



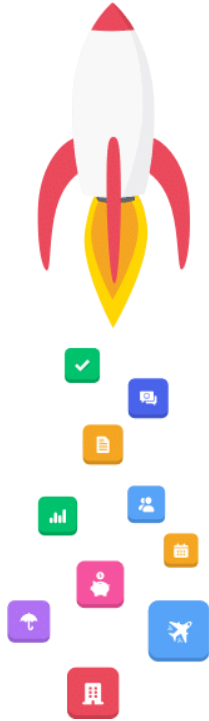
How Smaller HR Departments Effectively Manage Multiple Priorities

Presented by:

Michelle Coussens | Business Strategist | Plan B Consulting

Sponsored by:





About GoCo

Our mission is to help small businesses spend **less time on manual HR tasks**, so they can focus on growing **happier, more productive teams**



Meet the Expert

Michelle Coussens | Business Strategist | Plan B Consulting



Michelle Coussens is a frequently sought-after speaker and business strategist for numerous types of organizations on a wide range of topics related to the workplace, including but not limited to talent management, business strategy, and operational effectiveness.

She is a resourceful, resilient, and relentless business professional with demonstrated success in building new programs, driving short-term efficiencies, and improving long-term effectiveness all through innovation, rigor, and courageous leadership.

She has direct experience with a variety of industries, as well as in consulting, education, and not-for-profit organizations. With consistently high participant ratings, her webinars, seminars, and speaking engagements bring practical value to businesses of every size and type.

