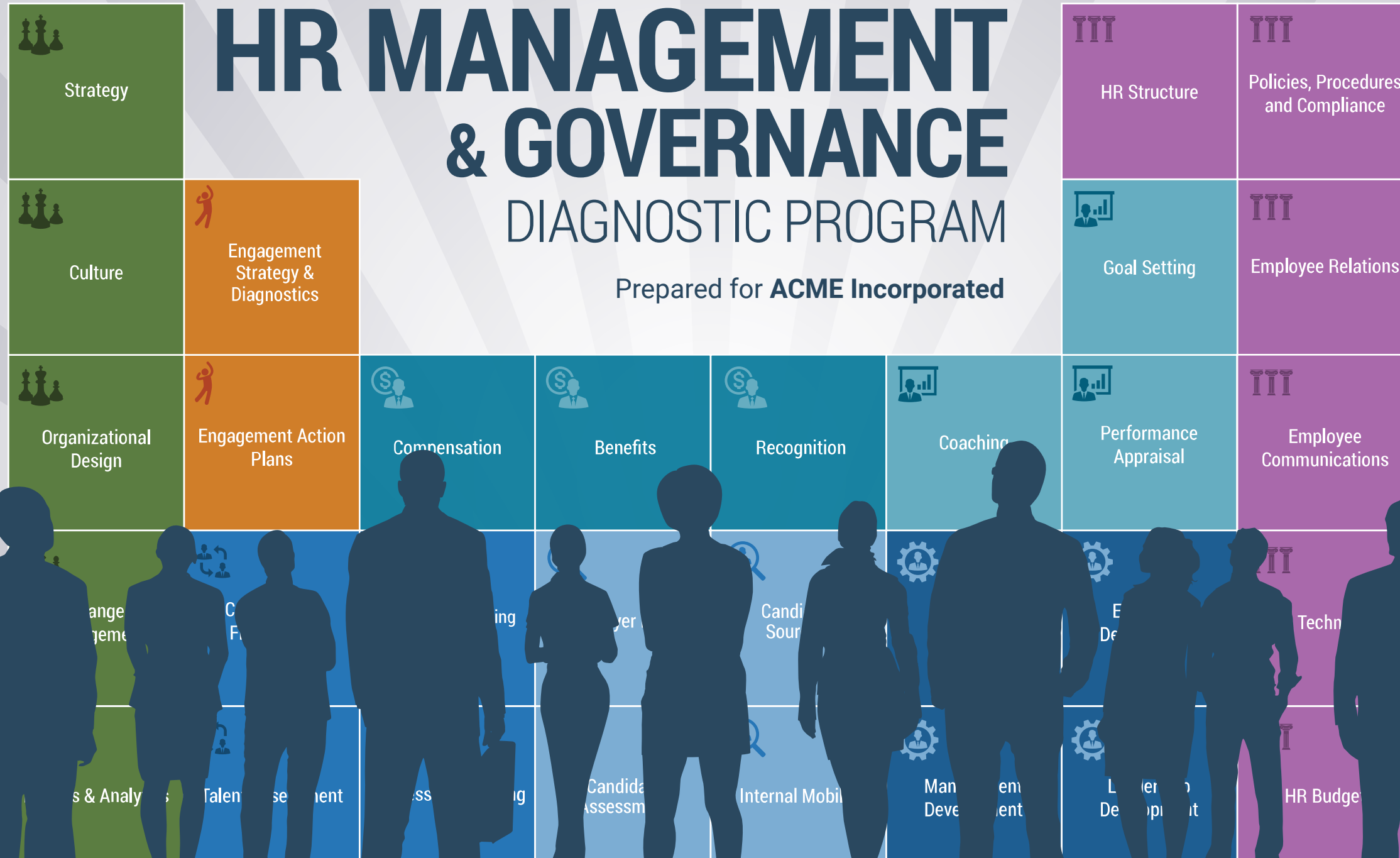


HR MANAGEMENT & GOVERNANCE

DIAGNOSTIC PROGRAM

Prepared for **ACME Incorporated**



This report was prepared by McLean & Company for ACME Incorporated on 2015-06-18. Data is comprised of 8 responses.



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1. Understand Results

- Get a clear understanding of the areas that affect your HR department's ability to fulfill HR and business goals.
- Understand your team's perception of each area's importance and effectiveness.
- Identify where the gaps exist between your team members' area scores to see where there are differences in opinion.
- This step should be complete by the end of your first results analyst call

2. Establish Clear Accountabilities & Responsibilities For Key Areas

- Build a plan to ensure clear accountability
- Ensure Key HR Leaders are not overwhelmed with accountability
- Create a plan to engage a broader team with area accountability

3. Book & Conduct A Team Alignment Exercise

- Gather your team and discuss the discrepancies for the areas with the greatest gaps in scores.
- Bring the entire team onto the same page regarding which areas are the most important and which areas are the least effective.
- Establish area owners for each HR area. Each relevant area must have at least one person accountable for monitoring and improvement initiatives.

4. Create A Roadmap Of Key Areas To Improve

- Once your team has reached a consensus on which areas to focus on, create an area improvement roadmap outlining which areas your team will focus on over the next 12 months.
- Determine concrete responsibilities and timelines, as well as regular checkpoints with your team to monitor progress.

HR Strategy

Strategy
Culture
Organizational Design
Change Management
Metrics & Analytics

Employee Engagement

Engagement Strategy & Diagnostics
Engagement Action Plans
Competency Framework
Talent Assessment

HR Management & Governance Framework

This diagnostic program was developed using McLean & Company's HR framework. The current page is a snapshot of the landscape within your HR department. The areas have been color coded based on your team's importance and effectiveness scores for each HR area. Use this page to help you prioritize your HR area improvement initiatives.

Improve Area	High Importance and Low Effectiveness	Evaluate Area	Low Importance and Low Effectiveness
Maintain Area	Low Importance and High Effectiveness	Leverage Area	High Importance and High Effectiveness

Total Compensation

Compensation	Benefits	Recognition
Workforce Planning	Employer Brand	Candidate Sourcing
Succession Planning	Candidate Assessment	Internal Mobility

Performance Management

Coaching	Performance Appraisal	Employee Communications
Onboarding	Employee Development	HR Technology
Management Development	Leadership Development	HR Budget

HR Operations & Infrastructure

HR Structure	Policies, Procedures and Compliance
Goal Setting	Employee Relations

Talent Management

Talent Acquisition

Learning & Development

No Importance 0.0 - 6.0	Limited Importance 6.1 - 8.0	Moderate Importance 8.1 - 9.0	Critical Importance 9.1 - 10
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These are all of your HR areas ranked based on their perceived importance, from the most important to the least important. Use this data to understand which areas your team believes are crucial to them and to the organization.

Critical Importance										
Moderate Importance	Leadership Development	8.9	Employer Brand	8.8	Management Development	8.6	Candidate Sourcing	8.4	Employee Development	8.4
	Culture	8.3	Strategy	8.1	Recognition	8.1				
Limited Importance	Employee Relations	8	Succession Planning	7.9	Employee Communications	7.8	Candidate Assessment	7.8	Goal Setting	7.6
	Onboarding	7.5	Engagement Action Plans	7.5	Workforce Planning	7.4	Coaching	7.3	Change Management	7.3
	Compensation	7.3	Competency Framework	7.1	Metrics & Analytics	7	Engagement Strategy & Diagnostics	6.9	Benefits	6.9
	Internal Mobility	6.9	Organizational Design	6.8	HR Technology	6.8	Performance Appraisal	6.6	Talent Assessment	6.6
	Policies, Procedures and Compliance	6.1								
No Importance	HR Budget	5.9	HR Structure	5.8						

Top 10 Areas of Disagreement

The following areas have the largest deviation in scores from the average.

2.0	Workforce Planning	
1.92	HR Structure	
1.9	Engagement Strategy & Diagnostics	
1.83	Recognition	
1.8	Performance Appraisal	
1.79	Compensation	
1.79	Employee Communications	
1.76	HR Budget	
1.73	Engagement Action Plans	
1.69	Policies, Procedures and Compliance	

Not in Place N/A	Not Effective 0.0 - 6.0	Somewhat Ineffective 6.1 - 7.0	Somewhat Effective 7.1 - 8.0	Very Effective 8.1 - 10.0
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This page shows all your HR areas in order of their perceived effectiveness, from least effective to most effective. Use this data to understand which areas your team believes are currently performing well and which areas are currently struggling or broken.

Not In Place					
Not Effective					
Somewhat Ineffective	HR Budget 6.1	Engagement Action Plans 6.4	Metrics & Analytics 6.4	Recognition 6.4	Succession Planning 6.4
	Strategy 6.5	Goal Setting 6.8	HR Technology 6.9	Talent Assessment 7	Coaching 7
	Candidate Assessment 7				
Somewhat Effective	Employee Relations 7.4	Performance Appraisal 7.4	Change Management 7.4	Leadership Development 7.4	HR Structure 7.5
	Workforce Planning 7.5	Employer Brand 7.5	Employee Development 7.5	Organizational Design 7.5	Culture 7.5
	Internal Mobility 7.6	Policies, Procedures and Compliance 7.6	Engagement Strategy & Diagnostics 7.6	Onboarding 7.6	Benefits 7.8
	Competency Framework 7.8	Management Development 7.9	Compensation 8		
Very Effective	Candidate Sourcing 8.1	Employee Communications 8.3			



Top 10 Areas of Disagreement

The following areas have the largest deviation in scores from the average.

2.87	Recognition	
2.44	Goal Setting	
2.39	Metrics & Analytics	
2.24	Strategy	
2.12	Employer Brand	
2.06	Engagement Action Plans	
2.03	HR Budget	
2.03	HR Technology	
2.0	Employee Relations	
2.0	Succession Planning	



This page outlines the current area accountabilities for each HR area. These individuals have indicated that they are accountable for all of the areas that sit next to their names. Pay particular attention to areas which have more than one individual accountable, as well as areas that have nobody held accountable for them. Determine whether the current accountability distribution makes sense, and which areas need more or less attention.

Name ⚠️ If a person has been identified as accountable for three areas or more, a warning sign will show up. Being accountable for too many areas can result in insufficient attention being paid to each individual process.

Missing Accountability	Compensation	Benefits	Recognition	HR Technology				
Kimberly Johnson ⚠️	Strategy	Culture	Organizational Design	Change Management	Metrics & Analytics	Engagement Strategy & Diagnostics	Engagement Action Plans	
	HR Structure	Policies, Procedures and Compliance	HR Budget					
Jason Brown ⚠️	Goal Setting	Performance Appraisal	Coaching	Onboarding	Employee Development	Management Development	Leadership Development	
	Employee Relations	Employee Communications						
Melissa Brown ⚠️	Competency Framework	Workforce Planning	Talent Assessment	Succession Planning	Employer Brand	Candidate Sourcing	Candidate Assessment	
	Internal Mobility							
Mark Clark ⚠️	Coaching	Onboarding	Employee Development	Management Development	Leadership Development			
Amy Lewis								
Nicole Miller								
James Johnson								
Karen Moore								

How to read this page?

Accountable Only : I am the owner of this area and I am accountable for the results & outcomes. I have assigned someone else primary responsibility for execution and day to day activities.

Accountable & Responsible : I am the owner of this area and I am accountable for the results & outcomes. I am primarily responsible for execution and day to day activities of this area.

Responsible : I am responsible for the execution and oversight of the activities involved with this area. I manage the area maturity and I'm responsible to report on results from this area.

Consulted & Involved : I am actively involved with this area and consulted on decisions.

Involved & Informed : I am actively involved with this area and told about decisions surrounding this area.

Not involved : I am not actively involved in this area or the decisions surrounding this area.



