

Prepare for Success

Purpose:

The purpose of this “shopping list” is to help those responsible for acquiring HR Outsourced support to be successful. Too often individuals tasked with acquiring HR support start searching for solutions without a shopping list of what should be expected to meet their organization's needs. This can be painful, frustrating, and result in expensive lessons for the organization and the individual that made the recommendation.

Start by Building Clarity:

Taking a few minutes to build a list of expectations needed to meet your organization's goals will prepare you to be a demanding consumer of HR services. In addition, it will help unify the expectations within our organization before the vetting process begins.

Build Your HR Shopping List:

What follows are a list of demanding expectations that an employer may have of Human Resources. We recommend that you make this list your own through edits, deletions, and additions. Your list should be demanding and those tasked with meeting your expectations should be able to prove they can deliver.



Risk Management

Compliance Design & Maintenance Standards	Expected	Desired	Nice, but not Priority	Marginal Value	Known Strength
Human Resources is responsible for identifying the variables the generate risk for employers. They are expected to design solutions that proactively control those risks consistently.					
Court decisions, regulatory changes, and how business operate constantly change. Human Resources is expected to have a systematic method for reevaluating policies, processes, and systems responsible for managing employer risk.					

Key Personnel Risk Management Education	Expected	Desired	Nice, but not Priority	Marginal Value	Known Strength
The actions or lack of actions by managers has substantive impact on employer risk. It is the responsibility of Human Resources to keep the management team educated on current employer risks. Human resources is expected to train key employees on policies associated with their position, the importance of the policy, and their role in controlling associated risks.					



Implementation and Execution	Expected	Desired	Nice, but not Priority	Marginal Value	Known Strength
<p>Effectively mitigating risks commonly requires more than a new policy. Changes to standard operating processes, forms, and how decisions are made is common. Human Resources is expected to use quality implementation and adoption processes to achieve true change that effectively mitigate risks.</p>					
<p>Implementation of any Human Resource solutions must be proactively planned, be transparent and are expected to provide efficient means of tracking their progress.</p>					

Systematic Management of Risk Variables	Expected	Desired	Nice, but not Priority	Marginal Value	Known Strength
<p>HR should have structured processes supported by automation to manage the ever-changing risks that vary by position, by geographic area, and by compensation plan.</p>					
<p>Employers commonly have more than 100 policies, forms, pay plans, job descriptions, and other documents designed to control risk. HR is expected to track last review date, next recommended review dates, and status of those being updated that can be audited on demand.</p>					



Professional Compliance Support	Expected	Desired	Nice, but not Priority	Marginal Value	Known Strength
Human Resources is expected to understand the business operating needs of the organization and integrate business needs into compliance consultations and solutions.					
Effective HR partners develop judgement free relationships with managers to encourage candor, allow for manager mentoring, and learn about potential risks early.					

Employee Performance

Performance Infrastructure Design	Expected	Desired	Nice, but not Priority	Marginal Value	Known Strength
Human Resources is responsible for weaving performance expectations into every aspect of the employment process. Clearly defined performance expectations go beyond defining what is to be done, but include details on expected quality, consistency, importance, and level of responsibility.					
Each position has key responsibilities that must be met for the employee to be successful. Clarifying and then documenting these expectations allows managers to develop employees faster and to compare expectations to current performance. It is the job of Human Resources to work with management to build and maintain these impactful definitions of success.					



Management Skill Development	Expected	Desired	Nice, but not Priority	Marginal Value	Known Strength
Employee engagement is a measure of how much effort an employee gives beyond what is required to keep their position. Human Resources is expected to help develop managerial skills so managers can optimize employee engagement.					
Developing management skills requires observing managerial activities and giving feedback. This is critical to develop quality managers, difficult for most management teams, and Human Resources is expected to bring effective solutions.					

Performance Management Administration	Expected	Desired	Nice, but not Priority	Marginal Value	Known Strength
The Performance Management process provided by Human Resources must support consistency and mitigate fluctuating performance levels associated with reactionary management processes. HR is expected to support the consistent execution of the performance management model.					



Performance Management Systems	Expected	Desired	Nice, but not Priority	Marginal Value	Known Strength
Performance Management Systems should help managers capture day to day performance detail efficiently; help managers identify performance trends timely; and maximize the opportunity for changing employee behavior successfully.					
Reviewing employee performance and providing timely feedback that is effective optimizes employee contributions. HR should provide systems that help managers record feedback details, schedule next review timing, and track performance levels.					
HR should provide systems that allow senior management to review the quality and timeliness of manager coaching sessions with direct reports and manager's documentation of employee wins and opportunities to improve.					

Professional Support for Managers	Expected	Desired	Nice, but not Priority	Marginal Value	Known Strength
Human Resources is expected to help managers identify the root cause of an employee issue, advise managers on how to handle the issue at hand, and how to prevent them in the future.					
Formal performance warnings and terminations require accurate wording to avoid the appearance of discrimination and/or retaliation in many cases. HR should produce these documents in collaboration with managers to control risks.					



Aligning the Workload

HR Administration	Expected	Desired	Nice, but not Priority	Marginal Value	Known Strength
<p>Day to Day HR administration builds a historical record of compliance; or not. HR is expected to have skilled employees administering HR duties that impact FLSA, ADA, ACA, EEOC, ERISA, Title IX, and other regulations. These employees are expected to identify potential risks and take action.</p>					
<p>HR is expected to control operating costs by having appropriately skilled employees performing the right work and at a fair cost. HR is expected to utilize automation to build efficiency, increase quality, and reduce overhead.</p>					
Managerial HR Administration Burden	Expected	Desired	Nice, but not Priority	Marginal Value	Known Strength
<p>It is the job of Human Resources to bring tools and support that ensures key administrative duties are performed consistently, professionally, and minimize the demands on the management team.</p>					



Workplace Safety	Expected	Desired	Nice, but not Priority	Marginal Value	Known Strength
Human Resources is expected to bring programs and support that meet OSHA standards and minimize employee injuries. HR must provide safety officer training, employee training, drug free workplace policies, drug testing programs, and medical clinics for treating injuries in an integrated solution.					
Workers' Compensation costs can have a major impact on a P&L and are controllable. HR is expected to have a proactive plan, professionally administered, that has been proven to control these costs.					

HR Role in Employer Claims Management	Expected	Desired	Nice, but not Priority	Marginal Value	Known Strength
Employee litigation is a reality. Human Resources is expected to take a leadership role in building strategic defenses for employers or actively supporting legal counsel where appropriate. Quality HR consultation requires HR professionals that are experienced in defending current litigation trends.					



Payroll Administration	Expected	Desired	Nice, but not Priority	Marginal Value	Known Strength
Payroll and HCM platforms rarely get fully implemented due to lack of knowledge and experience. HR is expected provide the technical skills and business process experience to design and implement effective solutions that meet the demands of the organization.					
HR is expected to bring a Payroll and HCM solution to meet today's needs and years into the future. For example: time tracking, scheduling, benefit administration, and recruitment.					
ERISA compliance reporting, labor cost allocation, P&L integration, EEOC reporting, fringe rate computations, must all be considered in advance of implementation. HR is expected to design payroll database configuration to bring powerful analytics and avoid predictable future frustrations.					