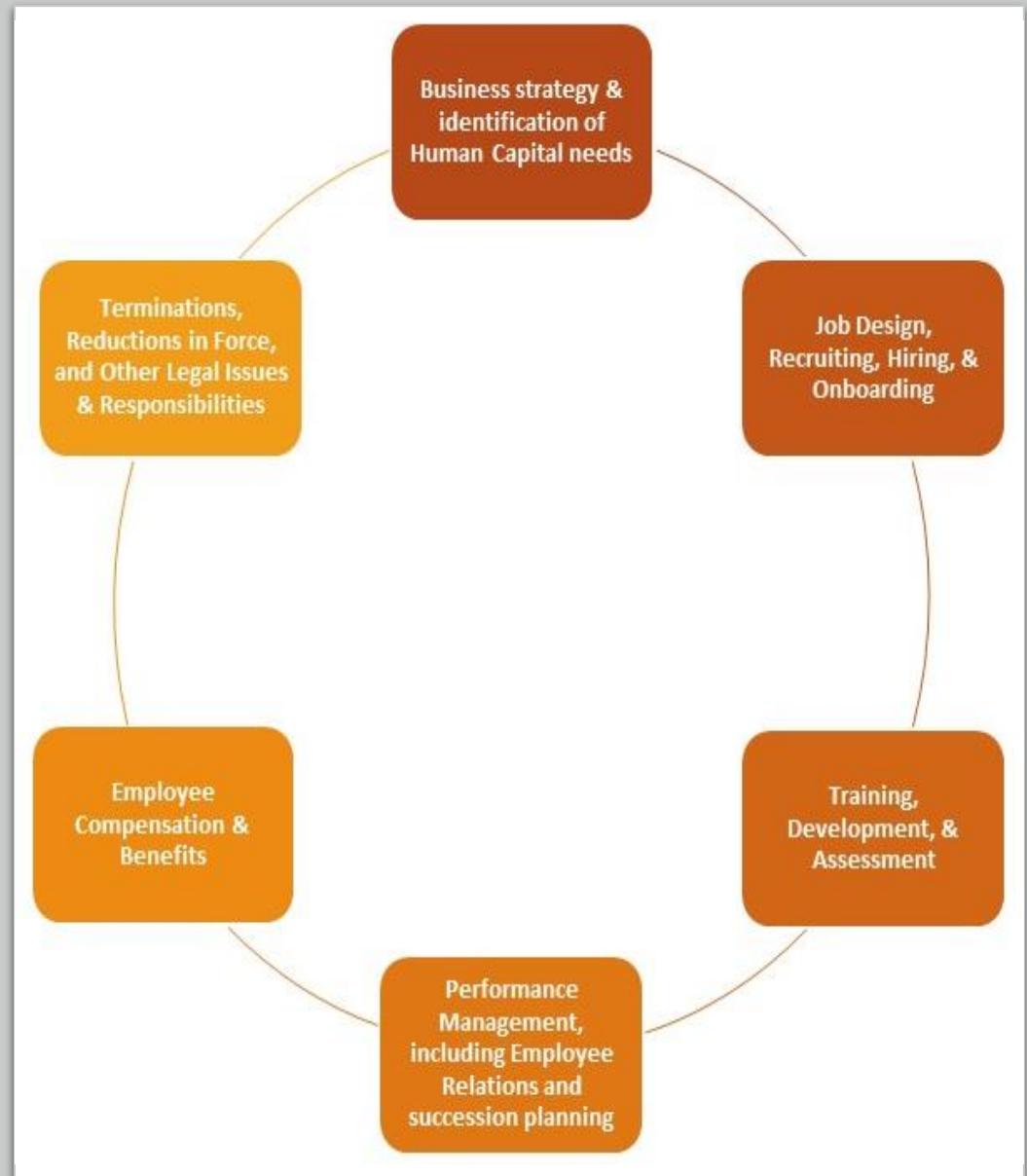


Session Deliverables

- **Strategies to help your team move from “busy” to impactful**
- **Methods to determine what assignments come first**
- **What to do to avoid uneven staff member workloads and to set realistic timelines**
- **How to help people help themselves through processes that allow employees to be their own problem solvers**
- **Ways to identify opportunities to cut waste without increasing errors or impairing people or processes**
- **Critical components of a productive work week—in general and for HR**
- **Ways to nurture and enforce positive work habits that motivate individual staff members**

The role of HR

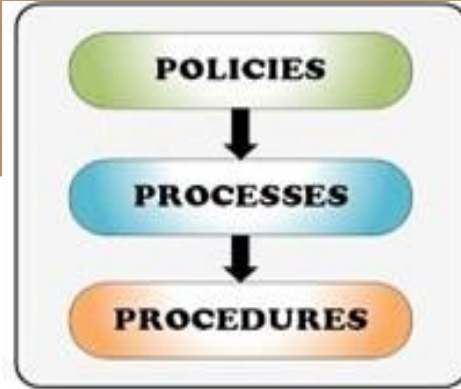
- **Traditional definition**
 - Tactical and procedural
 - Distinct, centralized function in one part of the organization
- **Today's definition**
 - Strategic
 - Focused on talent acquisition and management
 - Numerous challenges
 - Expanded roles and responsibilities
 - Short-term vs. long-term
- **Roles**
 - Functional Expert, Employee Advocate, Strategic Partner, and Human Capital Developer



How to be more
efficient & prioritize
better



Develop clear roles, responsibilities, and SOPs



- Empower your staff and employees with knowledge and operating guidelines needed to effectively and efficiently do their jobs
- Provide effective first line of defense against potential of regulatory non-compliance
- Help your organization operate more smoothly and efficiently

Policy	<ul style="list-style-type: none">• A mandate and directive from the board, regulatory bodies or executive director• Its primary purpose is to influence behavior in a very specific manner• Overarching principles under which your organization operates
Process	<ul style="list-style-type: none">• A high-level set of related tasks that must be completed to deliver to your customers or ensure compliance with a policy• Usually involves several tasks or sub-tasks, more than one person, more than one department and multiple procedures and work instructions
Procedure	<ul style="list-style-type: none">• A specific, detailed series of actions that staff must take in order to implement a process and comply with a policy• More specific about how a specific task or activity in a process will be accomplished

Framing operational efficiency



- 1. Clearly define roles and responsibilities of staff members**
- 2. Establish clear policies and procedures**
- 3. Clearly document all business-critical processes**
- 4. Institute clean desk policy organization-wide**
- 5. Cross-train staff across activities and services**
- 6. Institute a single point of entry for all HR systems**
- 7. Establish and strictly comply with checklists at all employee touch-points**
- 8. Do not start processing work until all required information is received**
- 9. Ensure availability of right sized equipment and space**
- 10. Transition from paper to electronic documents and records, including electronic signature process**