Accountable Only	Accountable & Responsible	Responsible Only	Involved: Consulted	Involved: Informed	Not Involved	Accountability Conflict	Accountability & Responsibility Conflict	Responsibility Conflict
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Kimberly Johnson	Change Management	Engagement Action Plans	Engagement Strategy & Diagnostics	Metrics & Analytics	Culture	HR Budget	HR Structure
	Organizational Design	Policies, Procedures and Compliance	Strategy	Benefits	Candidate Assessment	Candidate Sourcing	Coaching
	Compensation	Competency Framework	Employee Communications	Employee Development	Employee Relations	Employer Brand	Goal Setting
	HR Technology	Internal Mobility	Leadership Development	Management Development	Onboarding	Performance Appraisal	Recognition
	Succession Planning	Talent Assessment	Workforce Planning				

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Melissa Brown	Candidate Assessment	Candidate Sourcing	Employer Brand	Internal Mobility	Competency Framework	Succession Planning	Talent Assessment
	Workforce Planning	Change Management	Coaching	Culture	Employee Communications	Employee Development	Employee Relations
	Engagement Action Plans	Engagement Strategy & Diagnostics	Goal Setting	HR Budget	Leadership Development	Management Development	Metrics & Analytics
	Onboarding	Organizational Design	Performance Appraisal	Strategy	Benefits	Compensation	HR Structure
	HR Technology	Policies, Procedures and Compliance	Recognition				

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Mark Clark	Employee Development	Coaching	Leadership Development	Management Development	Onboarding	Competency Framework	Culture
	Goal Setting	HR Budget	HR Technology	Internal Mobility	Strategy	Succession Planning	Talent Assessment
	Workforce Planning	Change Management	Employee Communications	Employee Relations	Engagement Action Plans	Engagement Strategy & Diagnostics	HR Structure
	Metrics & Analytics	Organizational Design	Performance Appraisal	Policies, Procedures and Compliance	Benefits	Candidate Assessment	Candidate Sourcing
	Compensation	Employer Brand	Recognition				

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Jason Brown	Employee Development	Leadership Development	Management Development	Onboarding	Coaching	Employee Communications	Employee Relations
	Goal Setting	Performance Appraisal	Change Management	Competency Framework	Culture	Employer Brand	Engagement Action Plans
	Engagement Strategy & Diagnostics	HR Budget	Internal Mobility	Organizational Design	Policies, Procedures and Compliance	Recognition	Succession Planning
	Talent Assessment	Workforce Planning	Candidate Assessment	Candidate Sourcing	HR Structure	HR Technology	Metrics & Analytics
	Strategy	Benefits	Compensation				

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Amy Lewis	Candidate Assessment	Candidate Sourcing	Employer Brand	Internal Mobility	Benefits	Change Management	Compensation
	Competency Framework	Culture	HR Budget	HR Structure	HR Technology	Metrics & Analytics	Onboarding
	Organizational Design	Strategy	Succession Planning	Talent Assessment	Workforce Planning	Coaching	Employee Communications
	Employee Development	Employee Relations	Engagement Action Plans	Engagement Strategy & Diagnostics	Goal Setting	Leadership Development	Management Development
	Performance Appraisal	Policies, Procedures and Compliance	Recognition				

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Nicole Miller	Employee Development	Leadership Development	Management Development	Candidate Assessment	Change Management	Coaching	Competency Framework
	Culture	Goal Setting	HR Budget	HR Structure	HR Technology	Metrics & Analytics	Onboarding
	Organizational Design	Performance Appraisal	Policies, Procedures and Compliance	Strategy	Succession Planning	Talent Assessment	Workforce Planning
	Benefits	Candidate Sourcing	Compensation	Employee Communications	Employee Relations	Employer Brand	Engagement Action Plans
	Engagement Strategy & Diagnostics	Internal Mobility	Recognition				

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James Johnson	Benefits	Compensation	HR Technology	Candidate Sourcing	Change Management	Culture	HR Budget
	HR Structure	Internal Mobility	Metrics & Analytics	Organizational Design	Performance Appraisal	Policies, Procedures and Compliance	Recognition
	Strategy	Candidate Assessment	Coaching	Competency Framework	Employee Communications	Employee Development	Employee Relations
	Employer Brand	Engagement Action Plans	Engagement Strategy & Diagnostics	Goal Setting	Leadership Development	Management Development	Onboarding
	Succession Planning	Talent Assessment	Workforce Planning				

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Karen Moore	Coaching	Employee Communications	Employee Relations	Goal Setting	Performance Appraisal	Policies, Procedures and Compliance	Succession Planning
	Talent Assessment	Internal Mobility	Benefits	Change Management	Compensation	Competency Framework	Culture
	Employee Development	Engagement Action Plans	Engagement Strategy & Diagnostics	HR Budget	HR Structure	HR Technology	Leadership Development
	Management Development	Metrics & Analytics	Onboarding	Organizational Design	Recognition	Strategy	Workforce Planning
	Candidate Assessment	Candidate Sourcing	Employer Brand				

Use this grid to prioritize your team's area improvement initiatives. The top areas in each quadrant have been listed in this grid. Please use the following page as reference for any quadrants with additional areas. Focus your time and energy on the areas in the top left quadrant first, which received high importance scores but low effectiveness scores.



TEAM ALIGNMENT EXERCISE

Use the data from this report to get your team to commit to HR area improvement.

The following pages will provide you with a deeper insight into what the program participants believe should be your top HR area priorities. Use the data from this section of the report to conduct an alignment exercise to reach a consensus around 3-5 areas that your team should focus on improving over the next 12 months. Pay particular attention to the areas of disagreement, and bridge the gap between yourself as an HR leader, and your team. As a part of this exercise, take the time to review area accountabilities and delegate or distribute the accountabilities to other team members in order to maximize the likelihood of success and to improve transparency and clarity.



HR Management & Governance Diagnostics Program

This report was prepared by McLean & Company for ACME Incorporated on 2015-06-18.
Data is comprised of 8 responses.

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HR Strategy

<p>Strategy</p> <p>R K. Johnson A K. Johnson</p>
<p>Culture</p> <p>R K. Johnson A K. Johnson</p>
<p>Organizational Design</p> <p>R K. Johnson A K. Johnson</p>
<p>Change Management</p> <p>R -- missing -- A K. Johnson</p>
<p>Metrics & Analytics</p> <p>R -- missing -- A K. Johnson</p>

Employee Engagement

<p>Engagement Strategy & Diagnostics</p> <p>R -- missing -- A K. Johnson</p>
<p>Engagement Action Plans</p> <p>R -- missing -- A K. Johnson</p>

HR Area Accountability and Responsibility

Within the framework, the names of the individuals who are accountable and responsible for each HR area are displayed. Any areas without an accountable or responsible individual will be shown as "~missing~"

A Accountable
R Responsible

Total Compensation

<p>Compensation</p> <p>R James Johnson A -- missing --</p>	<p>Benefits</p> <p>R James Johnson A -- missing --</p>	<p>Recognition</p> <p>R -- missing -- A -- missing --</p>
<p>Workforce Planning</p> <p>R Melissa Brown A Melissa Brown</p>	<p>Employer Brand</p> <p>R Amy Lewis A Melissa Brown</p>	<p>Candidate Sourcing</p> <p>R Amy Lewis A Melissa Brown</p>
<p>Succession Planning</p> <p>R Melissa Brown A Melissa Brown</p>	<p>Candidate Assessment</p> <p>R Amy Lewis A Melissa Brown</p>	<p>Internal Mobility</p> <p>R Amy Lewis A Melissa Brown</p>

Performance Management

<p>HR Structure</p> <p>R K. Johnson A K. Johnson</p>	<p>Policies, Procedures and Compliance</p> <p>R K. Johnson A K. Johnson</p>
<p>Goal Setting</p> <p>R Jason Brown A Jason Brown</p>	<p>Employee Relations</p> <p>R Jason Brown A Jason Brown</p>
<p>Performance Appraisal</p> <p>R Jason Brown A Jason Brown</p>	<p>Employee Communications</p> <p>R Jason Brown A Jason Brown</p>
<p>Onboarding</p> <p>R Mark Clark A Mark Clark</p>	<p>Employee Development</p> <p>R Nicole Miller A Mark Clark</p>
<p>Management Development</p> <p>R Mark Clark A Mark Clark</p>	<p>Leadership Development</p> <p>R Mark Clark A Mark Clark</p>
	<p>HR Technology</p> <p>R -- missing -- A -- missing --</p>
	<p>HR Budget</p> <p>R K. Johnson A K. Johnson</p>

Talent Management

Talent Acquisition

Learning & Development

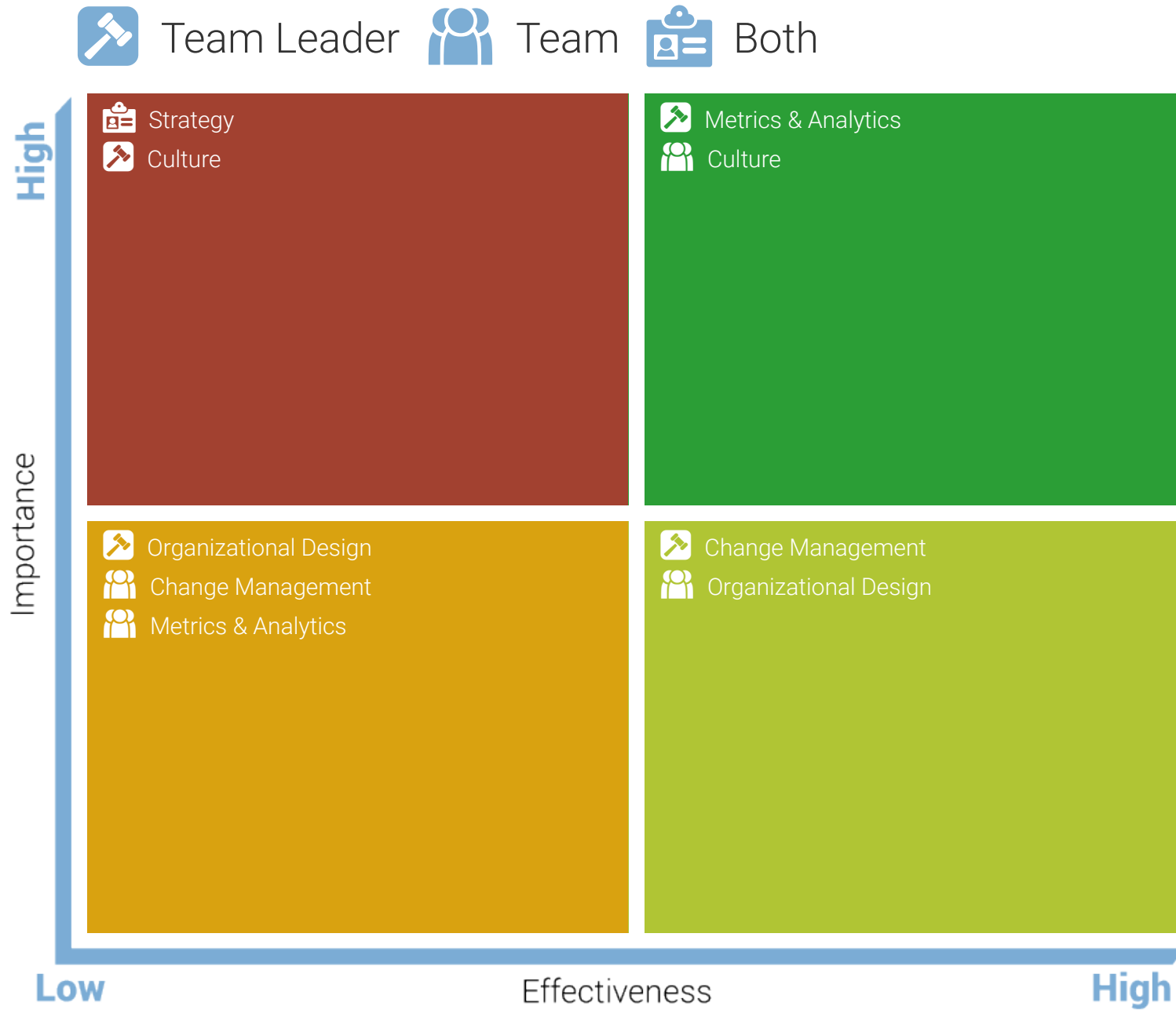


The HR leader must focus on improving the areas in the top left quadrant first in order to see the biggest impact.



Area Prioritization Grid

This prioritization grid reflects the opinions of the team leader and the team regarding area importance and effectiveness. The placement of each area within the grid corresponds to a call to action. Use this grid to discuss differences in opinions and to reach a consensus before creating an area improvement plan.



