YOUR HR STRATEGY CHECKLIST

How to plan your HR strategy

Want to get HR a seat at the table? You need to be strategic. Set aside time to plan out your biggest goals for the year. This way, you can hit the ground running with all the facts, figures, and strategy you need to succeed.

Here's a checklist to help you structure your strategic HR plan. You'll need to block out some time to do this effectively, so make sure you allow yourself a few focused hours.

Ask questions

Get specific

Do research

Plan initiatives

Check stakeholders

Measure and analyze

1. Ask the relevant questions

This first step is when you'll define your priorities for creating an effective strategy that helps you reach your goals.

☐ What are the business's main challenges and priorities for the year and what 3-4 things can HR do to solve them?

☐ What's your budget?

☐ What time frame are you working within?

☐ Who will be your biggest advocates and possible detractors in implementing these goals?

☐ Which stakeholders will you need to bring on board to achieve them?

☐ How will you build on past successes and learn from its failures?

2. Get specific

Build a thorough overview of the organization's challenges, opportunities, and capability gaps in order to make a plan for how to overcome them during the year. Ask yourself:

- [ ] What capabilities in the business need to be strengthened?

- [ ] Will these capabilities be improved through development or by buying in talent?

- [ ] How does culture impact your HR goals?

- [ ] What elements of your culture require bolstering?

- [ ] What tools, programs, comms and strategies will be required to engage the organization at every level?

- [ ] Gather as many facts and figures as you can, getting specific about teams, job roles and territories

3. Do research

It's also important to consider the world beyond your organization, including trends and factors to take into account when considering your strategic plan. This will involve some research via third party organisations such as government, independent research bodies, and consultancies. Look for:

☐ Any new legal requirements or regulations to consider

☐ Demographic trends in your territories

☐ Social and technological changes in the short- and mid-term

☐ Political movements within your business footprint

☐ Salary expectations for business-critical roles

☐ HR trends

4. Plan your initiatives

Based on your priorities and the micro and macro trends, it's now time to start planning what strategies, projects, and initiatives you'll put into place to achieve your goals for the year:

☐ What hiring strategies, development, pipelining, training, and compensation will be required to achieve your goals?

☐ What external and internal resources will be required to implement your strategies and projects?

☐ What is the anticipated budget requirement?

5. Check in with your stakeholders

Often you'll need buy-in from different parts of the organization to achieve your goals. This means to represent to the C-suite what your team's contributions will be to achieving business goals.

☐ Plan how you will communicate your goals and initiatives to the business

☐ Choose which statistics you'll present to business leaders and how to make them most impactful

☐ Identify accountabilities and responsibilities

☐ Consider what elements will be transparent to the whole

☐ Organization and what will be behind the scenes
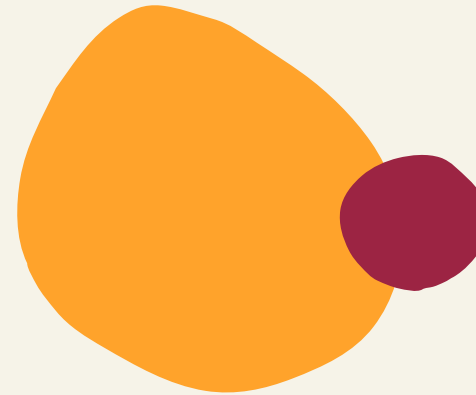
6. Measure and analyze

HR strategies live and die by their data and analytics, so it's important to rigorously plan out how you intend to capture, measure and analyze the effectiveness of your strategies in order to report back to stakeholders.

It could be useful to compare this data to any external data you can find from other organizations, for example via case studies. Measurement metrics can be collected through the following steps:

☐ Identifying and measuring KPIs

☐ Determining the different kinds of data that will need to be gathered, such as qualitative, quantitative, and self-reported from employees and team leaders".

☐ Establishing how your statistics will be measured. What software or platforms will you gather, measure, and compare it with?

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