Identify opportunities to cut waste

- Waste is anything that does not add value
- Before waste is removed, processes are usually scattered and unorganized, which negatively affects others
- After waste is eliminated, processes are streamlined, which results in satisfied workers and saves the organization time and money
- There are 8 kinds of waste:

Type of waste	What is it?
Defects	Errors, mistakes and incorrect information
Over Production	Processing too soon or producing more than required
Over Processing	Processing more than required
Inventory or Backlog	Holding more than required; Not processing fast enough
Transportation	Movement of items that does not add value
Motion	Movement of people that does not add value
Waiting	Employees and customers waiting for others
Under-utilization of People	Employees and volunteers not leveraged to full potential

Take process-related steps

- **Address all process variations, exceptions, interdependencies, and supporting processes and procedures, and including performance measures**
- **Identify and modify other ancillary, upstream and downstream processes related to the service line processes**
- **Regularly review processes with stakeholders around expectations, gaps and issues**
- **Make sure your staff, processes and technology are appropriately aligned**
- **Streamline and validate data collection at all stages of each process**

Link people, processes, and platform

People	Ensuring that your board, management team, staff, volunteers, partner organizations and customers consist of the right skills, experience and attitude and are sufficiently empowered to help your organization move forward
Processes	<p>After your team is in place, working through process-related steps</p> <p>Remember: if the processes is broken, technology will not fix it!</p>
Platform	<p>After people and processes are in place, looking at how applications, processes or technologies will help you improve and scale your business model</p> <p>Remember: technology comes last!</p>

Multi-tasking rarely works.

- **Fragmenting our attention leads to less deliberate action. In addition, it can cause:**
 - Excess/undue stress and burnout
 - Declining ability to concentrate
 - Lack of completion of tasks
 - Decline in quality
- **Avoid the “complexity trap” associated with excessive task-switching**
 - Avoid switching hard and soft costs
- **Some recommendations*:**
 - “Do less, then obsess”
 - Practice “disciplined collaboration”
 - Follow “Occam’s Razor”

Create Sound Routines

- **How do you start and end your workday?**
- **Are there opportunities to create new routines for yourself and others?**
- **How do you determine your work priorities on a given day?**
- **Do you plan time for crises and interruption?**
- **Do you schedule time to handle communications (email, voicemail, etc.)?**

**Great at Work: How Top Performers Do Less, Work Better, and Achieve More, by Morten T. Hansen, 2018, Simon & Schuster.*

Determine which tasks are crucial and which to deprioritize



- ***Are you efficient? In what ways?***
 - Doing things right
 - Productive use of resources
 - Turn-around times
 - Manual versus automated efforts
 - Continuous improvement
- ***Are you effective? In what ways?***
 - Doing the right things
 - Actions in line with organizational priorities?
- **Which of your activities produce the most impact?**
- **What will it take to continue to be successful?**
- **Is there anything you should **STOP** doing?**

Determine what and when to delegate

- **What CAN be delegated?**
 - What CAN'T?
- **What SHOULD be delegated?**
 - What SHOULDN'T?
- **WHY delegate?**
 - Best use of resources (people, time, money)
 - Development opportunities
 - Job enrichment and empowerment
 - Addresses 3 higher-level needs:
 - **Desire for mastery**
 - **Sense of autonomy**
 - **Need for a driving purpose**