	Improve Area		Leverage Area
	Evaluate Area		Maintain Area

HR Strategy Overall Results


Use the average scores for all of the areas in this function to get an understanding of how this function scored. The team leader and the team's responses are separated to give an indication of the perceived importance and effectiveness for this function. The rankings indicate how this function performed against the others. Prioritize this function if it has a high importance, but a low effectiveness ranking.


Team Leader		Team
7.6	Importance Score	7.46
7.2	Effectiveness Score	7.03
5	Importance Rank (out of 7)	3
6	Effectiveness Rank (out of 7)	7


Area Accountabilities

The following respondents have identified themselves as being accountable over these areas.

Strategy	Kimberly Johnson
Culture	Kimberly Johnson
Organizational Design	Kimberly Johnson
Change Management	Kimberly Johnson
Metrics & Analytics	Kimberly Johnson

 Culture	The act of shaping and sustaining the shared attitudes, beliefs, customs, and rules of an organization. Culture can be demonstrated in many ways, including how the organization treats its employees, customers, and the wider community.
6th	Most Important Area (out of 31)
16th	Most Effective Area (out of 31)
8.3	Average Importance score
7.5	Average Effectiveness score

 Strategy	The process of linking HR management directly to the strategic plan of your organization. Human resources planning identifies current and future human resources needs. This, in turn, supports an organization in achieving its goals.
7th	Most Important Area (out of 31)
26th	Most Effective Area (out of 31)
8.1	Average Importance score
6.5	Average Effectiveness score

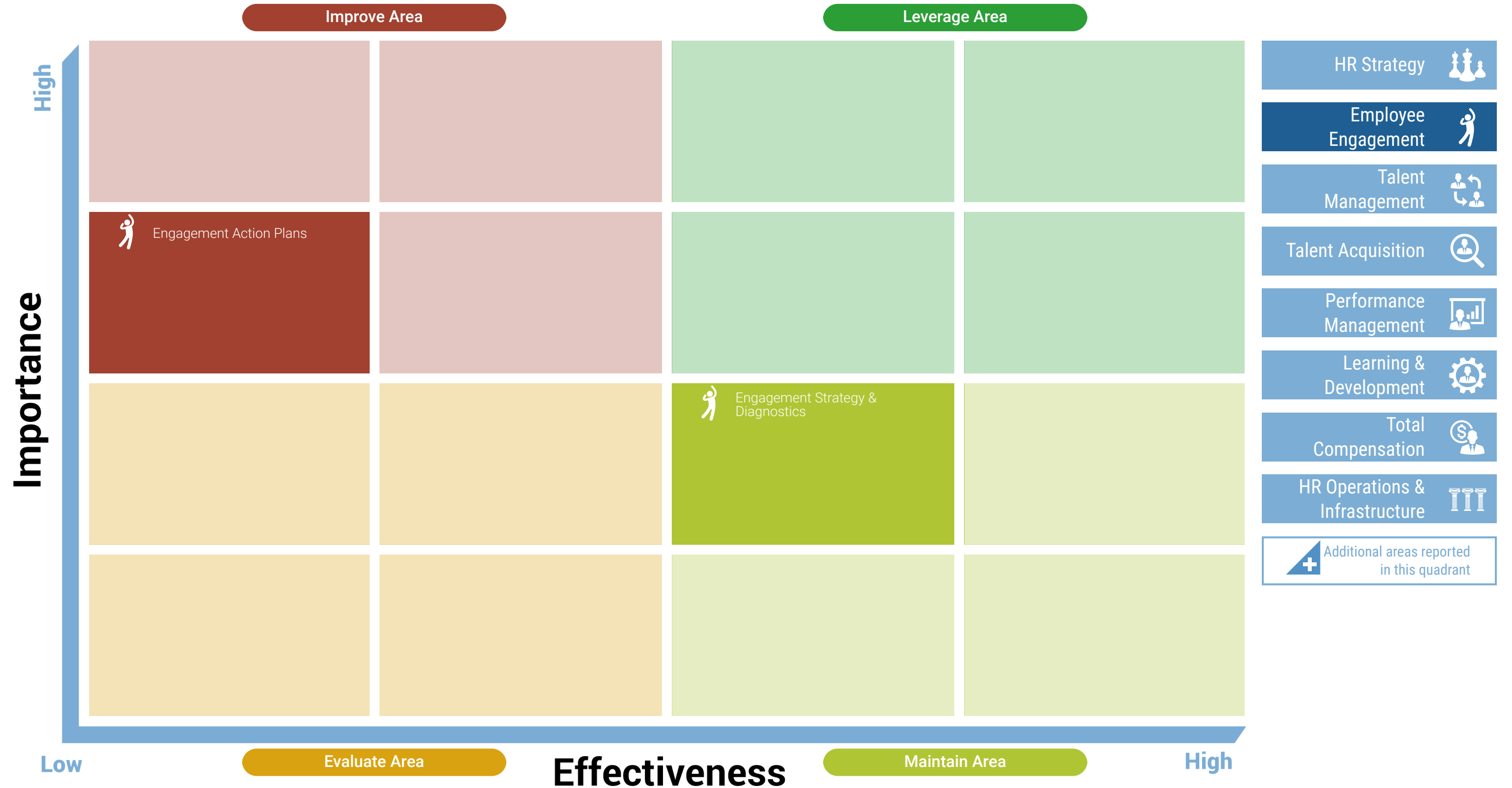
 Change Management	The use of a structured process and set of tools to lead the people side of change and achieve a desired outcome.
19th	Most Important Area (out of 31)
20th	Most Effective Area (out of 31)
7.3	Average Importance score
7.4	Average Effectiveness score

 Metrics & Analytics	The effective use of workforce data to maximize retention, engagement, and productivity. Benchmarking and analytics help HR leaders make better workforce decisions to drive business performance.
21st	Most Important Area (out of 31)
29th	Most Effective Area (out of 31)
7.0	Average Importance score
6.4	Average Effectiveness score

 Organizational Design	The deliberate process of configuring structures, processes, reward systems, and people practices to create an effective organization capable of achieving the business strategy.
25th	Most Important Area (out of 31)
12th	Most Effective Area (out of 31)
6.8	Average Importance score
7.5	Average Effectiveness score



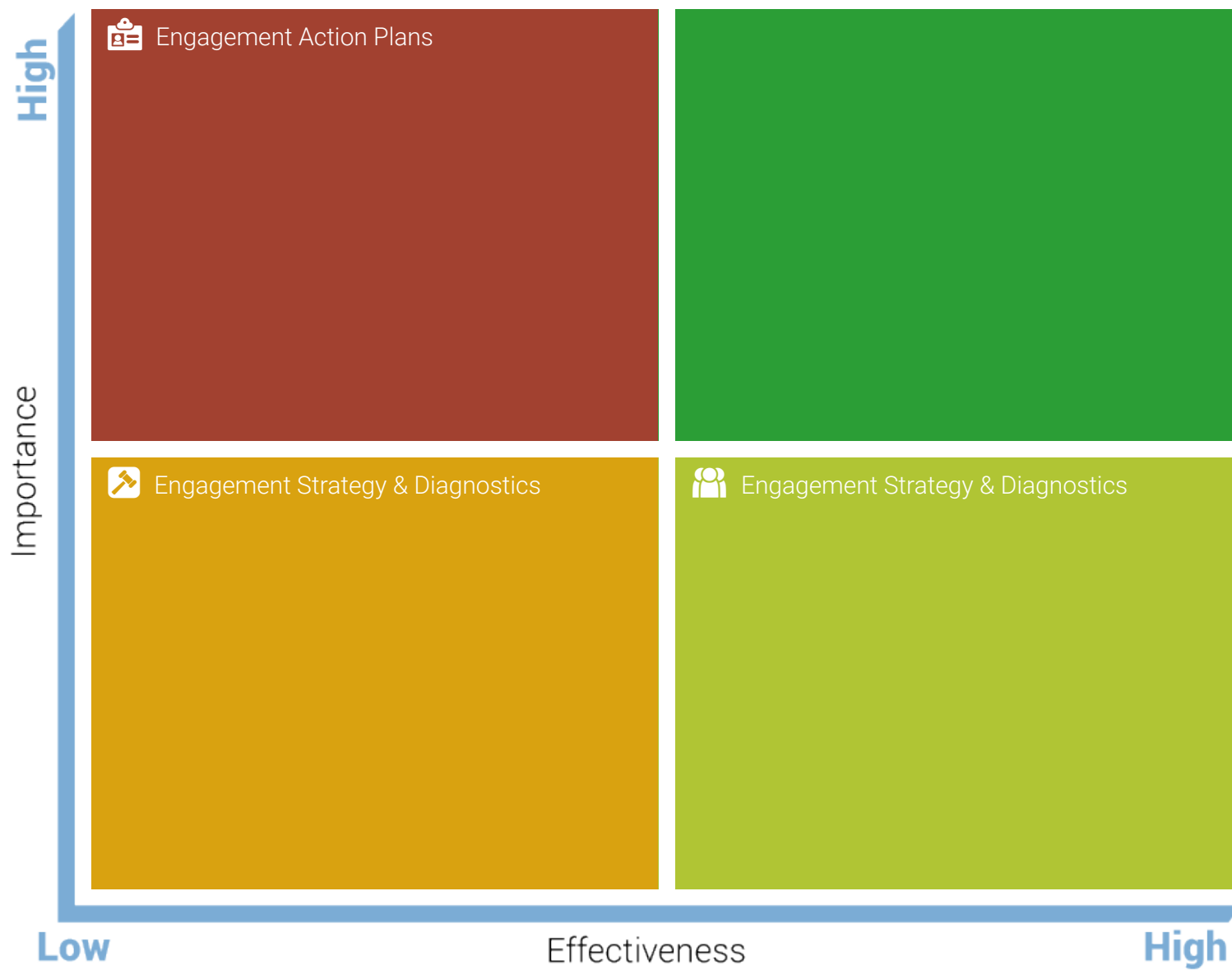
The HR leader must focus on improving the areas in the top left quadrant first in order to see the biggest impact.



Area Prioritization Grid

This prioritization grid reflects the opinions of the team leader and the team regarding area importance and effectiveness. The placement of each area within the grid corresponds to a call to action. Use this grid to discuss differences in opinions and to reach a consensus before creating an area improvement plan.





 Team Leader  Team  Both



	Improve Area		Leverage Area
	Evaluate Area		Maintain Area



Employee Engagement Overall Results



Use the average scores for all of the areas in this function to get an understanding of how this function scored. The team leader and the team's responses are separated to give an indication of the perceived importance and effectiveness for this function. The rankings indicate how this function performed against the others. Prioritize this function if it has a high importance, but a low effectiveness ranking.

