than to recommend that you take the appropriate advice where you need too.

We do need to talk about exit interviews for a moment. This is something that lots of organisations do, and it usually is the responsibility of the HR department. Exit interviews can provide you with lots of useful data about why an employee is leaving your business. However, it is only useful if you do something with it. All too often, exit data is collated, maybe turned into a graph or two, and filed. Most people end up categorised as leaving for 'personal advancement' or some such similar term. If you are going to do exit interviews, do them properly and do something with the data. Share it with senior leaders and have a dialogue about what it is telling you, expressly and the subtle messages underneath.

Finally, we live in an increasingly social media-driven world. Often what happens at work ends up on Facebook, Twitter or Glassdoor. Be mindful of this important fact, however privately glad you might be to see the back of someone.

Recommendations for managing exits:

- Keep in touch. Consider for example a LinkedIn Group for Alumni. Your former employees might also turn out to be your future talent.
- If you can't do anything meaningful with exit interview data, consider just not bothering.
- Do keep an eye on leavers in the early months. An excess of turnover under a years' service might mean that you have an issue somewhere, whether that be induction, training, or a disconnect between the job as advertised and the reality.
- Only hold people to long notice periods if you really need to. If the employee has mentally checked out, then you might as well just let them go.
- If everyone is leaving for personal advancement, then make sure you are asking the additional question: what are you getting at your new place that you can't get here?

Part Three:
Putting it into Practice

25 Non Value Adding Work

Here's a thing. HR departments (as with many other parts of organisations) can often be full of work of low value, or even no value at all. And the more time we spend doing this sort of activity, the less time we have to deliver work that either people really appreciate, or that adds positively to the organisation. How much work of little or no value are you doing? Sometimes it is hard to tell. We do many things unquestioningly just because we have always done them, or everywhere else does them. We do things because we think people need them or value them, when we don't know for sure that is the case.

If HR can minimise or even eliminate non- or low value adding work, then we will be free to do something more useful instead. Low value adding work is producing reports that no one reads. It is policies that state the obvious. It is paperwork for the sake of paperwork. Things that are done 'just in case'.

Everyone has it. They just don't always recognise it. Let us give you one example. The humble exit interview that we have already mentioned in an early chapter. Done everywhere. Accepted as best practice (see the upcoming chapter on that concept!). But in many companies, read and noted by HR, shared with one or two people, filed away, and not used to make any decisions or make any improvements. If you are doing something with your exit interview data, that's great. Keep right on. But if you aren't, then why are you bothering to waste everyone's time doing them at all?

We recommend looking at every single thing you do, and asking yourself these questions:

1. Can you simply explain the value of the HR activity to a non-HR professional?
2. Does anyone do anything with the output, or use it to make decisions or changes?
3. Does it help change your culture, or improve people's skills?
4. Is there a very good business reason?
5. Is there a legal requirement to do the process or does it **significantly** reduce legal risk to the organisation?
6. Does it fit at your place?
7. Is there anything you are doing, just because you believe it is best practice?

If you can't say yes to at least a couple of these questions, then we recommend simply stopping doing it (ideally, without telling anyone – you will soon know if anyone really needed it because they will shout loudly). And then figure out what you can do with all the time you get back.

26 HR Information Systems

First things first – you need one. It doesn't have to be an industry leading one, or a hugely expensive one, but if you try and operate without a system you are always going to struggle to answer even basic questions about your workforce and will probably spend way too much time on routine administration too. So even if you are reading this book as a standalone professional or have a very small team and even smaller budget, we would urge you to look at a system anyway. If you are handling your employee data in files or spreadsheets, you will find it hard to spend time on value adding activity – and you will be inevitably be undertaking activities that you can and should empower your line managers to do.

The first point of a good HR Information System (HRIS) is to relieve you of the burden of that stuff most HR departments have a load of: routine lifecycle administration. It should automate everything that can be automated. The second point of a good HRIS is to provide you with lots of useful data on all your people stuff, to enable you to share useful insights and hold meaningful conversations.