Be clear on expectations

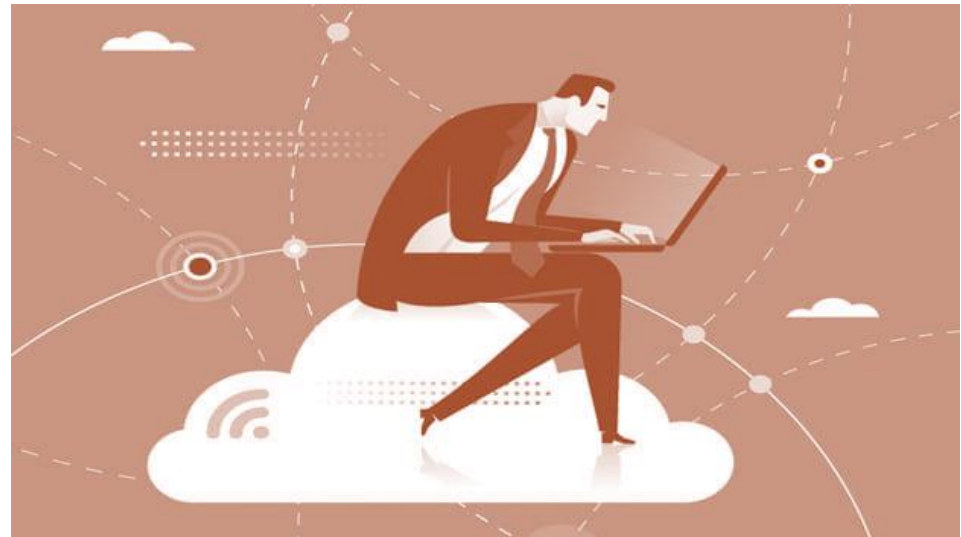


**Help employees help
themselves**



Move from “people management” to “people enablement”

- **Empower people**
 - Provide the tools to allow people to do more themselves.
 - Move from routine task-completion to task-automation
- **People (and companies) are focusing less on careers and more on experiences.**
 - Shift from set job titles and descriptions to skill-based, continuously evolving roles.
 - Empower and support employees in evolving their skills



What employees need to know

- 1) The type of business, industry, and customers served
- 2) The organization's mission, vision, values, and goals
- 3) The organization's goals and roadmap for reaching them
- 4) The values and codes of conduct for and within the organization
- 5) Who comprises the competition and how your organization sets itself apart
- 6) Organizational structure and hierarchy
- 7) Job expectations, roles, and responsibilities
- 8) How success will be measured collectively and individually
- 9) How people are held accountable
- 10) The personalities of the people they work with

Communication strategies to enable others

- **Frequency, length/depth, channel**
 - Sense of urgency
 - Audience
- **“Push” versus “pull”**
- **Share/engage others on goals, objectives, performance measures, roles, responsibilities, and SOPs**



Make use of HR employee support tools

- **Use online self-service portals to conduct a wide range of HR transactions previously conducted via paper transaction**
 - Employee personal data and updates
 - Employee onboarding tasks
 - Benefits enrollment and updates
 - Employee training/e-learning
 - Performance management process entry
 - Time and attendance
 - Access to handbooks, policies, and procedures
- **Incorporate manager self-service (MSS) to also relieve HR of some transactional tasks**
- **Consolidates information creating efficiencies, helps align employees with organizational objectives, enhances consistent communication, and improves productivity improves as employees spend less time looking for the information they need and manually entering data**

Critical components of a productive work week



Work smart

- **Go for quality rather than quantity**
 - **80/20 rule**
- **Implement check lists, calendar reminders, and templates**
- **Don't get sucked in by others' bad habits**
- **Don't let your inbox manage you.**
 - **Schedule a short period of time each day to go through your inbox**
- **Be on time (or even better, early)**
 - **Make use of calendar reminders**
- **Start with the end in mind**
 - **Create micro-goals and deadlines**
- **Schedule time for professional development and guard it judiciously**
- **Build in planning time before meetings**
 - **What want to accomplish, others' potential concerns, questions to ask**
- **Repurpose existing work and resources, when possible, rather than re-inventing the wheel**

Think small

- **Create a Pre-Performance Blueprint: a written statement of your ideal day ahead**
 - Pre-commitment strategies increase your focus and discipline to get things done.
 - You'll have a clear and calibrated script for your day ahead, so it unfolds
- **Work with iteration/oscillation**
 - Structure work cycles that alternate chunks, toggling between those that require intense concentration with those that are more administrative, and include break times to recharge
- **Take time to record and celebrate accomplishments and lessons learned**
 - Share the credit when appropriate

Atomic habits are “little habits that are part of a larger system. Just as atoms are the building blocks of molecules, atomic habits are the building blocks of remarkable results”

-- Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones, by James Clear, 2018, Avery.