Team Leader		Team
7.5	 Importance Score	7.14
6.5	 Effectiveness Score	7.07
6	 Importance Rank (out of 7)	6
8	 Effectiveness Rank (out of 7)	6

Area Accountabilities

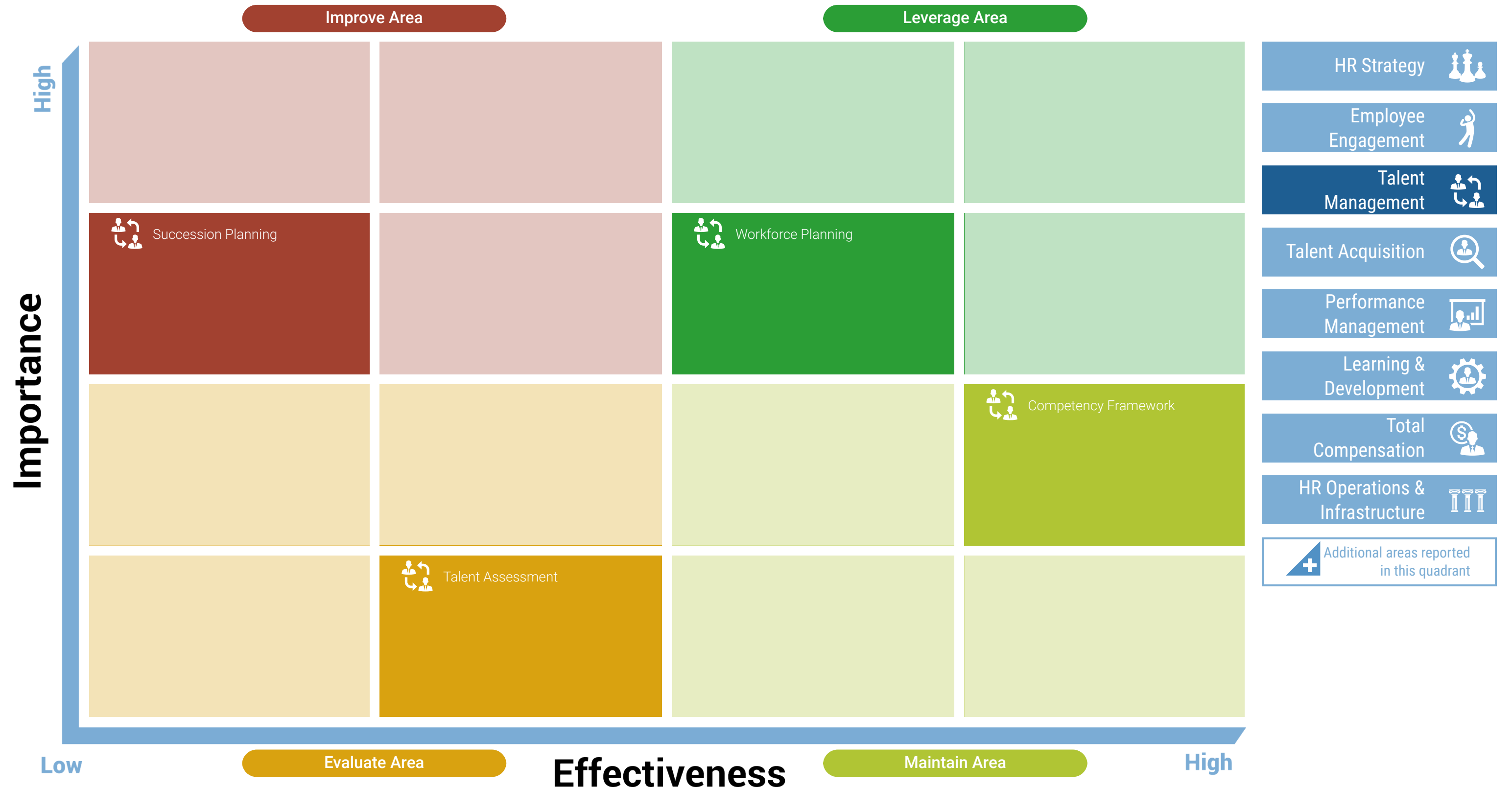
The following respondents have identified themselves as being accountable over these areas.

 Engagement Strategy & Diagnostics	Kimberly Johnson
 Engagement Action Plans	Kimberly Johnson

 Engagement Action Plans	The most important aspect of doing an engagement survey - taking action on the results. Engagement action planning may start off as a project, but in the best companies becomes an important part of the culture leading to increased employee engagement and ultimately increased business success.	 Engagement Strategy & Diagnostics	The process of surveying employees as a first step in the engagement program. This allows organizations to understand engagement levels and identify 'priority' drivers of engagement, which have scored low, but have a high impact on engagement.
15th	Most Important Area (out of 31)	23rd	Most Important Area (out of 31)
30th	Most Effective Area (out of 31)	10th	Most Effective Area (out of 31)
7.5	Average Importance score	6.9	Average Importance score
6.4	Average Effectiveness score	7.6	Average Effectiveness score

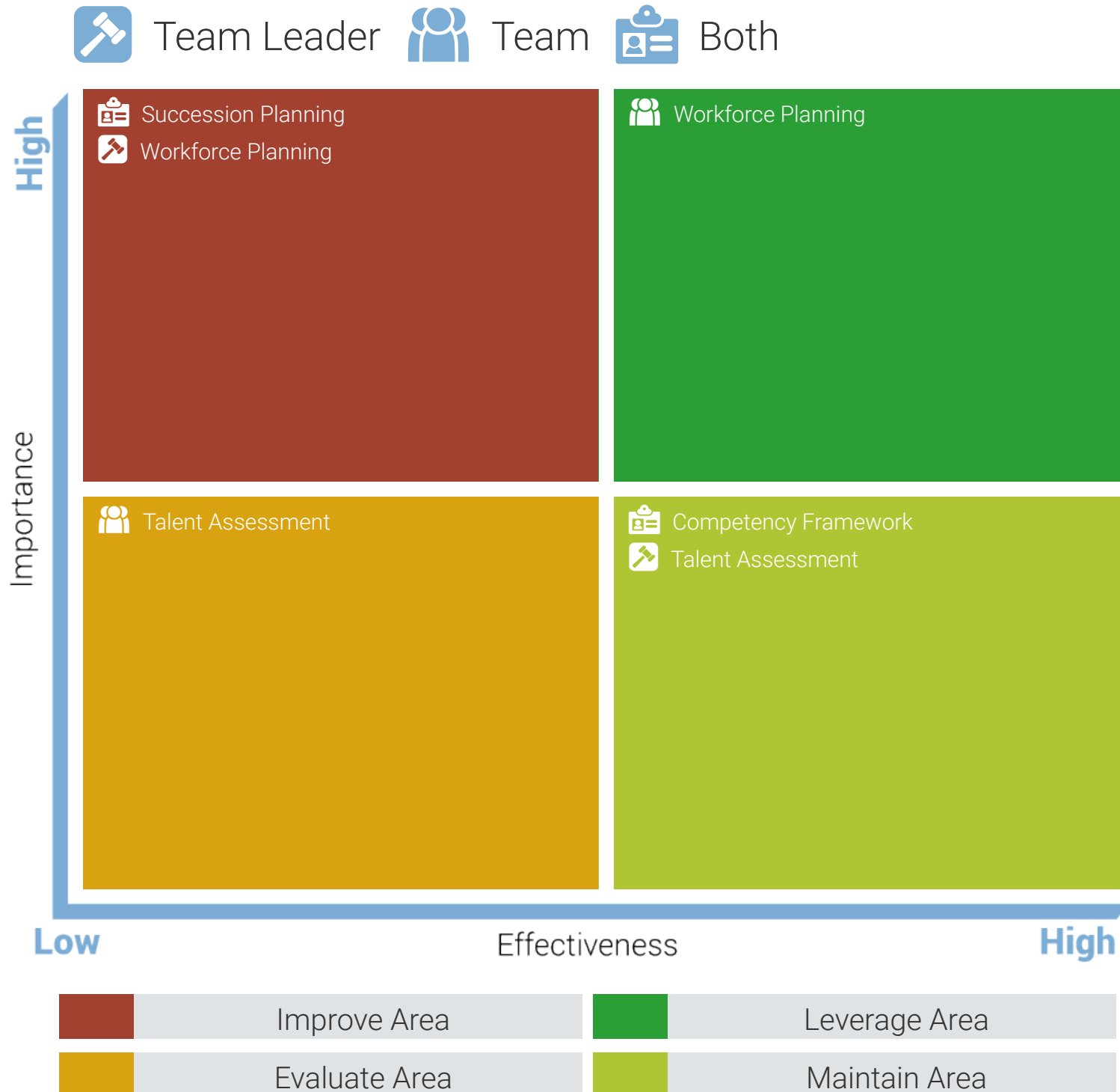


The HR leader must focus on improving the areas in the top left quadrant first in order to see the biggest impact.



Area Prioritization Grid

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Talent Management Overall Results

Use the average scores for all of the areas in this function to get an understanding of how this function scored. The team leader and the team's responses are separated to give an indication of the perceived importance and effectiveness for this function. The rankings indicate how this function performed against the others. Prioritize this function if it has a high importance, but a low effectiveness ranking.


Team Leader		Team
7.25	Importance Score	7.25
7.25	Effectiveness Score	7.14
7	Importance Rank (out of 7)	5
4	Effectiveness Rank (out of 7)	5

Area Accountabilities


The following respondents have identified themselves as being accountable over these areas.

Competency Framework	Melissa Brown
Workforce Planning	Melissa Brown
Talent Assessment	Melissa Brown
Succession Planning	Melissa Brown

 Succession Planning	A process for proactively identifying and developing talent internally to fill key roles within the organization.
10th	Most Important Area (out of 31)
27th	Most Effective Area (out of 31)
7.9	Average Importance score
6.4	Average Effectiveness score

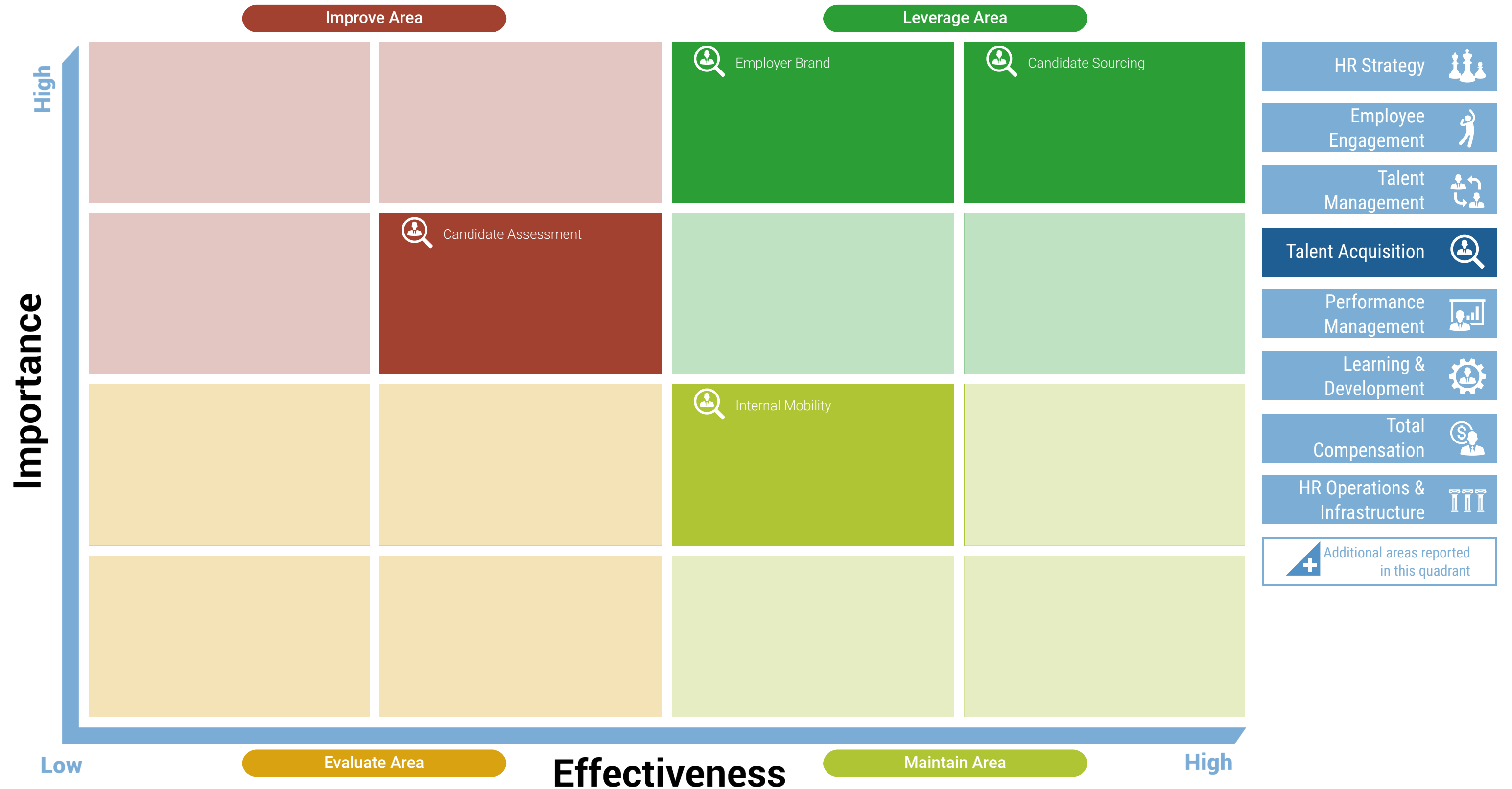
 Workforce Planning	Strategic workforce planning is a series of exercises that determine the gaps between the current talent in a department and the talent required to meet business objectives.
16th	Most Important Area (out of 31)
11th	Most Effective Area (out of 31)
7.4	Average Importance score
7.5	Average Effectiveness score