Some systems are just for core HR stuff (names, addresses, job, location etc.). You may then have others (or different parts of the same one) that include an Applicant Tracking System or ATS, for all your recruitment activity, or a Learning Management System or LMS, for recording and managing all of your learning and development activity. Still others could include your payroll and benefits administration.

Here are some things that we have learned – in some cases painfully – about implementing a HR System.

1. It will take longer than you think.
2. Even if it looks really easy to use to you, some people will find it difficult.
3. People like their usual ways of doing things and may resent the changes you are making – unless you explain your rationale and what is in it for them.
4. People will be concerned about their personal data. Even if it has been held in a system previously and this is just a new one, it will bring this issue to the forefront of their mind, so have the answer about security and access ready to hand.

Finally, before we get into some practicalities, when it comes to HR systems, start with the end in mind. What is your overarching goal? Is it about streamlining the admin burden? Is it about better data? Is about an easier way to recruit or help people learn. Understanding this will help you make the best software decision.

Practical things to look for when considering a new system:

- The range of analytics provided – you want to be able to get your hands on as much data about your people as you can, in the most straightforward way – as well as be able to put this ability in the hands of your managers.
- The ease of linking it to other systems, such as your intranet or other existing systems you don't want to change.
- What is standard in the project delivery and implementation, and what will they charge you extra for in terms of development costs.
- Make sure it is self-service! Most systems are, but this gives you the opportunity to hand over the responsibility for some of the routine stuff to your own employees.
- Find out what help you can get around training.
- Check who owns your employee data, and how easily you can recover it, in the event that you want to move suppliers.
- Check if it is mobile enabled or has an App.
- Size – some systems work better for small organisations, some for larger. Check the size and complexity of the clients and organisations already using any potential supplier.
- Begin with a list of 'must have' functionality and capability and a nice to have. Do not progress with a system that doesn't have your entire 'must have' list – this will help you retain your focus and make sure you don't get caught up with something that looks great but doesn't deliver everything you need it to.

Recommendations for HR Systems:

- Think very carefully about what data you want to import into a new system. Often, people transfer everything that they hold, either on a paper file or an existing HR system. The truth is, you probably rarely look at historical stuff. So balance the effort of the transfer versus the value of holding it in all one place. You can always dig out the old paper file when you need it.
- The data input or transfer is a critical step in the process: if your current data is rubbish (out of date, unreliable, error-filled), you may be better off in the longer term starting from scratch.
- Go with the standard option where you can. The more you develop a system to fit your processes and ways of working, the more hard work you are making for yourself in the long term. Take a new system as an opportunity to rethink the way you have always done things and consider doing it the systems way rather than retro fitting a system around you.
- Get your IT team involved. They will have much more experience in this area than you will.
- Make sure any contract has robust clauses on Data Protection and who is responsible for it (including any fines!) in the event of a breach.
- Don't forget that some people will struggle with technology, even it looks simple to you and your team. Help them along the way and be patient.
- Do something with that plentiful data your system provides you – share it, let it support your decision making…. Otherwise, it is just a glorified spreadsheet.
- When it comes to the business case for whichever system you choose – make it clear to the wider organisation what you will be doing with all the time it gives you back – how it will enable your team to add even more awesome HR value.

27 HR and Best Practice

Despite what they tell you at all of the HR conferences and in the articles and books from thought leaders, we will say one thing (repeatedly):

In HR and in people management, *there is <u>no such thing</u> as best practice*

Management thinking comes and goes; society shifts its priorities and beliefs; academics research and publish new thinking. However, particularly as HR people, we are often urged to implement this or that approach because it's considered to be "best practice". We strongly believe that there is no single "best" for your company or any company. There are many ways to deal with most management situations and only you will know all of the variables that need to be taken into consideration in your circumstances.

As we mentioned earlier on, the only company that should try to be Google is Google.

It's absolutely right that you should pay attention to what others are doing – there may be things you can learn and tweak to suit you. Be curious and read as widely as you can to understand new ideas that are developing. Listen to advice from consultants, management gurus and wise people. Spend time on Twitter reading what other people are up to and what the latest thinking is. But please, never believe there is only one "best practice" way to do your HR stuff. What is most important is what is right for you and your organisation.