Quick hits for success

- Check your planner at the end of every workday to strategize the next day's meetings and tasks.
- Straighten up your office before you leave (the room) for the day.
- Write phone messages in the same place each time, using the same tool.
- Place appointments in your calendar as soon as you make them, along with backed-into preparation dates.
- Confirm appointments in advance.
- Return materials to files immediate after using them.
- Move important emails into pertinent e-folders as soon as you read them.
- Put things by the front door that you will need to take with you in the morning.
- Allow "travel time" in-between meetings.
- Make use of technology to assist you.

Plan & execute effective meetings

✓	Description	Details
Advance Planning	Meeting Purpose	
	Meeting goal(s)	
	Who needs to attend and why	
	Who else should be invited and why	
	What invitees should do in advance	
	What attendees should bring	
	Meeting agenda items	
Meeting Set-up	Meeting location, vehicle, and/or platform	
	Additional meeting tools	
	Email/calendar invite with purpose, agenda, participation expectations, attachments, and directions/log-in info	
	Participation expectations	
	Agenda parsed into time intervals	
	Determination of meeting facilitator, minute taker, and/or time tracker	
	Meeting technology testing	
	Determine collaboration tools	

Meeting Run	Arrive early	
	Start on time	
	Introduce attendees and/or ice breaker	
	Highlight meeting expectations	
	Block other computer applications	
	Take meeting minutes and/or record meeting	
	Close with recap of key conclusions and decisions	
Meeting Follow Up	Identify and agree on ownership of next steps	
	Distribute meeting minutes to attendees and other key stakeholders	
	Post minutes and other reference materials into shared, accessible portal	
	Highlight next meeting date (if applicable)	
	Request meeting feedback (content and format)	
	Reflect on lessons learned	

Meeting Stages

- Advance planning
- Meeting Set up
- Meeting Run
- Meeting Follow up
- Make use of a meeting checklist

Typical types of digital apps to expedite work

- Time/task tracking
- Communication
- Collaboration
- Customer relationship management
- Analytics
- Workflow management
- Social media management
- File/data storage and management
- HR management itself
- Accounting, expense tracking, etc.
- Project management
- Advertising/marketing automation

- **Define the expected tech benefits**
- **Continue to evaluate its value**
- **Establish metrics to monitor its contributions**

Some Sample Apps

- <https://clickup.com/>
- www.Trello.com
- www.Todolist.com
- www.omnifocus.com
- www.bulletjournal.com
- <https://evernote.com/>
- <https://keep.google.com/>
- www.RescueTime.com
- <https://www.forestapp.cc/>
- <https://focuslist.co/>
- <https://productiveapp.io/>
- <https://www.lumentrails.com/>
- <https://slack.com/>
- <https://discord.com/>

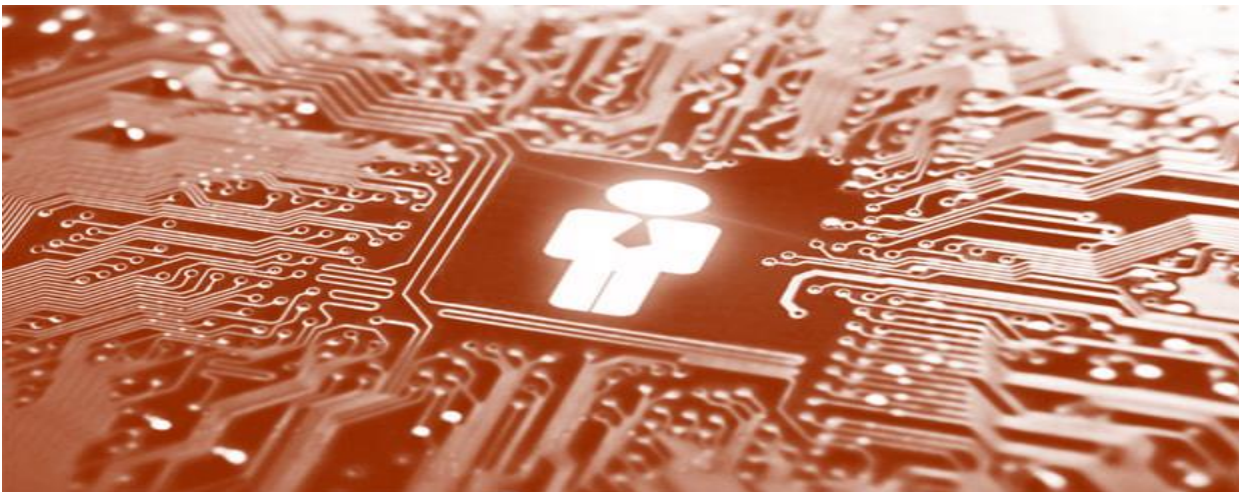
Automate manual HR tasks so you can focus on people