 Competency Framework	Competencies are the knowledge, skills, and attributes that define the behaviors that employees must exhibit to perform well in their jobs. A competency framework is a collection of critical behaviors that inform a wide range of HR areas such as screening & selection, employee development, and succession planning.
20th	Most Important Area (out of 31)
5th	Most Effective Area (out of 31)
7.1	Average Importance score
7.8	Average Effectiveness score

 Talent Assessment	The identification of competencies and experiences required for success in the organization, as well as the evaluation of employees against these criteria. These are sometimes referred to as "high potential" or "leadership" assessments, depending upon the focus of the initiative.
27th	Most Important Area (out of 31)
21st	Most Effective Area (out of 31)
6.6	Average Importance score
7.0	Average Effectiveness score



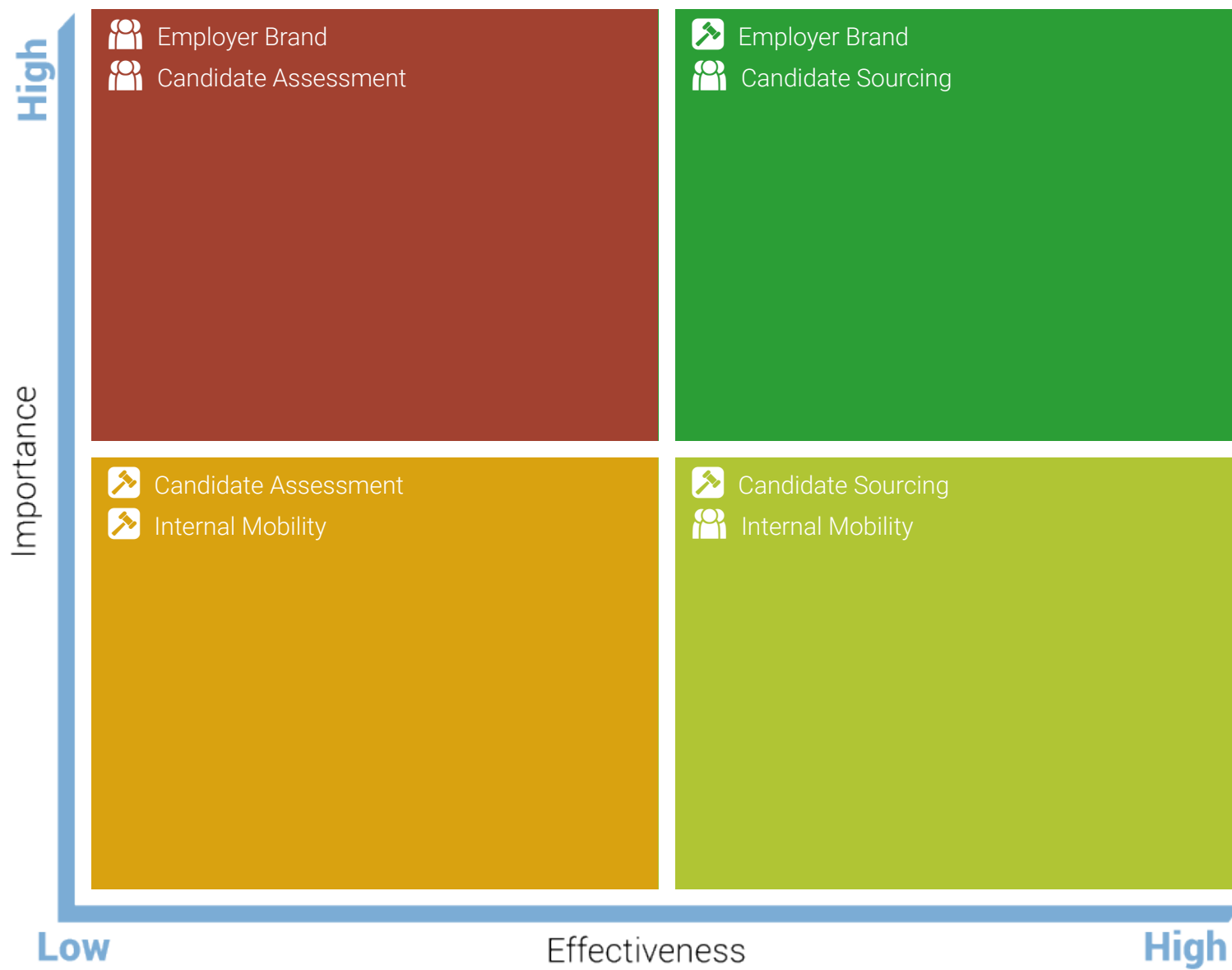
The HR leader must focus on improving the areas in the top left quadrant first in order to see the biggest impact.



Area Prioritization Grid

This prioritization grid reflects the opinions of the team leader and the team regarding area importance and effectiveness. The placement of each area within the grid corresponds to a call to action. Use this grid to discuss differences in opinions and to reach a consensus before creating an area improvement plan.

Team Leader Team Both



Improve Area
 Leverage Area
 Evaluate Area
 Maintain Area

Talent Acquisition Overall Results

Use the average scores for all of the areas in this function to get an understanding of how this function scored. The team leader and the team's responses are separated to give an indication of the perceived importance and effectiveness for this function. The rankings indicate how this function performed against the others. Prioritize this function if it has a high importance, but a low effectiveness ranking.


Team Leader		Team
8.0	Importance Score	7.93
7.25	Effectiveness Score	7.61
3	Importance Rank (out of 7)	2
5	Effectiveness Rank (out of 7)	2


Area Accountabilities


The following respondents have identified themselves as being accountable over these areas.

Employer Brand	Melissa Brown
Candidate Sourcing	Melissa Brown
Candidate Assessment	Melissa Brown
Internal Mobility	Melissa Brown

 Employer Brand	The Employee Value Proposition (EVP) is a unique and clearly defined set of attributes and benefits that captures an employee's overall work experience within an organization. The employer brand is the external manifestation of the EVP.
2nd	Most Important Area (out of 31)
14th	Most Effective Area (out of 31)
8.8	Average Importance score
7.5	Average Effectiveness score

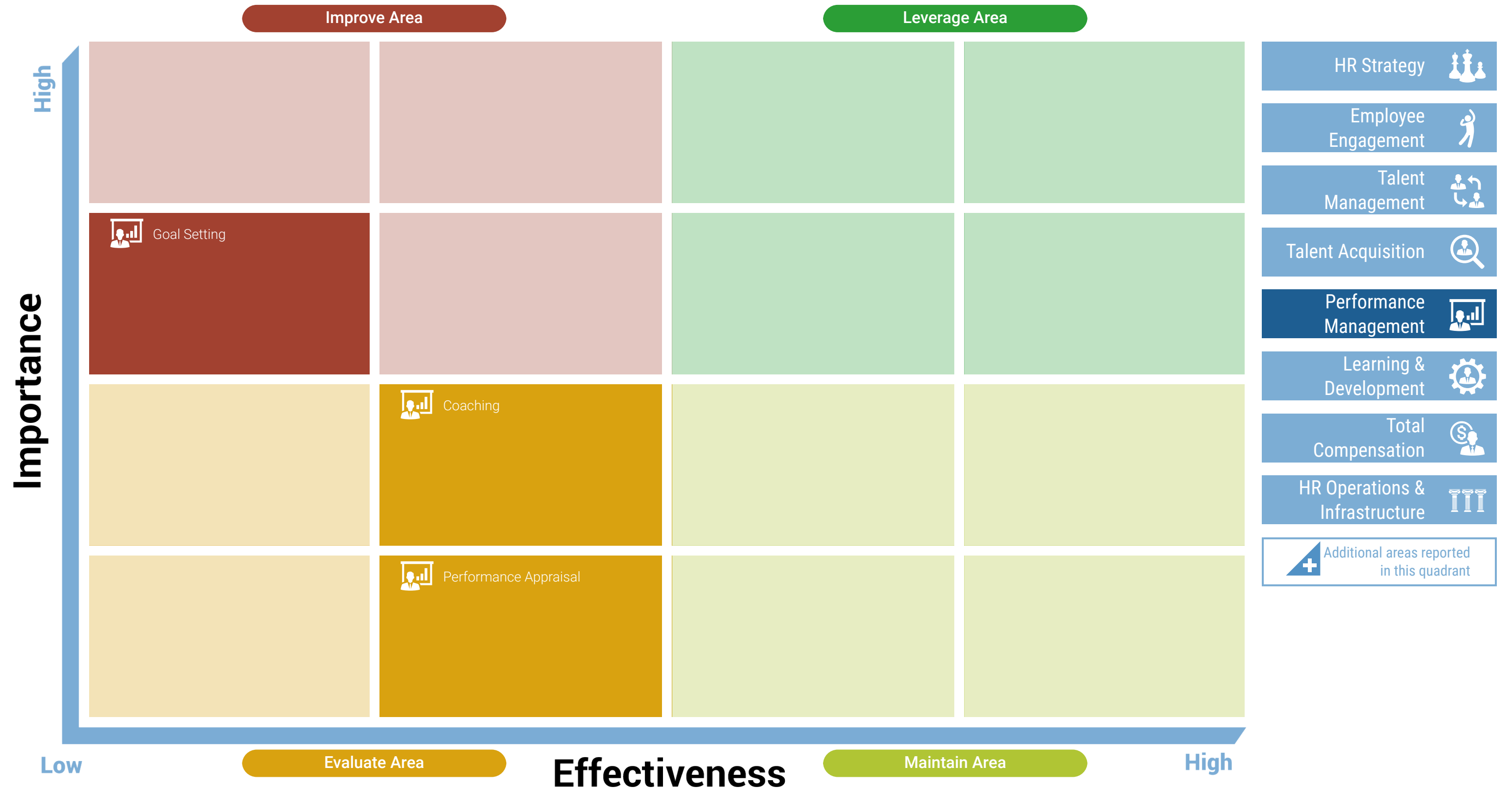
 Candidate Sourcing	The process of identifying target talent profiles, developing strategies to attract both active and passive candidates, and screening candidates both through their resume and through initial interviews.
5th	Most Important Area (out of 31)
2nd	Most Effective Area (out of 31)
8.4	Average Importance score
8.1	Average Effectiveness score

 Candidate Assessment	Evaluating candidates against the target talent profile through in-depth interviews and pre-hire testing as appropriate, in order to make a selection decision. This area also includes reference and background checks as well as presenting and negotiating offers of employment.
12th	Most Important Area (out of 31)
23rd	Most Effective Area (out of 31)
7.8	Average Importance score
7.0	Average Effectiveness score

 Internal Mobility	The movement of employees, both local and global, into similar or different roles. As internal mobility provides career and development opportunities for employees, it can be an effective engagement and retention strategy.
22nd	Most Important Area (out of 31)
9th	Most Effective Area (out of 31)
6.9	Average Importance score
7.6	Average Effectiveness score



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Area Prioritization Grid

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Team Leader Team Both



Improve Area
 Leverage Area
 Evaluate Area
 Maintain Area

Performance Management Overall Results

Use the average scores for all of the areas in this function to get an understanding of how this function scored. The team leader and the team's responses are separated to give an indication of the perceived importance and effectiveness for this function. The rankings indicate how this function performed against the others. Prioritize this function if it has a high importance, but a low effectiveness ranking.