28 The Role of the Line Manager

We've focused so far on the role of HR, and things that are within our main areas of influence. Of course the role of the line manager cannot be underestimated when it comes to employee engagement and experience. When we use the term 'line manager', we mean anyone within your organisation that has the responsibility for managing people. Of course this varies significantly from place to place from what is expected of that role, the size of the team and the nature of the role types and individuals that are managed.

If there is a relationship capable of going wrong, in our experience it is the one between HR and the line. So where does conflict arise? One potential area for conflict is lack of clarity about who is responsible for what. Generally speaking, managers should be responsible for all the routine day to day people management activities from work allocation to a return to work interview. Then there are all the requirements around development, from the performance review to 121s to objective setting. Recognition, reward…and many of the other areas we have already talked about.

In the more traditional personnel/welfare model per Human Resource Management, sometimes HR folks (or more likely, the Personnel Officer) undertook some of these responsibilities. Especially the not so nice ones. Most HR professionals will have more than one story about a time when a manager has wanted them to take responsibility for a tricky employee issue or a difficult conversation.

In recent years, especially where HR has been required to cut costs, there has been more people-related activity devolved to the front line. And that is exactly where it should be, in our view. The role of HR is to enable, support, guide, coach and advice. HR is there to create the conditions and the framework. HR should be on the edges of the relationship between employee and manager. When HR steps in, this disempowers the line manager, and takes away their opportunity to learn. But it can make their life easier in the short term, so the pressure often remains to get HR to do this stuff, whether it is front a redundancy process or pass on a difficult message.

How can HR best work with line managers, and provide them with the skills they need to lead people effectively? First of all, clarity is needed about the role of HR. Be very clear (and agree wherever possible) what is the responsibility of HR and what is the responsibility of the people manager.

Help them understand what you are doing and why. Getting this right is also important. You want them to genuinely own the people stuff, not be starting conversations with 'HR said…' Those managers that do that need to be tackled, and tackled fast.

One final thing. If you happen to find yourself in one of those organisations in which HR has traditionally not had the best of reputations, you can change it. It might take time, but it is possible. Your personal reputation as a trusted advisor will go a long way to getting rid of any negativity to HR that exists within the organisation.

Recommendations for working with line managers:

- Train them. There are two sides to this. The first is to provide the practical skills that they need to do the day job. Think how to do a return to work interview or how to handle a flexible working request. Then educate them on subjects like engagement, motivation, the science of how people learn, what happens when people are appreciated. This brings the practical stuff to life.
- Involve them. Share your plan, take their feedback. Doing good people stuff is a partnership with a mutually beneficial outcome.
- Be a partner and a teacher. Not a parent or a doormat.
- Communicate. Often and well. In our experience, when relationships between HR and the line break down, this is sometimes because they don't know why you are doing what you're doing, or what is in it for them.
- Be clear about what people responsibilities sit with HR, and what responsibilities sit with them. Resist at all costs taking on work that should sit with the line manager – by taking it on you are not helping them and you are creating yourself long term pain.
- Be a great HR department. See our earlier chapter….

29 Making the HR business case

Making the business case for any Human Resources activity or investment can be challenge. Often, HR comes under cost pressure, even though for many organisations its entire costs are just a few percent of the entire business overhead.

The extent to which you come under cost pressure is often directly linked to the value placed on the activity itself. Where HR is not valued, it will be starved of resources, financial and otherwise.

Here's the problem: some of the people stuff is very hard, if not almost impossible, to show a neat Return on Investment. Much of the people stuff doesn't appear to be business critical in the short term – which can make it so easy to cut. When businesses find themselves in difficult times, the first thing to disappear is usually the learning and development budget. Usually, if you stop developing people, the impact in any given financial year is negligible. It only shows itself over the longer term, when people start to leave or when skills start to become out of date, but this can be three or four years down the line.

Equally, when you do make investments in these areas, the return on investment is long term too. If you send a manager on a leadership development course, and as a result they become better at managing their people, how do you evidence this? It may only show up over a lengthy period.

If you are struggling to make the case for HR at your place, here are some thoughts from us.