- **Eliminates repetitive internal support processes**
- **Sophisticated, mechanized dashboarding, data analytics, and reporting**
- **Affordable, easy access for all sizes of businesses**
- **Less data entry and better access, sharing, and assessment of data to make better decisions while complying with legal and other requirements**
- **Higher accuracy, efficiency, and visibility of data and information**
- **Can assist in streamlining routine/mass employee communications**
- **Artificial Intelligence (AI), in particular, can help**
 - Involves ways that computers can do things in lieu of human manual effort
 - Facilitates information access
 - Analytics: using tools to analyze raw data and derive useful insights
 - Data mining: technique for looking for hidden patterns and unknown relationships in data
 - Provides workflow and collaboration tools

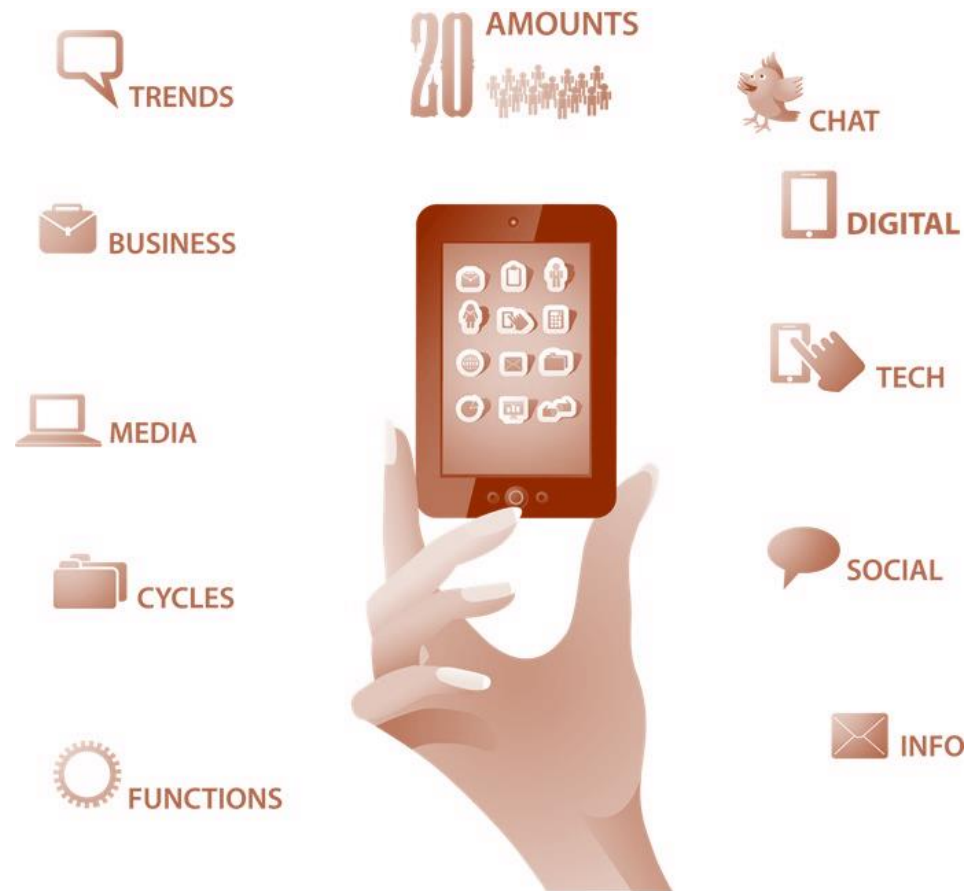
Optimize your tech platform

- **Define the expected benefits of your technology in quantifiable terms and how it can help support your business goals**
- **Continuously evaluate and improve the technology with the objective of continuously streamlining your processes**
- **Establish metrics and systems of measurement to monitor success and performance**
- **Regularly review performance reports and goals to inform your organization's performance dashboard**