Team Leader		Team
7.67	Importance Score	7.1
8.33	Effectiveness Score	6.86
4	Importance Rank (out of 7)	7
1	Effectiveness Rank (out of 7)	8

Area Accountabilities

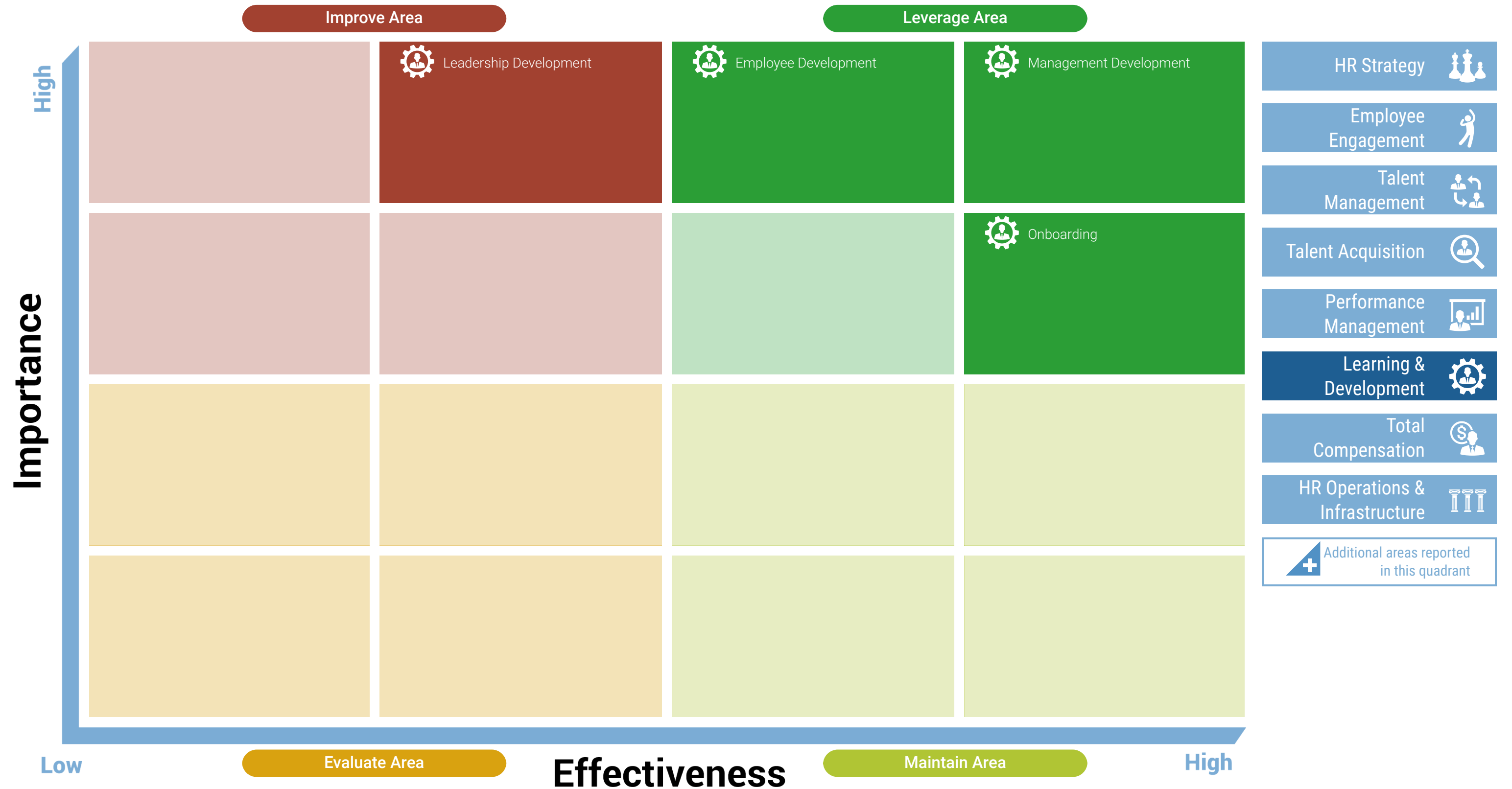
The following respondents have identified themselves as being accountable over these areas.

Goal Setting	Jason Brown
Performance Appraisal	Jason Brown
Coaching	M. Clark, J. Brown

 Goal Setting	Setting goals is an essential part of performance management as it ensures employees' work is aligned with the organization and team goals to keep the employee on track and drive performance and results.	 Coaching	Coaching helps an employee grow and develop. It focuses on professional development and future behavior, and is used to help employees progress by releasing potential in a way that works best for the individual AND the organization.	 Performance Appraisal	Performance appraisals evaluate how an employee is doing against stated goals and direct development needs. There are many different types of performance appraisals however they should include expectations of the role, goals and feedback.
13th	Most Important Area (out of 31)	18th	Most Important Area (out of 31)	28th	Most Important Area (out of 31)
25th	Most Effective Area (out of 31)	22nd	Most Effective Area (out of 31)	17th	Most Effective Area (out of 31)
7.6	Average Importance score	7.3	Average Importance score	6.6	Average Importance score
6.8	Average Effectiveness score	7.0	Average Effectiveness score	7.4	Average Effectiveness score



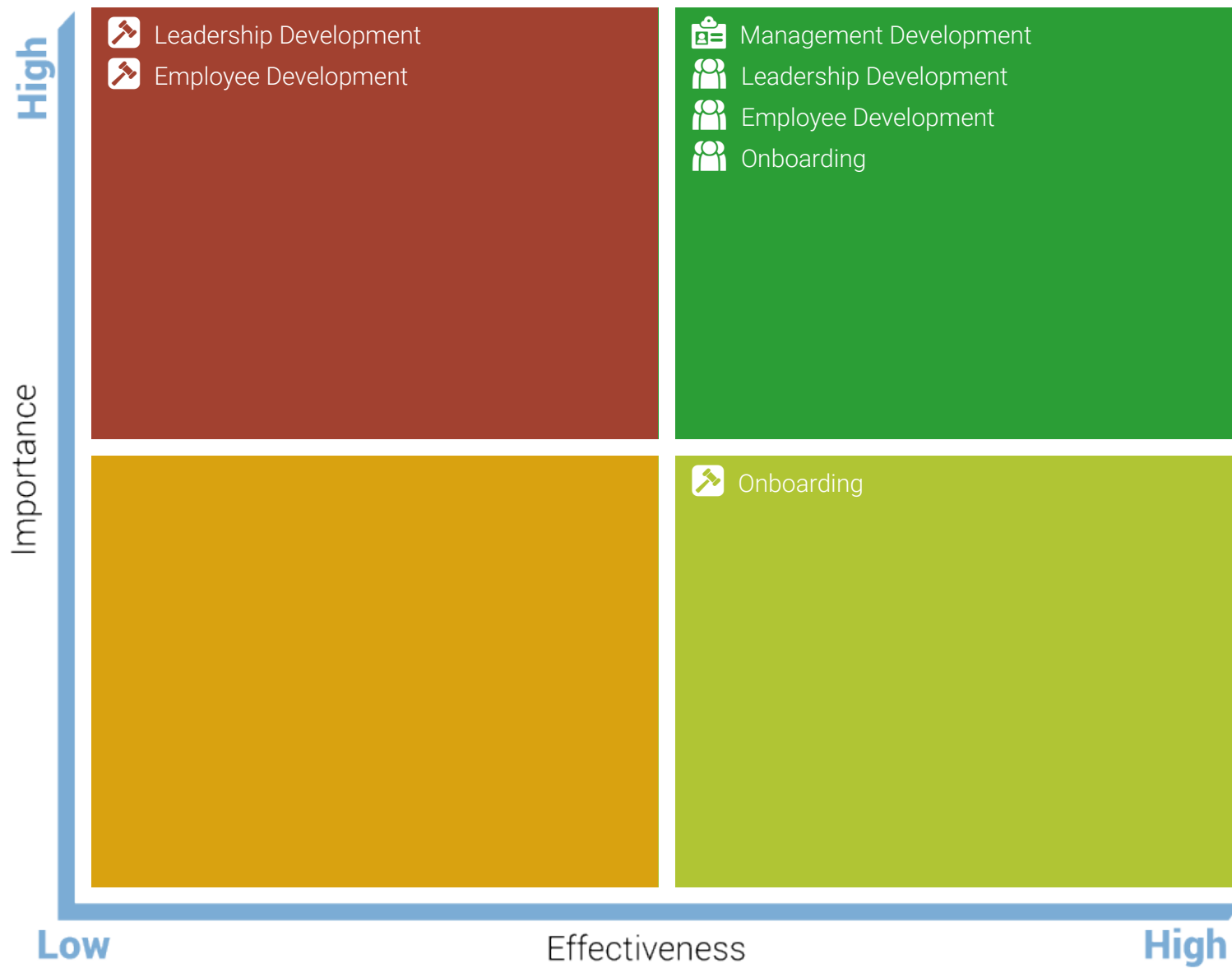
The HR leader must focus on improving the areas in the top left quadrant first in order to see the biggest impact.



Area Prioritization Grid

This prioritization grid reflects the opinions of the team leader and the team regarding area importance and effectiveness. The placement of each area within the grid corresponds to a call to action. Use this grid to discuss differences in opinions and to reach a consensus before creating an area improvement plan.

Team Leader Team Both



	Improve Area		Leverage Area
	Evaluate Area		Maintain Area

Learning & Development Overall Results

Use the average scores for all of the areas in this function to get an understanding of how this function scored. The team leader and the team's responses are separated to give an indication of the perceived importance and effectiveness for this function. The rankings indicate how this function performed against the others. Prioritize this function if it has a high importance, but a low effectiveness ranking.

Team Leader		Team
8.75	Importance Score	8.29
7.0	Effectiveness Score	7.68
1	Importance Rank (out of 7)	1
7	Effectiveness Rank (out of 7)	1

Area Accountabilities


The following respondents have identified themselves as being accountable over these areas.

Onboarding	M. Clark, J. Brown
Employee Development	M. Clark, J. Brown
Management Development	M. Clark, J. Brown
Leadership Development	M. Clark, J. Brown

 Leadership Development	Leadership development uses multi-dimensional learning to strengthen competencies. Often, leadership development is more proactive than employee development, particularly when it's a part of a succession plan.
1st	Most Important Area (out of 31)
18th	Most Effective Area (out of 31)
8.9	Average Importance score
7.4	Average Effectiveness score

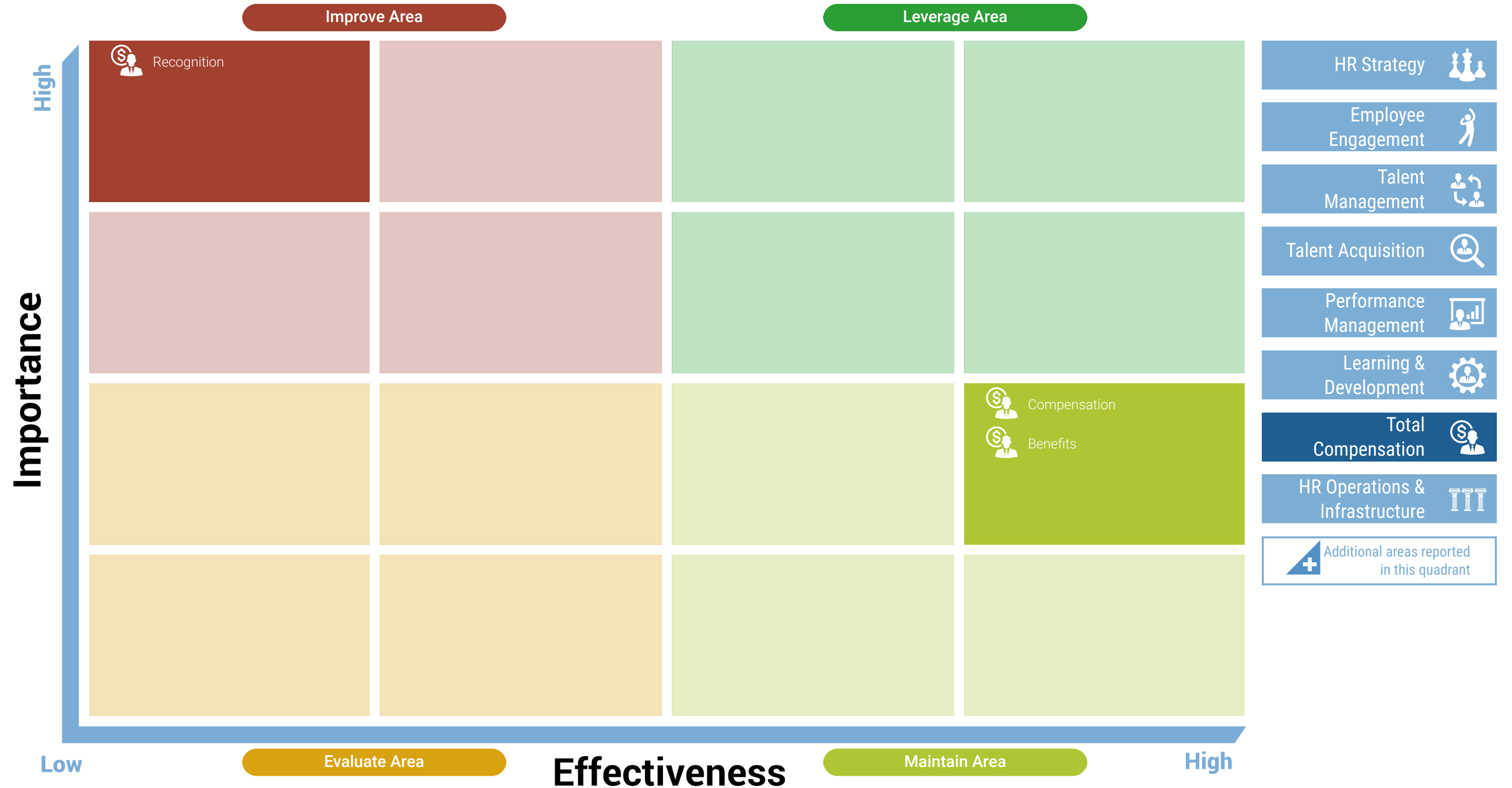
 Management Development	Management development is focused on developing the core management skills required for the day to day operations of a team or department. Development is multi-dimensional and encompasses on the job as well as formal learning methods.
3rd	Most Important Area (out of 31)
4th	Most Effective Area (out of 31)
8.6	Average Importance score
7.9	Average Effectiveness score