However you choose to present it, by written document, verbal presentation or even some PowerPoint, there is standard stuff you need in a business case every time. We'd always include:

- An overview of your proposal with an executive summary (newsflash: most people will just look at the executive summary before deciding whether or not to read the whole thing).
- A statement of the current problem that you are proposing to address.
- An analysis of the costs and the potential benefits – both financial and non-financial.
- Consideration of the options and the risks, including the risk of doing nothing at all.
- The decision that needs to be taken.
- Evidence where appropriate.

As we've said, evidence can be tricky for some areas of HR. But that doesn't mean that there isn't any. First of all, let's take productivity. The UK has something of a productivity problem; it is stagnating. We lag behind other EU countries and the US and Canada. The prevailing wisdom, certainly in the HR circles that we move in, is that happier people produce more; a view that has also been supported by academic research. However while this argument is seemingly happily accepted amongst most HR practitioners, it may be less attractive to some of our colleagues and managers. So you can make some assumptions about how you might increase engagement, productivity or even people's attitude to their work. Just be careful to keep them reasonable or risk reducing your credibility.

When it comes to benefits, it might be that your proposal is about saving cold hard cash. Excellent if it is; that is sure to make the eyes of any Finance Director light up. But savings might also mean time too. If you automate something, how much time in total is it giving back your employees or your line managers to focus on their day job instead? As well as savings, what can you increase or improve?

Recommendations for making the HR business case:

- Don't over promise and under deliver.
- Identify early on who your key stakeholders are – who do you need to influence, who do you need to help understand why? Understand the audience. What is in it for them? You need to tell/sell them the story and the solution.
- Give some consideration to who is likely to disagree, be cynical or resist your suggestion. Work out what your responses will be to their objections and have them ready.

- If you get a yes, get on with it, but measure your outcomes, results and changes, and update those who made the decision.
- Try to include a mixture of hard measures including data, but include some softer ones too around feelings, engagement, attitude and culture. If you can't measure them accurately, say so.
- If you have useful sources of external data, use them.
- Use internal sources of data too – time spent on activities, turnover, absence data, employee referral rates, recruitment agency costs – you might have more than you think.
- Keep your formal document or presentation free of HR jargon.
- Include a timeline for both the project and the realisation of benefits.
- Always, always, link your proposed HR investment back to the overall business objectives and goals.

30 Social Media

We are both self-confessed social media addicts – a label that we are just fine with – so it was inevitable that there would be a social media chapter…

We think that social media is a fundamental skill for HR professionals to learn and that too few of us take it seriously. It also provides you with opportunities around how you do all of your people activity. So we have this on our list of skills that you need to get, if you want to deliver great HR. There are two reasons. Firstly, social technology is the future of, well, everything. And learning it keeps you relevant and helps you help your business make the transitions that they need to make in this space. Secondly, and even more importantly for those HR folks in small organisations and will small training budgets – there is one heck of a lot of learning out there for you on social media platforms.

In our experience, discussion about social media in HR circles is often still negatively framed and is a stick that less-scrupulous employment lawyers (yes, there are some) use to beat us into a state of panic. How do we control it? How do we stop people saying certain things? How can we lock it down during working hours? How can we make sure people aren't wasting time on it? What does the latest case law say about it?

Our message for those working in HR is a simple one. We have an opportunity, perhaps a better one than ever before, to help our organisations make the transition to new ways of working. We can move our function beyond the transactional, service-style HR that we sometimes find ourselves trapped in. We can lead the way for this social stuff in our organisations and help people (including the senior management team) along the journey.

We understand that that not everyone wants to do social media. Some people feel it is not for them. Some people have said to us that they don't get it, they don't see how it is relevant to them, they don't see the point. We will deal with the myths later on.

But for us, it is a simple choice. Embrace change or get left behind. Hang back or get ahead. Instead of being overly concerned about the risk, we instead advocate embracing it instead.

From an HR perspective:

- You can use social media to help you recruit and build your employer brand.
- You can use social media to help drive employee engagement.
- You can use social media for learning.
- You can use social media for internal communications.
- You can use social media to support and drive culture change.