Better manage your HR data

- Data storage has a cost and risk
- *Online* file cabinets also save on space
- Cloud computing in HR provides centralization of information.
 - Retrieval any time, anywhere
- Technology facilitates secured, encrypted storage
 - Plus, easy search capabilities
- Facilitates data-analytics



**Nurture and enforce
positive work habits
that also motivate
others**



Be organized & have healthy work habits



- 1- Stop/Start/Continue**
- 2- Urgent/Short-term/Long-term priority lists & time allocation**
- 3- Use a scanner and electronic filing**
- 4- Sync to the cloud**
- 5- Delegate meetings, tasks, and decisions**
- 6-Block off “think” time on your calendar**
- 7- Shut the door or work elsewhere**
- 8- Hide email**
- 9- Have meeting agendas, minutes, and next steps**
- 10- Resist responding right away**

Make use of The “Five Whys” technique

Presenting
issue:

- We need a new copier.

Why 1

- **Why do we need a new copier?** Because the current one keeps jamming.

Why 2

- **Why does the copier keep jamming?** Because the paper keeps getting stuck in the input tray.

Why 3

- **Why does the paper keep getting stuck in the input tray?** Because monthly cleaning maintenance isn't being done.

Why 4

- **Why isn't monthly cleaning maintenance being done?** Because no one called the vendor to come in and do it.

Why 5

- **Why didn't anyone call the vendor to come in and do it?** Because no one was assigned to do it or was keeping track of the time since the last cleaning.

Strive for continuous improvement

- **Understand Key Performance Indicators (KPIs)**

- Derive the right KPIs for your objectives
- Ensure KPIs/dashboard are well-developed, resourced and understood
- Institute a performance-based culture

- **The role of experiments**

- **A.k.a. pilots, “try-its”, prototypes**
- **Advantages:**
 - Don't cost much
 - Low risk
 - Can lead to additional learning or solutions
- **Requirements:**
 - Tolerance of failure without retribution

Some Sample KPIs

- Time to fill positions
- **New employee turnover rates**
- Cost per hire
- **Quality of applicants**
- New hire performance levels
- **Strength of employment brand**
- Referral rates
- **New hire acceptance rates**
- #s, types, amounts, & reasons for bonuses and salary changes
- **Total training cost**
- Number employees trained, and for what
- **Impact of training on performance, retention, and progression, as well as on customers and others**
- Performance ratings
- **Attrition rates**
- Exit interview results

Additional resources

- The 5 AM Club: Own Your Morning, Elevate Your Life, by Robin Sharma, 2018, HarperCollins.
- Practice Perfect: 42 Rules for Getting Better at Getting Better, by Doug Lemov, 2012, Jossey-Bass.
- Organizing Your Day: Time Management Techniques That Will Work For You, by Sandra Felton and Marsha Sims, 2009, Revell.
- Great at Work: How Top Performers Do Less, Work Better, and Achieve More, by Morten T. Hansen, 2018, Simon & Schuster.
- This Year I Will... How to finally change a habit, keep a resolution, or make a dream come true, by M.J. Ryan, Broadway Books, 2006.
- High Performance Habits: How Extraordinary People Become That Way, by Brendon Burchard, 2017, Hay House, Inc
- Atomic Habits: An Easy & Proven Way to Build Good Habits & Break Bad Ones, by James Clear, 2018, Avery.
- Design for How People Learn, Second Edition, by Julie Dirksen, 2016.

Stay current on best practices

- **Benchmarking**
 - Compares an organization's practices, processes, and results against others
- **Stay connected**
 - Industry events and conferences
 - Networking groups
 - Individual contacts at other companies both within and outside your industry
- **Follow established HR organizations' guidance, such as:**
 - Hrmorning.com
 - SHRM (Society of Human Resources Managers)
 - HCI (Human Capital Institute)
 - IHRIM (International Association for Human Resource Information Management)
- **Decide what to handle in-house and what to outsource**
 - Stay current on vendors and options



Let's stay in touch!

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complimentary copy
of my latest monthly
newsletter!*



Thank You for Your Participation