 Employee Development	Employee development uses multi-dimensional learning, including on-the-job learning opportunities and manager support, to strengthen employee competencies.
4th	Most Important Area (out of 31)
15th	Most Effective Area (out of 31)
8.4	Average Importance score
7.5	Average Effectiveness score

 Onboarding	Onboarding is the process of welcoming, inducting, orienting, and engaging a new employee to help him or her acclimate to the new environment and become productive members of the team.
14th	Most Important Area (out of 31)
8th	Most Effective Area (out of 31)
7.5	Average Importance score
7.6	Average Effectiveness score



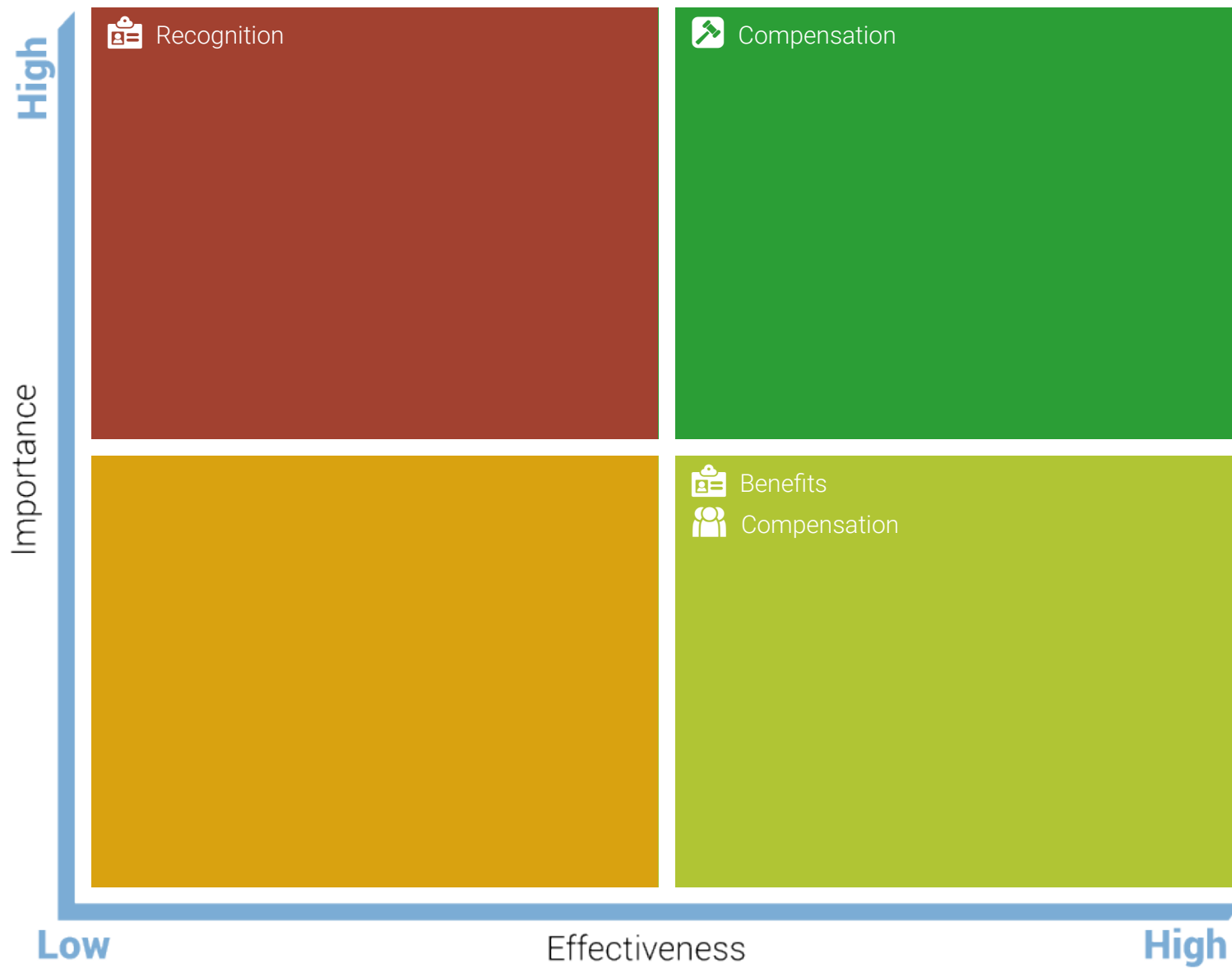
The HR leader must focus on improving the areas in the top left quadrant first in order to see the biggest impact.



Area Prioritization Grid

This prioritization grid reflects the opinions of the team leader and the team regarding area importance and effectiveness. The placement of each area within the grid corresponds to a call to action. Use this grid to discuss differences in opinions and to reach a consensus before creating an area improvement plan.

Team Leader Team Both



	Improve Area		Leverage Area
	Evaluate Area		Maintain Area

Total Compensation Overall Results

Use the average scores for all of the areas in this function to get an understanding of how this function scored. The team leader and the team's responses are separated to give an indication of the perceived importance and effectiveness for this function. The rankings indicate how this function performed against the others. Prioritize this function if it has a high importance, but a low effectiveness ranking.

Team Leader		Team
8.0	Importance Score	7.33
7.67	Effectiveness Score	7.33
2	Importance Rank (out of 7)	4
2	Effectiveness Rank (out of 7)	3

Area Accountabilities

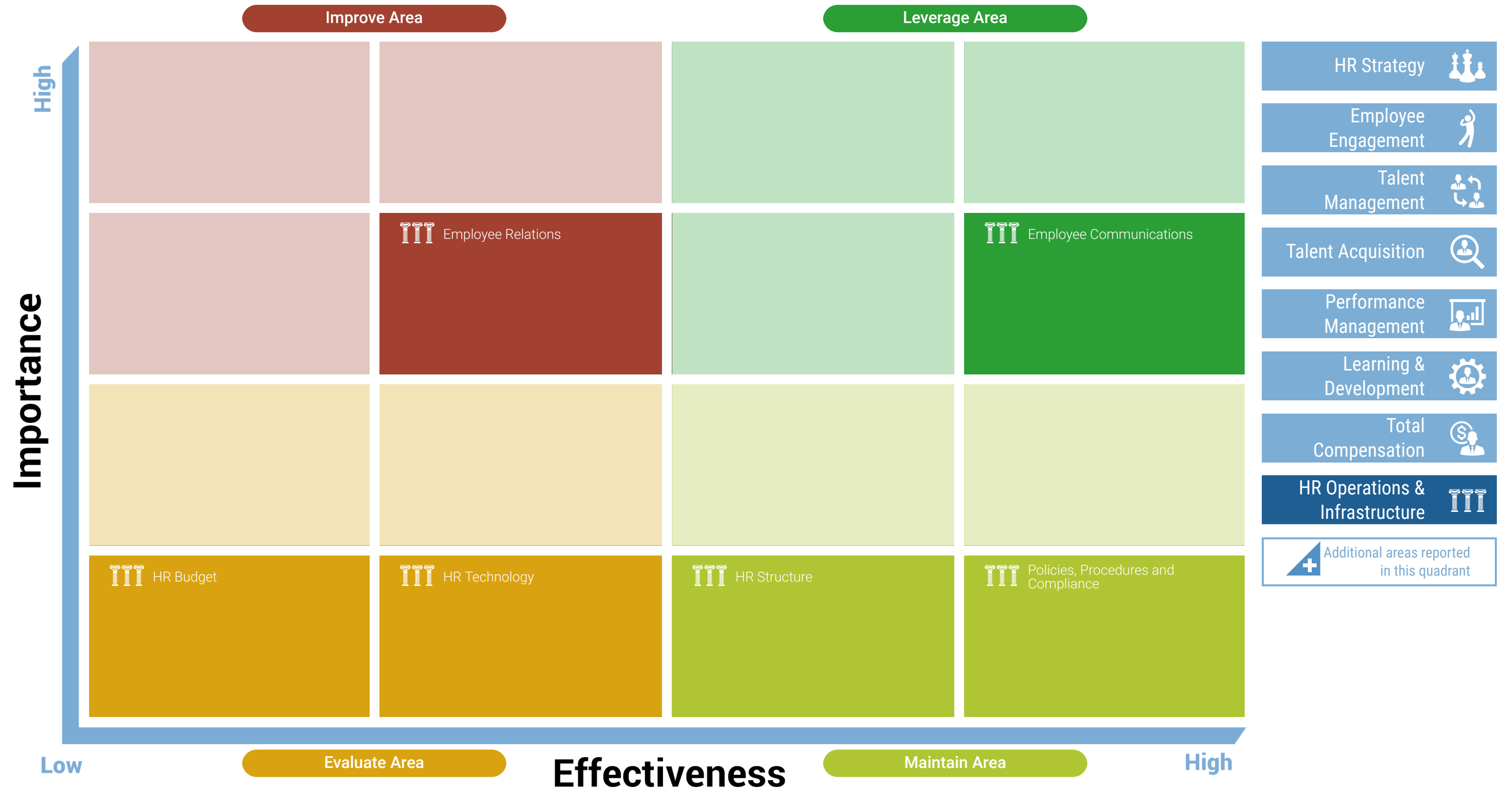
The following respondents have identified themselves as being accountable over these areas.

Compensation	No Owner
Benefits	No Owner
Recognition	No Owner

 Recognition	Includes both monetary and non-monetary rewards as well as acknowledgement and praise.	 Compensation	Base pay and any variable pay such as short and long-term incentives.	 Benefits	Health, retirement, and/or paid time off plans provided completely, partially, or facilitated by the organization to address employee health, paid time off, and retirement. Depending on the jurisdiction, some benefits may be legally mandated (e.g. workers' compensation insurance).
8th	Most Important Area (out of 31)	17th	Most Important Area (out of 31)	24th	Most Important Area (out of 31)
28th	Most Effective Area (out of 31)	3rd	Most Effective Area (out of 31)	6th	Most Effective Area (out of 31)
8.1	Average Importance score	7.3	Average Importance score	6.9	Average Importance score
6.4	Average Effectiveness score	8.0	Average Effectiveness score	7.8	Average Effectiveness score



The HR leader must focus on improving the areas in the top left quadrant first in order to see the biggest impact.



Area Prioritization Grid

This prioritization grid reflects the opinions of the team leader and the team regarding area importance and effectiveness. The placement of each area within the grid corresponds to a call to action. Use this grid to discuss differences in opinions and to reach a consensus before creating an area improvement plan.





 Team Leader
  Team
  Both



Improve Area
 Leverage Area
 Evaluate Area
 Maintain Area

HR Operations & Infrastructure Overall Results

Use the average scores for all of the areas in this function to get an understanding of how this function scored. The team leader and the team's responses are separated to give an indication of the perceived importance and effectiveness for this function. The rankings indicate how this function performed against the others. Prioritize this function if it has a high importance, but a low effectiveness ranking.