Social networks have the power to change organisations. Change the way they communicate, share knowledge, incite innovation. Social media changes the way people learn and build relationships.

This is all people stuff and people stuff is what we do!

For those HR professionals who are yet to put a toe in the water themselves, the best starting point for determining how social media is best used within your organisation is to get out there and get social, and try it for yourself. You will find a warm, welcoming, and supportive global HR community, who are willing to share and engage. As long as you act sensibly and reasonably (and of course you will, you work in HR!), you really don't have anything to lose: trust us!

Recommendations for getting social:

- Set up a Twitter account and follow lots of HR people. As many as you can. Starting with @HR_Gem and @TimScottHR, of course.
- Start reading HR blogs. There are plenty out there, many written by experienced HR professionals who are sharing what they do and how they do it. A search of the term 'HR blogs' or the hashtag #hrblogs will take you to everything you need – including our stuff!
- When you feel ready, dip a toe into the conversation. Many people worry they don't have anything to say or they might say something silly. Well that's true of all of us every time we open our mouths so we say go for it!

31 Ideas, Tips and Random Thoughts

As we have said several times already, HR is most effective when it is tailored to the needs of the individual organisation in which it is set. There is no one size fits all or best practice. There are however, some universal things that we would recommend you do, or avoid doing, wherever you are doing HR.

Here are our top tips for HR professionals everywhere:

1. Beware of the word 'precedent'. An employment tribunal will broadly expect you to treat people to a similar standard. But neither it, nor equality legislation, requires you to treat everyone the same. Doing something because it is 'precedent' or because you might set one, is a pretty poor reason for doing anything or nothing. Consider every set of circumstances on its own merits.
2. Let your managers make the final call on their people stuff. It is after all, their team, their budget, their responsibility. Offer clear advice. Explain risks and potentials. Provide options. Tell them what you would do. Then empower them to do what they feel is best. Only intervene if they are exposing the business to unacceptable risk.

3. Get out of your office and talk to people. A common complaint about HR is that they are out of touch with what is going on in the 'business'. This is an accusation that cannot be thrown your way of you know what is going on.
4. Stop talking about 'the business'. You *are* the business. So make sure you understand it too. Don't just turn up for the people bit on the meeting agenda. This doesn't make you a partner, it makes you one dimensional.
5. Don't blame line managers. If people are not cascading your comms, following your policies, doing their performance reviews then it's up to you to find out why.
6. Before you introduce anything new ask yourself these questions: does it make people's lives easier? Does it make things better for the people who work for us? How will this make people feel?
7. It is a good test when considering a decision or a policy approach to simply ask yourself; if this was me, how would I want to be treated?
8. Run the race you are in. The only people who should be Google or Zappos, are Google and Zappos. Be good for you with your resources and your context. Define your own value add.
9. Do good people stuff. Always.
10. Let HR lead the way. No one knows the people stuff better than us. Don't be afraid to stand up for what you believe in and make sure your voice is heard. Never apologise for wanting to do good people stuff: if someone doesn't value it that says more about them than it does about you or what you do. Be proud to work in HR.

And finally, never, ever, worry about your seat at the table.

32 And finally…

We are nearly at the end of this little book.

We are going to finish by saying again what we said at the beginning. How you do HR, at your place, is up to you. You don't have to follow some sort of best practice. You don't have to do what went before. We have talked a great deal about adding value – you need to define what this means, how and to whom. To be truly effective, HR practice should be tailored to the context within which it is set, and for the particular needs and demands of its own unique organisation.

HR is not always an easy job, but it can be a truly fulfilling one. You will develop a unique understanding of your organisation and its people. You can get to have an influence over how those people learn, feel, develop. You can make their working lives better and more interesting. As a career it has breadth and the opportunity for continuous personal growth. There are some amazing people working in HR. The CEO of the CIPD, Peter Cheese, is fond of saying that there has never been a better time to work in HR. We agree with him. Our agenda is simply huge. There is more of an understanding of the vital roles of organisational culture, people contribution and neuroscience than ever before.

At the same time, there is still much to be done to increase this understanding and push forward the relevance and value of this thing called Human Resources.