Team Leader		Team
7.17		6.64
Importance Score		
7.33		7.29
Effectiveness Score		
8		8
Importance Rank (out of 7)		
3		4
Effectiveness Rank (out of 7)		

Area Accountabilities

The following respondents have identified themselves as being accountable over these areas.

HR Structure	Kimberly Johnson
Policies, Procedures and Compliance	Kimberly Johnson
Employee Relations	Jason Brown
Employee Communications	Jason Brown
HR Technology	No Owner
HR Budget	Kimberly Johnson

<p>III Employee Relations</p>	<p>Employee relations is the management of productive individual employee-employer relationship and employment contracts in non-unionized environments.</p>	<p>III Employee Communications</p>	<p>Organizational success depends on effective communication within the organization. Employee communication can help boost engagement and retention.</p>	<p>III HR Technology</p>	<p>The underpinning systems which support HR delivery. These range from basic spreadsheets to more complex Talent Management systems.</p>
<p>9th</p>	<p>Most Important Area (out of 31)</p>	<p>11th</p>	<p>Most Important Area (out of 31)</p>	<p>26th</p>	<p>Most Important Area (out of 31)</p>
<p>19th</p>	<p>Most Effective Area (out of 31)</p>	<p>1st</p>	<p>Most Effective Area (out of 31)</p>	<p>24th</p>	<p>Most Effective Area (out of 31)</p>
<p>8.0</p>	<p>Average Importance score</p>	<p>7.8</p>	<p>Average Importance score</p>	<p>6.8</p>	<p>Average Importance score</p>
<p>7.4</p>	<p>Average Effectiveness score</p>	<p>8.3</p>	<p>Average Effectiveness score</p>	<p>6.9</p>	<p>Average Effectiveness score</p>
<p>III Policies, Procedures and Compliance</p>	<p>Written directives, rules, mandates, and instructions designed to support overarching organizational goals, comply with legislation, and drive overall efficiency.</p>	<p>III HR Budget</p>	<p>The fiscal plan which supports, and sometimes constrains, HR delivery.</p>	<p>III HR Structure</p>	<p>The way in which HR staff and services are organized in order to deliver support to the organization.</p>
<p>29th</p>	<p>Most Important Area (out of 31)</p>	<p>30th</p>	<p>Most Important Area (out of 31)</p>	<p>31st</p>	<p>Most Important Area (out of 31)</p>
<p>7th</p>	<p>Most Effective Area (out of 31)</p>	<p>31st</p>	<p>Most Effective Area (out of 31)</p>	<p>13th</p>	<p>Most Effective Area (out of 31)</p>
<p>6.1</p>	<p>Average Importance score</p>	<p>5.9</p>	<p>Average Importance score</p>	<p>5.8</p>	<p>Average Importance score</p>
<p>7.6</p>	<p>Average Effectiveness score</p>	<p>6.1</p>	<p>Average Effectiveness score</p>	<p>7.5</p>	<p>Average Effectiveness score</p>



Using the data provided in the report, your team will now benefit from an open ended discussion regarding the discrepancies in the scores across all of the respondents. This exercise is beneficial because it will allow your team to reach a consensus on the perceived and real importance and effectiveness scores of the areas with the widest gaps.

AFTER THIS ALIGNMENT EXERCISE, YOUR TEAM SHOULD HAVE IDENTIFIED THE FOLLOWING:



1. Why are there gaps in respondents' importance scores?

- Were they due to departmental differences or miscommunication from the business?



2. Why are there gaps in respondents' effectiveness scores?

- Were they due to perception or actual performance?
- Do the processes perform better in some departments versus others?



3. Which 3 - 5 areas will your team focus on improving in the next 12 months?

- Build an area improvement roadmap around these selected areas to provide your team with an action plan for the next year.



4. Who will be accountable for the improvement of each of areas?

- Will it be an individual or a team?



5. What are your next steps following the alignment exercise?

- Create a list of actionable next steps for each area improvement initiative and assign an owner.



6. What products or services can McLean & Company provide to maximize the impact of your improvement initiatives?

- Workshops
- Guided Implementations
- Blueprints
- Consulting
- Diagnostic Programs



As the team leader, the following guide will help you get the most from your team's discussion. Ensure that the exercise will be conducted in a non-confrontational manner and that everyone's voice is heard. It is extremely important to highlight the biggest discrepancies in opinion first, so as to get the most out of the program.

① Set an agenda and boundaries

Once the team has gathered, tell the team that the purpose of the exercise is to reach a collective understanding of the effectiveness and importance of the HR areas so as to be able to prioritize area improvement initiatives. For the purpose of this discussion, prioritize the top 10 areas which have the widest spread between scores, but also consider the areas with the most extreme importance and effectiveness scores across the board.

② Break down the areas.

Use the HR Area Importance and HR Area Effectiveness pages sheet to identify the areas with the widest spread between scores. Use the Function In-depth Results sheets to dive deeper into the results for each area. Facilitate a discussion among the respondents who gave the areas the highest and lowest scores for importance and effectiveness. Why did they score the area the way they did? During this conversation, make sure to highlight at least 3 sub-areas for each area, which will make it easier to understand any underlying issues or perceived issues.

③ Build consensus.

Once your team has uncovered the reasons for the variations in scores, it's important to reach a team decision regarding the highest priority areas. As a team, decide where each area falls in terms of effectiveness and importance relative to one another and establish a list of 3-5 areas that are very important but not effective. This will be the first step in establishing an area improvement roadmap.

④ Identify current area owners.

Use the HR Area Accountability page from the report to get a snapshot of the current area owners. If an area does not have an owner, or if there is a lack of clarity around area ownership, discuss and decide who should be the area owner (or function owner). Additionally, pay attention to multiple areas which have the same area owner. This is a great opportunity to create a more even workload by introducing additional area owners or transitioning the responsibility of areas to other team members. Ensure that all relevant areas have owners going forward.

⑤ Take action.

Your team should now create a plan using the Post-Alignment Worksheet to outline what initiatives will be taken, what resources the action item owner will need, metrics for success as well as expected outcomes. For each action item, assign a timeline and a priority immediately. Distribute a Post-Alignment Worksheet to all area owners. This will help them keep track of their initiatives.

⑥ Follow up.

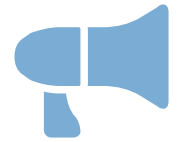
Following the alignment exercise, send a follow-up email summarizing the action items and their owners in order to improve the likelihood that the items will be followed. After 2-4 weeks, follow up with action item owners to see how well their action items are going. Work with owners to overcome any blocks or challenges they are facing and adjust deadlines if necessary.

⑦ Ongoing collaboration.

Establish a set schedule for the team to meet and discuss the progress of their initiatives and to uphold accountability.

⑧ Revisit the exercise.

After one year, conduct another team alignment exercise to see how the results compare. Ideally, the same participants will take part in the annual alignment exercise. This will allow the entire team to see how the improvement initiatives helped improve the effectiveness scores.



This page outlines the respondent information for the survey. Refer to this page next time you conduct the alignment exercise to bring in the same respondents, or respondents of similar backgrounds or functions within the organization. It is very important to have a consistent selection of team members completing this exercise so as to highlight the impact of the improvement initiatives. Ideally, the gaps for each area would minimize over time, but having respondents with radically different roles in the organization might skew the results.

2015 Alignment Exercise Participants

Name of Respondent	Title
Melissa Brown	Director
Jason Brown	Manager
Mark Clark	Director
Kimberly Johnson	CHRO / Head of HR
James Johnson	Team Member
Amy Lewis	Manager
Nicole Miller	Manager
Karen Moore	Team Member

Fill in area name		Fill in area owner's Name	
Sub-area 1		Considerations and Diagnostic Questions	Considerations and Diagnostic Questions
Sub-area 2			
Sub-area 3			
Sub-area 4			

Steps	Goals	Metrics for success	Timeline

Steps	Goals	Metrics for success	Timeline

Steps	Goals	Metrics for success	Timeline



HR Strategy

Strategy: The process of linking HR management directly to the strategic plan of your organization. Human resources planning identifies current and future human resources needs. This, in turn, supports an organization in achieving its goals.

Culture: The act of shaping and sustaining the shared attitudes, beliefs, customs, and rules of an organization. Culture can be demonstrated in many ways, including how the organization treats its employees, customers, and the wider community.

Organizational Design: The deliberate process of configuring structures, processes, reward systems, and people practices to create an effective organization capable of achieving the business strategy.

Change Management: The use of a structured process and set of tools to lead the people side of change and achieve a desired outcome.

Metrics & Analytics: The effective use of workforce data to maximize retention, engagement, and productivity. Benchmarking and analytics help HR leaders make better workforce decisions to drive business performance.



Talent Management

Competency Framework: Competencies are the knowledge, skills, and attributes that define the behaviors that employees must exhibit to perform well in their jobs. A competency framework is a collection of critical behaviors that inform a wide range of HR areas such as screening & selection, employee development, and succession planning.

Workforce Planning: Strategic workforce planning is a series of exercises that determine the gaps between the current talent in a department and the talent required to meet business objectives.

Talent Assessment: The identification of competencies and experiences required for success in the organization, as well as the evaluation of employees against these criteria. These are sometimes referred to as “high potential” or “leadership” assessments, depending upon the focus of the initiative.

Succession Planning: A process for proactively identifying and developing talent internally to fill key roles within the organization.



Employee Engagement

Engagement Strategy & Diagnostics: The process of surveying employees as a first step in the engagement program. This allows organizations to understand engagement levels and identify 'priority' drivers of engagement, which have scored low, but have a high impact on engagement.

Engagement Action Plans: The most important aspect of doing an engagement survey - taking action on the results. Engagement action planning may start off as a project, but in the best companies becomes an important part of the culture leading to increased employee engagement and ultimately increased business success.



Talent Acquisition

Employer Brand: The Employee Value Proposition (EVP) is a unique and clearly defined set of attributes and benefits that captures an employee's overall work experience within an organization. The employer brand is the external manifestation of the EVP.

Candidate Sourcing: The process of identifying target talent profiles, developing strategies to attract both active and passive candidates, and screening candidates both through their resume and through initial interviews.

Candidate Assessment: Evaluating candidates against the target talent profile through in-depth interviews and pre-hire testing as appropriate, in order to make a selection decision. This area also includes reference and background checks as well as presenting and negotiating offers of employment.

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Coaching: Coaching helps an employee grow and develop. It focuses on professional development and future behavior, and is used to help employees progress by releasing potential in a way that works best for the individual AND the organization.



Total Compensation

Compensation: Base pay and any variable pay such as short and long-term incentives.

Benefits: Health, retirement, and/or paid time off plans provided completely, partially, or facilitated by the organization to address employee health, paid time off, and retirement. Depending on the jurisdiction, some benefits may be legally mandated (e.g. workers' compensation insurance).

Recognition: Includes both monetary and non-monetary rewards as well as acknowledgement and praise.



Learning & Development

Onboarding: Onboarding is the process of welcoming, inducting, orienting, and engaging a new employee to help him or her acclimate to the new environment and become productive members of the team.

Employee Development: Employee development uses multi-dimensional learning, including on-the-job learning opportunities and manager support, to strengthen employee competencies.

Management Development: Management development is focused on developing the core management skills required for the day to day operations of a team or department. Development is multi-dimensional and encompasses on the job as well as formal learning methods.

Leadership Development: Leadership development uses multi-dimensional learning to strengthen competencies. Often, leadership development is more proactive than employee development, particularly when it's a part of a succession plan.



HR Operations & Infrastructure

HR Structure: The way in which HR staff and services are organized in order to deliver support to the organization.

Policies, Procedures and Compliance: Written directives, rules, mandates, and instructions designed to support overarching organizational goals, comply with legislation, and drive overall efficiency.

Employee Relations: Employee relations is the management of productive individual employee-employer relationship and employment contracts in non-unionized environments.

Employee Communications: Organizational success depends on effective communication within the organization. Employee communication can help boost engagement and retention.

HR Technology: The underpinning systems which support HR delivery. These range from basic spreadsheets to more complex Talent Management systems.

HR Budget: The fiscal plan which supports, and sometimes constrains, HR delivery.