We hope you have found this little book helpful, and we wish you well in everything that you do to make work a bit better for people at your place.

The Human Resources Terminology Guide

HR is full of jargon. So if you have come across a term or a phrase that you can't explain whilst reading this book, then here is our handy guide to help you out.

ACAS

www.acas.org.uk

UK organisation whose role is to provide services for employees and employers to help prevent or resolve workplace problems – individual or collective. Offer mediation and conciliation, training and advice. The ACAS Helpline and website are fantastic sources of free information.

ATS

Stands for Applicant Tracking System. It means an IT system used in recruitment for managing vacancies and candidates.

Bradford Factor

A way of measuring absence and its impact at work – focuses on identifying short term and disruptive absence. Used by many organisations within their absence policy to determine when absence has become unacceptable. A little too formulaic for us if it is used rigidly. The more devious employees get wise to it quickly…

Business Partner

A role within a HR team that is used to describe someone who works in partnership with an area of the business to support their strategic aims. Has become popular in recent years. Means very different things depending on the organisation and the role in practice can have very different requirements and responsibilities.

CIPD

http://www.cipd.co.uk

The Chartered Institute of Personnel and Development – the UK's professional body for HR and people development. Their website has a wealth of information about working in HR and, if you are a member, free access to their "how to" guides and lots more practical advice. Also very nice people who let us blog for them at their conferences sometimes.

Competencies

Behaviours and attributes sought by a company for its employees. Often used in conjunction with a 'competency framework', which is usually a list or structure describing a set of behaviours, sometimes with detailed definitions and examples. Often used in recruitment and performance reviews.

Corporate Social Responsibility (CSR)

Organisations giving something back to the community. Typically larger organisations run programmes around doing some social good which can range from being a fundamental part of their business model to a 'greenwash' or basic window dressing. Becoming increasingly popular, they often have people-related elements such as wellbeing.

DCM

Don't come Monday. A euphemism for dismissal.

Downsizing

Another attempt to dress something up as not as bad as what it really means, which is usually 'redundancy'. Has also been known as the even more awful 'rightsizing'.

EAP

Stands for 'Employee Assistance Programme – a scheme offered by some organisations to their employees which typically offers helpline access to advice, counselling and support on personal issues such as legal or financial problems.

Employer Brand

How your organisation is perceived by its employees and the external world. Sometimes referred to as 'what people say about you down the pub.' Exists whether you control it or not.

Employment Tribunal

https://www.gov.uk/employment-tribunals

The place in the UK where legal employment disputes are heard. Avoid being taken to one wherever possible but attending as a visitor can be very valuable training for managers and HR professionals alike, if only to see what happens if you do get people stuff wrong. You can usually just call up your local Tribunal and ask to come along to see a case.

Employee Voice

Any method by which employees express their feelings about an organisation. This can be formal, like through a consultation committee, trade union or employee survey. It can be less formal too, including comments made on social media.

Garden Leave

Asking an employee to stay at home and not work, but still receive their full benefits. Usually used during the notice period. You do need a contract clause to enforce it. It may or may not include actual gardening.

HCM

Stands for Human Capital Management – a phrase we are decidedly not keen on. It means that employees are seen as assets on a balance sheet. A bit controversial. We prefer to think of humans as people, not assets.

HRIS

HR Information System. Any dedicated HR software that allows for managing employee data.

Job Evaluation

A structure or a process for defining or ranking where a particular job sits within the organisational hierarchy. Typically takes into account factors such as seniority, responsibility and scope. Often linked to which rewards people are entitled to.

Nine box grid

A tool used in talent management to identify talent by categorising employees by potential and performance. Widely used. Somewhat contentious.

On-boarding

What we used to call 'induction' before it had a makeover. The process of how you introduce employees to the organisation as a whole. Starts from the offer of employment.

Performance Improvement Plan

A process used by some organisations as part of performance management or capability. Employees are given a plan to follow, and formal action usually results with non-compliance or when there is a failure to improve.

Performance Management

The process of managing the performance of employees. Can mean either an appraisal process, or dealing with under performance. Also sometimes used as a euphemism for dismissal.

Performance Related Pay

Does what it says on the tin. A link, which can take place in a whole range of different ways, between the performance of an individual to their (usually) base pay.

RemCom

Short for Remuneration Committee. An external panel, usually found in a PLC, that oversees and makes decisions about remuneration – sometimes just for senior executives.

Restrictive Covenant

Part of a contract of employment that places restrictions on employees after they have left the business. Often refers to confidential information, not attempting to steal customers or other employees, or may seek to prevent people from working for competitors. Needs to be reasonable to be enforceable, and equally need to be very well drafted. Can be expensive to enforce even if this is achieved.

RPO

Otherwise known as Recruitment Process Outsourcing. Which means outsourcing your recruitment to a third party. A strange halfway house between doing it yourself and using recruitment agencies.

Seat at the Table

Something that gets talked about too much in our humble opinion. This is a traditional HR preoccupation with whether or not they have a 'seat' (or more accurately a voice) around the Boardroom table. Basically, it is shorthand for HR being taken seriously in any given organisation or generally.

Settlement Agreement

A legally binding document sometimes used to set out the terms through which an employee leaves the business, often (but not always) where there has been some kind of dispute. Used to be called a Compromise Agreement. Requires careful drafting. Take legal advice!

Shared Service Centre

See also 'Ulrich Model'. Part of a HR team in some organisations, usually focused on routine life cycle administration, payroll and the production of Management Information. Sometimes provides first level HR advice.

Social Recruitment

Using social media to recruit or to spread your employer brand message.

Talent Management

A term that covers many things and can mean different things at different places. Essentially is all about how you attract and recruit talent, and then how you develop it, engage it and retain it. Often focuses on employees who have been identified as high performers or those with high potential to the future of an organisation.

Ulrich Model

From a book by Dave Ulrich. Means organising a HR team around a three part structure – business partners, a shared service centre and centres of excellence (think learning and development, employee relations etc.).

Values

A desirable set of behaviours that organisations want employees to understand and embody. Most organisations have defined some, but fewer successfully turn them into something that is well understood, embedded and embraced.

War for Talent

A horrible phrase that emerged in the 1990s (thanks to a McKinsey report) to refer to the fact that a skills shortage is coming and that premium candidates will be in demand. No sign of hostilities commencing just yet.

About the Authors

Gemma Reucroft

Gemma Reucroft is an HR Director in the healthcare industry. Gemma is a Fellow of the CIPD, and a regular speaker and writer on a variety of HR topics including employee engagement and social media.

Gemma describes her HR philosophy as being all about doing good people stuff.

Gemma is a blogger on all things HR, and has two blogs www.hrgemblog.com and www.careergem-blog.com Gemma is a regular conference blogger, and also writes for the HR Director Magazine, as well as being a member of the HR Director Magazine editorial panel. Gemma also contributed to the best-selling HR books, Humane, Resourced and Humane, Resourced 2.

Gemma has held a variety of HR roles including leading teams in employee relations, resourcing, service delivery, internal communications and business partnering. Many of her roles have involved transforming HR teams and developing effective HR solutions and policy. Gemma has an MA in Employment Law and Industrial Relations from Keele University and is also a mediator and coach.

A big fan of all things social media, you can also find her on twitter as @HR_Gem.

Tim Scott

Tim is an HR professional and Chartered Fellow of the CIPD with almost twenty years of generalist experience in roles across the private, public and voluntary sectors.

A self-confessed social media convert, Tim is active on Twitter (as @TimScottHR), blogs at www.timscott.net and for a number of other sites and contributed chapters to both volumes of the best-selling "Humane, Resourced" series.

Tim is currently Head of People & Organisational Development for Brook, the UK's leading provider of sexual health services and advice for young people. Throughout his career he has worked effectively with senior management teams, developed people-focused HR teams and designed and implemented business-appropriate people practices, often in organisations which previously had little or no dedicated HR leadership. He says his career aim is simply "to make things better" wherever he is working.

Also available from the same authors:

- HR2025: The Future of Work – Managing People (BookBoon)
- Putting Social Media to Work: A Practical Guide (Amazon)